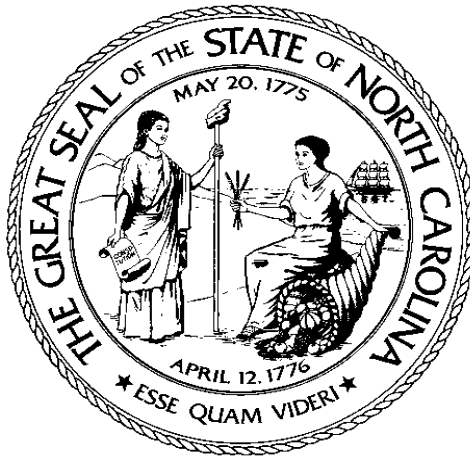


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Application Preliminary Evaluation Packet

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:

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

Date of Review:

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09/30/2016

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Monroe Charter Academy

Public charter schools opening the fall of 2018

Due by 5:00 pm, September 19, 2016

North Carolina Department of Public Instruction
NCDPI/Office of Charter Schools
301 N. Wilmington Street
Raleigh NC 27601-2825
919-807-3491

Mailing Address:
6303 Mail Service Center
Raleigh, NC 27699-6303

**CHARTER SCHOOL
2016 Application Process**

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

APPLICATION DUE DATE/TIME

September 19, 2016 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

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

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

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 19, 2016 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

1. All required Appendices should be clearly titled, include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...), and submitted in the appropriate places within the application.
2. **Any** answer given within the application which is not original to the applicant, the applicant must provide a citation to the source of the answer.
3. Review all elements of your application for completeness before submitting.
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

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TABLE OF CONTENTS

<u>I.</u>	<u>APPLICATION CONTACT INFORMATION</u>	<u>6</u>
	Grade Levels Served and Total Student Enrollment:	7
	Concerns and Additional Questions	9
<u>II.</u>	<u>MISSION and PURPOSES</u>	<u>10</u>
	Mission:	10
	Educational need and Targeted Student Population of the Proposed Charter School:	10
	Purposes of the Proposed Charter School:	11
	Goals for the Proposed Charter School:	12
	Concerns and Additional Questions	15
<u>III.</u>	<u>EDUCATION PLAN</u>	<u>16</u>
	Instructional Program:	16
	Curriculum and Instructional Design:	17
	Special Programs and "At-Risk" Students	20
	Exceptional Children	22
	Student Performance Standards	24
	Student Conduct:	26
	Concerns and Additional Questions	28
<u>IV.</u>	<u>GOVERNANCE and CAPACITY</u>	<u>30</u>
	Governance:	30
	Governance and Organizational Structure of Private Non-Profit Organization:	30
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	37
	Private School Conversions:	37
	Projected Staff:	37
	Staffing Plans, Hiring, and Management	38
	Staff Evaluation and Professional Development	41
	Enrollment and Marketing:	43
	Marketing Plan	43
	Parent and Community Involvement	44
	Admissions Policy	45
	Weighted Lottery	46
	PROJECTED ENROLLMENT	47
	Concerns and Additional Questions	48
<u>V.</u>	<u>OPERATIONS</u>	<u>50</u>
	Transportation Plan:	50
	School Lunch Plan:	50
	Civil Liability and Insurance	51
	Health and Safety Requirements:	52
	Facility:	52
	Facility Contingency Plan:	53
	Concerns and Additional Questions	54
<u>VI.</u>	<u>FINANCIAL PLAN</u>	<u>55</u>
	Budget: Revenue Projections from each LEA 2018-19	55
	Total Budget: Revenue Projections 2018-19 through 2022-2023	56
	Personnel Budget: Expenditure Projections 2018-19 through 2022-2023	57
	Operations Budget: Expenditure Projections	59
	Overall Budget:	61

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Budget Narrative:	61
Financial Compliance:	65
Concerns and Additional Questions	67
VII.	
AGREEMENT PAGE	
Application Fee:	68
Applicant Signature:	68
Total External Evaluator Votes	70
Total Subcommittee Votes	70
CSAB Votes	70
Initial Screening	70
External Evaluator	71
Charter School Advisory Board Subcommittee	77
Overall Summary	79

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: *Monroe Charter Academy*

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

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

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

Name of contact person: *Eddie Goodall*

Title/Relationship to nonprofit: *Chair of the Board*

Mailing address: *2132 Greenbrook Pkwy.
Weddington NC 28104*

Primary telephone: *704-236-1234* Alternative telephone: *704-846-5098*

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

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

County: *UNION*

LEA: *900-Union County Public Schools*

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

No:

Yes:

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

No:

Yes:

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

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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*

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

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

Yes:

No:

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

Yes:

No:

What is the name of the nonprofit organization that governs this charter school? Monroe Charter Academy

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2018 Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02	216
Second Year	K,01,02,03	288
Third Year	K,01,02,03,04	360
Fourth Year	K,01,02,03,04,05	432
Fifth Year	K,01,02,03,04,05	450

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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.

monroecharter

Signature

monroecharter

Printed Name

Eddie Goodall, Board Chair

Title

09/19/2016

Date

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**Section I: Application Contact Information
Concerns and Additional Questions**

Reviewer

**Page
Reference**

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

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

Our mission is to develop each child into an academically thriving citizen, by partnering with parents and the community, utilizing high expectations and a rigorous classical education, delivered with purposeful and spirited devotion.

Clearly describe the mission of the proposed charter school:

Children may not be products of our environments as much as they are products of our expectations. Academic excellence, along with the development of the child's character and life skills, will be our blended and uncompromising objectives. We will teach children classically, in the natural ways they want to learn, but with rigor. Our educators will maintain a purposeful cognizance of our academic goals and will deliver the education with undisguised love of their vocations and our children.

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 Academy's target population is the eastern part of the city of Monroe, as well as points east to Wingate and Marshville. In terms of demographics, the target population of the school stands in contrast to the demographics of the county as a whole. Nearly 80% of the county is white, 11.7% black, and 10.4% Hispanic. The racial and ethnic composition of the Academy will most likely be: 24.2% white, 32.5% black, and 40.7% Hispanic. The Hispanic population is underrepresented in charters across the state. Monroe Charter Academy wants to break that barrier. We have two board members who are both fluent in Spanish and educators. They, as the rest of the board know, that there is a need for school choice. All three Monroe area elementary schools (East Elementary, Benton Heights Elementary, and Walter Bickett Elementary) all have third grade reading scores below 33%.

- 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,*

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only compare the total enrollment to the total enrollment of the LEA is grades 9-12).

The total projected enrollment for Monroe Charter Academy is 450 students, serving grades K-5. The 450 students make up 2.4% of the ADM in Union County Schools for grades K-5 (18,375 students).

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

The Academy's educational plan will provide a good contrast with the LEA, but also share some similarities. The Academy will utilize the Core Knowledge Sequence, a classical approach to education that focuses on building a foundation and developing crucial grammar skills and a bank of knowledge throughout the years. While districts are pursuing a more personalized and a technology-based approach, the Academy's approach is more back-to-basics.

The Academy will also have a citizenship curriculum that will act to support the Core Knowledge Social Studies curriculum. The board believes that a more thoughtful investment in civics education will not only provide a contrast to the local LEA, but a contrast to most charter schools in the state.

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

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

The Six Legislative Purposes of a Charter School are:

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

2. Hold schools accountable for meeting measurable student achievement results:

The Academy's board will ensure that the school is meeting our goals set for each year. We will make sure that the Academy is meeting or exceeding growth every year and also increasing the school's proficiency rate. The board will have an Academic Committee that will include the principal to evaluate the academic success of the school on a monthly basis. The Academy will also

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have a Student Improvement Team led by the principal. The team will consist of one teacher representative from each grade, one board member, and a minimum of two parents. The team will make recommendations to the school improvement plan and assist in ensuring the school is reaching its academic goals.

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

The Academy will provide students with expanded choices by offering a classical approach to education through Core Knowledge. In addition to the classical approach, the Academy will have a focus on citizenship, parental involvement, and community investment.

5. Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.

The Academy will provide a different option for students at-risk. The board strongly believes that a classical approach will help students reach the next level. The Academy will focus on having good relationships with parents, so teachers can understand the unique and/or challenging situations of their students. There will be after-school tutoring help provided by teachers along with interventions in the classroom when necessary. The Core Knowledge Foundation has provided suggestions for teachers with the RLA curriculum to assist struggling readers. The Academy will look to follow the success of rural and poor Bogalusa, Louisiana who implemented Core Knowledge to much success. They now see 95% of their students hitting their benchmarks.

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.*

Operational Goals:

Goal 1:

The Academy will have an average attendance rate of 90%.

Goal 2:

The Academy will retain an average of 85% of our students through the first year and 90% in the years following.

Goal 3:

The Academy will conduct a Parent Satisfaction Survey twice a year and achieve a satisfaction rate of 85% year one, 90% year two, and 95% thereafter.

Financial Goals:

Goal 1:

The Academy will have a cash reserve at end of year three of \$250,000.

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Goal 2:

The Academy will make finances of school transparent by putting the final financial report on website not less than annually.

Goal 3: The Academy will receive an unqualified auditors opinion on our financial statements every year with no material findings.

Academic Goals:

Goal 1:

The Academy, beginning in year 2, will exceed the READY EOG (Proficiency) results of the three Monroe elementary schools (East Elementary, Benton Heights Elementary, Walter Bickett Elementary), exceed it by 4% points in year 3, by 6 points in year 4, and by 8 points in year 5.

Goal 2:

The Academy will meet EVAAS growth in year 2 and 3 and exceed growth in year 4 & 5 forward.

Goal 3:

Students in grades 2-5 will demonstrate their understanding of citizenship each year by volunteering or attending a civic event and producing a report of project of what they've learned.

Governance Goals:

Goal 1:

The board will meet a minimum of 10 times a year and have an 80% cumulative attendance rate or higher.

Goal 2:

The Academy will not receive a non-compliance violation letter from the Office of Charter Schools.

Goal 3:

Every board member will receive a minimum of 8 hours of group, in-person governance training each year.

Communication to the Board, Parents, Teachers, Students, and Stakeholders:

The principal will prepare all academic and operational goal reports to the full board. Depending on the specific goal, the Academic Committee or School Improvement Team may review the report and then offer recommendations if needed. All financial reports will be prepared by the treasurer and our LINQ service provider, then presented to the Financial Committee for a full evaluation and recommendations. All recommendations will be discussed and voted on by the full board. Parents, teachers, students, and stakeholders will all be notified when the reports are presented to the full board.

Please see Appendix O for complete details on how the Academy plans to achieve each goal presented.

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

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The school-wide goals have been designed to measure the pillars of the Academy's mission: a rigorous classical education, a focus on citizenship, an enthusiastic staff, and parental and community involvement. The board will be made aware of the school's progress toward meeting its goals through periodic reports from the School Improvement Team, monthly reports from the principal, testing and survey data, and an annual report prepared by the principal. Given all of the data available to it, the board will get a clear picture of how well the school is working towards meeting its school-wide goals which will be a reflection on how well the school is meeting its mission.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Explain expectation of higher minority representation with no weighted lottery?	Joe Maimone	Educational
How will having to members that are fluent in Spanish break the underrepresented Hispanic population in charters across the state if the applicant is proposing a core knowledge foundation school? Currently, there are 27 CFA schools in the state of North Carolina according to the CFA website five CFA schools are in the Charlotte Monroe area? How will this proposed mission aligned with the target population of Hispanic students if it has not attracted Hispanic students already?	Walter Finnigan	Educational
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
Please elaborate on what you mean when you state "the Academy's approach is more back-to-basics."	Jessica Kelly	Educational
The mission does not state at risk students. The increased learning opportunities are addressing at risk students and academically gifted students this is not addressed in the mission statement.	Walter Finnigan	Purposes of
How will you measure the goal of good relationships with parents?	Shaunda Cooper	Purposes of
Goals could be even more specific.	Alex Quigley	Goals for th
How will you ensure you are meeting the citizenship part of your mission? What do you mean by unqualified auditor? Why wouldn't you want a qualified auditor to review your records?	Shannon Sellers	Goals for th
Concerned about Financial Goal 3; why would you receive an unqualified auditors opinion on your financials?	Jessica Kelly	Goals for th

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

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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.

The Academy is committed to meeting the needs of every student in the county and surrounding areas. The Academy's instructional program will be anchored by the Core Knowledge sequence, a classical approach to education. The Core Knowledge sequence is a detailed outline of specific content, aligned with the North Carolina State Standards. By offering a challenging back-to-basics approach to education, our targeted demographic will be able to spend time building that bank of knowledge and receiving the help they need along the way, whether it be a modified/scaffold down approach, after-school tutoring, or taking picture walks. The cross-curricular pedagogy with content alignment across disciplines brings strength to the curriculum.

The Academy will support the Core Knowledge sequence with the Core Knowledge Language Arts Program, Core Knowledge Science, Core Knowledge HGCA (History, Geography, Civics & the Arts), Saxon Math, and Shurley English. Additional special classes in art, music, and physical education will also be offered. Anson Charter Academy will support its English Language Learners through Shurley English's "Stepping Stones to English." This four-phase ELL supplement will complement the Core Knowledge Language Arts and Shurley English programs. Additionally, to support the Academy's commitment to citizenship, the Academy will adapt a K-5 (elementary school) version of Heroes vs. Villains.

The Academy's board has chosen to use Core Knowledge's Language Arts Program. There is a specific K-3 curriculum and a 4-5 curriculum. The K-3 Language Arts Program is broken up into two strands, the Skills Strand and the Listening & Learning Strand. The Skills Strand has students learning reading and writing together, building language skills and being able to translate that onto paper through spelling (spelling words). The Listening & Learning Strand focuses on comprehension. So, while students are learning how to read and spell, the Listening & Learning Strand allows students to understand the meaning of these words. The 4-5 curriculum focuses on the mastery of the skills learned in grades K-3. The Academy will use DIBELS to assess student progress.

Core Knowledge HGCA is pulled from the Core Knowledge Foundation and aligns perfectly with the sequence. Heroes & Villains will complement the civics curriculum as students will learn about American figures through time, their contributions to society, and virtues espoused. The Academy will also use the Core Knowledge Science curriculum. They provide direct alignment and

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cross-curricular opportunities.

The Academy has chosen to use Saxon Math (recommended by the Core Knowledge Foundation). Saxon Math continually reinforces previously mastered concepts. There is a reduction in knowledge gaps through the spiraling of instruction as students are continually using previous knowledge to master new concepts.

Shurley English will be used to teach students the basics of grammar, syntax, and sentence structure. The Shurley method engages students through songs and jingles, but is structured to provide a coherent approach to the subject, ensuring continuity of instruction. This will act to support the Core Knowledge Language Arts curriculum.

Teachers will be able to use many methodologies, allowing teachers to use best practices and teach with confidence. Using a variety of teaching techniques will help reach each student in the way that he or she learns best. Teaching methods that CCS teachers may use include but are not limited to direct instruction, experiential learning, collaborative learning, and directed independent study.

To aid in the evaluation of student performance and competencies, we will administer the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) two or three times per year for students in grades 2-5. For grades K-1, we will administer the NWEA MAP for primary grades. The Academy will also administer the EOG's at the end of the year.

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.

Monroe Charter Academy's learning environment will be traditional, in keeping with its classical design. Students in K-5 will be taught in self-contained classrooms with one teacher per class. Kindergarten will have four classrooms consisting of 18 students each. Grades 1-5 will have 24 students per classroom (three classrooms in each grade).

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.*

The Core Knowledge sequence and the curricula that supports the sequence aligns with North Carolina's State Standards. The Core Knowledge Language

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Arts Program meets all the foundational reading skills standards set by the state. The Language Arts curriculum (as mentioned above) provides tools that stretch across North Carolina's standards in getting students to understand text, structure sentences, and being able to compare and contrast (just a few examples). Saxon Math is not only aligned with the Core Knowledge Sequence, but it also aligns with North Carolina's State Standards. From kindergarteners learning about shapes, to fifth graders diving into fractions, Saxon Math provides a rigorous approach where students build upon the concepts learned. This aligns with the proposed mission by providing a rigorous classical education.

The Heroes & Villains curriculum aligned with the Core Knowledge Social Studies will seek to fulfill our mission in developing academically thriving citizens. A citizen is not just an inhabitant of a country, but someone who actively participates and understands the people who have greatly impacted our country. The curriculum will explore Thomas Jefferson, his impact on society by writing the Declaration of Independence, to Benedict Arnold's betrayal of America. In understanding what it means to be a citizen, students will have the opportunity to engage with community leaders, small business owners, and also the average resident, to see how they can impact society as a citizen.

The Core Knowledge sequence aligns with our targeted student population through other major successes in similar communities. Bogalusa, a rural, majority-minority town in Louisiana adopted the Core Knowledge curriculum to much success. Over 93% of the schools' population were eligible for free or reduced lunch and had been struggling academically. Bogalusa and the Academy's populations are very similar and has acted as a case study for our board. The alignment is there and the board will ensure that the implementation goes smoothly.

- 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.*

While the content and sequence of Core Knowledge is regimented, it lends itself to a wide variety of instructional methodologies that will allow teachers the freedom to use the method that best reaches each student. Academy teachers will use a variety of instructional strategies including but not limited to direct instruction, Socratic method, experiential learning, collaborative learning, and directed independent study. Teachers will also receive training in classroom differentiation and best practices for remediating students who are struggling.

Core Knowledge provides resources for teachers to help them address the needs of students with a wide range of differences and abilities. Teacher will also receive extensive professional development in instructional methods, allowing them to adjust their lesson plans and instruction to ensure each student's success.

Specifically, Core Knowledge Language Arts now offers an online guide for at-risk students, how to approach different parts of the sequence. We will also encourage teachers to attend the Bill of Rights Institute's fall and spring professional development seminars as well as their summer Socratic

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seminars to master the implementation of Heroes & Villains, as well as the social studies curriculum.

These trainings will help teachers deliver a more effective product in the classroom, leading to greater academic growth. The Core Knowledge trainings/professional development is proven and provides the tools teachers need to work with struggling students. The Bill of Rights Institute professional development helps teachers understand the tough topics to teach, gives them the tools to scaffold down when needed, and introduces ways to get more students engaged in learning about American history.

As a board, we have worked with other charter school professionals to advise and mentor the board on its Instructional Plan. We thank Kirby McCrary (Headmaster of Millennium Charter Academy) for his guidance on Core Knowledge and serving North Carolina's rural populations.

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

The Academy will use multiple strategies to ensure that each student will be prepared to transition to the next grade level.

1. A comprehensive, coherent curriculum will be used with fidelity, along with common planning in PLCs and common assessments across the grade levels. While students will still have a wide range of abilities and competencies, they will arrive at the next grade level having been exposed to the same, predictable material, giving teachers a more complete picture of what the students already know at the beginning of the year.

2. A multitude of assessment strategies will be used to gauge student learning and adjust instruction throughout the course of the year. Students will be given the NWEA MAP two or three times per year; teachers will use frequent formative assessments throughout lessons to inform daily instruction; and grade level teams will plan together and use common assessments, analyzing data in PLCs, to improve instruction and student learning.

3. Strategies will be in place to identify and remediate students who are struggling. Teachers will provide individualized tutoring at specified times before and after school. Parent volunteers will be used to encourage and help students by providing classroom assistance during group or center time. Students who are identified as at risk for academic failure will have a Personalized Education Plan (PEP.)

4. Students who need more than a little help will be referred to the School Support Team by teachers, parents, or other staff. The SST will work with each referred family to get help for each student in order to reach his or her potential through classroom interventions, alternate instructional strategies, referral to contracted specialists, or referral to the Exceptional Children team.

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

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

The Academy's calendar aligns with the proposed mission and education plan by providing the necessary time to teach the Core Knowledge Language Arts and the Heroes & Villains citizenship curriculum. Our mission specifically mentions developing each child into an academically thriving citizen, so our calendar provides enough time to teach citizenship (added onto the social studies curriculum). The school day runs from 8:00am to 3:15pm, Monday through Friday. The calendar provides the right number of professional development days for Core Knowledge, Saxon Math, and Shurley English. It also allows enough teacher workdays for teacher conferences with parents. The calendar goes for 1035 hours and 179 days.

Special Programs and "At-Risk" Students

1. *Describe the methods and clear systems of prevention and intervention teachers will utilize to provide assistance to students that are not performing at expected levels: ensuring continued progress and academic student growth.*

The Academy will employ multiple strategies to ensure the success of all students. These strategies include simple modifications to the learning environment, increased parent communication regarding simple interventions, intervention by the School Support Team (SST), and possible referral to the EC teacher. The Academy will implement a three tiered plan to ensure struggling students receive the help they deserve.

When a teacher recognizes that a student is struggling, that teacher will communicate with the student and notify the parents to make some adjustments in the classroom. This could be something as simple as moving the student's desk to the front of the class.

Tier 1: If the student continues to struggle, the teacher will schedule a meeting with the parent/ guardian and discuss what possible interventions are needed. Teachers must not skip this step and must communicate these issues with the parent. Teachers will be strongly encouraged to use both email and telephone to communicate with parents about these issues. We will make sure that teachers document each step they've taken to assist the student in the process. To ensure that this is an effective form of communication, teachers will be asked to submit their documentation if struggles continue.

Tier 2: If a student continues to struggle in the classroom, the teacher or parent may refer the student to the School Support Team. The School Support Team will be made up of a representative from our contracted EC services team and a fellow teacher. The teacher who refers the student to the SST will stay involved and help the team develop the appropriate intervention plan after a full evaluation of the student's abilities. The student's teacher must present all documentation of the classroom struggles and minor interventions to the other members of the SST. From there, the team will develop an appropriate intervention plan that can maximize the student's potential. The parent or guardian must sign off agreeing to the intervention plan. Teacher Assistants will provide support when needed for a student's

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intervention plan and make sure it is implemented properly.

Tier 3: If those interventions do not prove effective, the student will then be referred to the EC teacher to be evaluated for EC services.

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.*

A home language survey will be requested from every student at the beginning of each school year. ELL students may be identified by the survey or by classroom teachers or other school personnel.

When possible and appropriate, the ELL teacher (through contracted services) will use Stepping Stones to English: ELL. This instructional program uses the Shurley method through a four-phase program. The first phase introduces the Shurley Method (being used through Shurley English) in the student's first language. By introducing the student to the Shurley Method in their first language, a student can grasp the instruction. The second phase introduces a bilingual approach, where English is being eased into the student's vocabulary via the Shurley Method. Phase three is an intensive transition to English and phase four, the student is fully emerged in English, still receiving assistance when needed by the ELL teacher. Through these phases, the student will only be pulled out of class when needed. The ELL instructor will be able to assist the student in class along with the lesson. Some students may enter the program at different phases depending on their proficiency.

The Shurley Method utilizes spiraled instruction, constantly reinforcing grammar skills, which aligns with the Core Knowledge Language Arts and Shurley English.

The ELL teacher will monitor the progress of each student through a weekly or bi-weekly report (depending on the phase) on the student's progress. Parents will be notified of the student's progress, especially when that student has entered a new phase or is exiting from the program. When a student is exiting from the program, we will ask for a parent to sign off, recognizing the successful completion of the program.

3. *Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*

- a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
- b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

The Academy's curriculum is challenging and carefully designed to provide students with a solid foundation of knowledge and skills necessary for future success. Though the rigorous instruction will adequately meet the needs of many gifted students, should students need a greater challenge,

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teachers will have the knowledge and flexibility to differentiate instruction to meet the needs of those students. Because the content and sequence of the Core Knowledge sequence is so important, even students who may be performing high above grade level will not be allowed to miss content. Instead, teachers will design lessons and assignments so that intellectually gifted students can be challenged while benefiting from the shared knowledge and experience of their peers. Strategies such as supplemental reading materials, challenge spelling words, individualized reading goals, and engaging projects will help students achieve academic growth no matter what level they are on.

The spiraling nature of the Saxon Math program makes it well suited for acceleration. Starting in 3rd grade, high achieving students will have the opportunity to accelerate their math and advance to the next grade level. This opportunity will ensure that the most gifted math students are challenged, without sacrificing a firm foundation of math skills. All students' progress will be assessed and monitored using a variety of methods, including the NWEA MAP, NC EOGs, and grade level common assessments. The teachers and principal will be held accountable for the growth and success of each student, and the School Improvement Team and the Board of Directors will continuously monitor the growth and achievement of different groups of students, including high performing students.

Exceptional Children

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

Identification and Records

1. *Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.*
2. *Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed.*
3. *Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed.*
 - a) *Requesting Records from previous schools*
 - b) *Record Confidentiality (on site)*
 - c) *Record Compliance (on site)*

As part of the enrollment packet that every student will be required to complete, parents will have the opportunity to provide confirmation about their child's existing IEP or 504 plan. Additionally, EC staff will examine all records from previous schools as they are received to determine if enrolled students have existing IEPs or 504 plans. Upon identification of students with existing IEPs or 504 plans, Academy staff will alert teachers and administrators and ensure compliance with any existing plans.

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To help identify students who may be eligible for special education services, a School Support Team (SST) will be established. The SST will be made up of teachers and a representative from our contracted EC services. Students may be referred to the SST by administrators, teachers, or parents. Once referred, the SST will make a preliminary evaluation and, with the support and agreement of the parents, make recommendations for either research-based classroom interventions or further formal evaluation. The formal evaluations may be conducted by EC staff or qualified personnel contracted for such purposes. If classroom interventions put into place are found ineffective, the SST will re-evaluate and either put new interventions into place or determine if the student's needs will be best served by an IEP or other special education services.

At all stages of the process the student's parents will be informed and consulted. The SST will continue to monitor all students determined to have special needs or need special assistance until such time as they are determined to no longer need special services. All student records will be maintained with confidentiality and safety in mind. Records will be kept in secure, designated, locked records rooms, in fire-proof file cabinets. Student records may be examined on site only by approved personnel and should never be taken off site. A staff member will be designated by the principal to oversee the student records and ensure compliance with all applicable laws. Records will be requested from the student's previous school only after a complete enrollment packet has been received. Upon receipt, student records will be securely stored and treated with strict confidentiality.

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.*

The Academy is committed to meeting the needs of all enrolled students. It will be our policy that every child have a fair and full opportunity to reach his or her full potential and that no child shall be excluded from appropriate educational offerings. To ensure that the needs of exceptional children are met, the Academy will have an Exceptional Children Department staffed with licensed, highly qualified, well-trained EC teachers. The EC department will be tasked with the screening of all students referred by the School Support Team (SST.) The EC department will further be responsible for developing educational plans and strategies for special needs students.

The EC department will take every reasonable measure to prevent denials of equal educational opportunity on the basis of physical, emotional, or mental handicap; and will assure that the rights of students with special needs and their parents or guardians are protected. The staff of CCS will be aware of students with an Individual Education Program (IEP) or a Section 504 Plan and make sure that all requirements are being met as prescribed. The IEP will be updated regularly and adjustments will be made to accommodate each

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student. An EC teacher, classroom teacher, parent, and administrator will be given proper notification and invited to attend all meetings. There will be ongoing assessments in classrooms to identify students with special needs.

Students with a Section 504 Plan or identified as being eligible for a 504 plan will be offered accommodations and or services for the identified disability. Accommodations and services for both IEP and 504 plans will include but not be limited to: modification of tests and assignments, supplemental textbooks, adjusted seating, use of study guides and organizational tools, preferential seating, modified recess and PE, and use of necessary health care procedures.

The school plans to contract for related services such as speech-language, occupational therapy, and physical therapy with a company that has a proven track record and extensive experience with providing EC services to charter schools.

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.*

The Academy will set high expectations for the students, staff, and the school as a whole. The student performance goals are:

Goal: The Academy will meet EVAAS growth in year 2 and 3 and exceed growth in year 4 & 5 forward.

The Academy will attain this goal through the NWEA MAP testing (three times a year), grades 2-5 and ensuring progress through a report three times a year to the Academic Committee from the principal. The principal will also share the progress with the School Improvement Team. The Academic Committee and the School Improvement Team will then have the opportunity to make any recommendations to the full board on improvements. Once the board is notified, the Academy will notify parents and students on the results in relation to our goal.

Teachers will use individual student data from the NWEA tests to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their Professional Learning Communities (PLCs) to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT will use school-wide testing results to make recommendations to the board about school-wide initiatives and programs designed to address deficiencies.

Goal: The Academy, beginning in year 2, will exceed the READY EOG

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(Proficiency) results of the three Monroe elementary schools (East Elementary, Benton Heights Elementary, Walter Bickett Elementary), exceed it by 4% points in year 3, by 6 points in year 4, and by 8 points in year 5.

This goal will be measured by the End-of-Grade assessment required by the state of North Carolina once a year. The metrics that the Academy will use to attain this goal is the NWEA MAP testing for reading and math (three times a year). We will also be measuring fluency through DIBELS to ensure that students are able to take these tests with confidence. The principal, with the assistance of the Office Manager will report the results of the NWEA testing to the board's Academic Committee three times a year. The board will then notify parents of their own child/children's results and the Academy's progress as a whole. The Principal will report the results of the End-of-Grade assessment to the full board. Once the board is notified, the Academy will notify parents and students on the results in relation to our goal.

Teachers will use individual student data from the NWEA and DIBELS tests to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their Professional Learning Communities (PLCs) to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT will use school-wide testing results to make recommendations to the board about school-wide initiatives and programs designed to address deficiencies.

Policies and Standards for Promoting Students:

Students who meet or exceed the state standard requirements, where they exist, and have met all of the grade level requirements will automatically be promoted to the next grade. Third grade students must meet the state reading requirements and End-of-Grade assessments. If a student is at risk of being retained, the student's classroom teacher will contact the parents as soon as possible. The teacher, parents, and other necessary staff will formulate a personal education plan which may include a referral to the SST. It will be the policy of the Academy to give each student the tools and support that he or she needs to be successful. If the interventions and support do not result in the student meeting the requirements to be promoted to the next grade, the principal, with input from the teacher, parent, and other involved staff, will make the final decision on whether or not to retain the student.

If a student has either an IEP or a 504 plan, the decision to retain or promote that student will be made with the support of the EC staff and consideration will be given to the student's plan and accommodations. All of the school policies and procedures, including promotion and retention policies, will be available to parents and students in the student handbook and on the school website.

Exit standards will be based off the Academy's promotion standards. In addition to meeting those requirements, students should pass to End-of-Grade assessment and meet all attendance requirements. Students who are at-risk will receive accommodations allowed lined out in their personal education plan.

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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.*

It is the goal of the Academy to provide a safe and orderly environment for students, parents, and staff. To this end, we will set high behavior expectations for each student. Teachers will formulate, communicate, and model clear behavior expectations based on the idea that everyone should show kindness and respect. School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced. The disciplinary process will consist of four levels:

Level 1: Most instances of misbehavior can be addressed by the classroom teacher and every teacher will receive training in classroom management and strategies to address inappropriate or disruptive behavior. Teachers will keep parents informed if their student's behavior is not meeting expectations. If misbehavior persists or rises to a Level 2 offense, then the classroom teacher will refer the student to the administration. Examples of Level 1 behavior include but are not limited to talking out of turn, refusal to participate, not cleaning up after making a mess.

Level 2: Repeated Level 1 behaviors or more serious misbehavior will result in a referral to the principal. The principal will meet with the student and parents to formulate a corrective action plan that may include disciplinary measures. Possible consequences of a Level 2 offense include but are not limited to after school detention, in-school suspension, writing reflections, and suspension from extra-curricular activities. Examples of Level 2 offenses include leaving class without permission, disrespect of authority, and non-compliance with dress code.

Level 3: If Level 2 misbehavior persists in spite of the corrective action plan or are more serious, the principal will meet with the student and the parents and formulate a corrective action plan that may include an out of school suspension of no more than 10 days. Examples of Level 4 offenses include disobeying school personnel, cheating, stealing, harassing others, and destruction of school property.

Level 4: If corrective action plans do not result in adjusted behavior, or

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if the misbehavior rises to a Level 4 offense, the principal will meet with the student and the parents and may recommend long term suspension or expulsion. Examples of Level 4 offenses are possession of drugs, threats to others, possessions of weapons, and assault. A parent may appeal a Level 3 or Level 4 disciplinary action by submitting a written notice of appeal to the principal within 24 hours of being notified of the action. The principal will immediately notify the Board of Directors who will schedule a meeting to hear the appeal. The parents will be notified of the date, time, and place of the meeting and requested to attend. The decision of the Board regarding appeals of disciplinary measures will be final. When considering discipline of students with special needs, the principal, with the help and consultation of the EC teacher, will review the student's file including his or her IEP or 504 plan. The principal will take into account any accommodations or interventions in place and whether or not the misbehavior is a manifestation of the student's disability, and work with the parents to ensure that all of the student's rights are protected.

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Section III: Education Plan Concerns and Additional Questions		
What is the relationship between Anson Charter Academy and Monroe Charter Academy? Anson Charter Academy is mentioned in the application regarding ELL students. Who are CCS teachers that are mentioned in the following sentence? "Teaching methods that CCS teachers may use.."	Shannon Sellers	Instructiona
Is the title of the school "Anson Charter Academy" or "Monroe Charter Academy"? There may be a typo midway through the second paragraph.	Robert McOuat	Instructiona
Anson Charter Academy is mentioned in Paragraph 3. How is that school related?	Jennifer Gnann	Instructiona
Where is the curriculum outline? Saxon Math - what is the research on this program and it's alignment to the common core?	Alex Quigley	Curriculum a
How does the curriculum framework differentiate for the at-risk students and the academically gifted students mentioned in the earlier section of the application?	Walter Finnigan	Curriculum a
10 workdays prior to start of school year is excessive in comparison to the 2 at the end of the year; will this be enough time for teachers to close out the year especially with the testing occurring until the very end of the year?	Jessica Kelly	Curriculum a
adequate	Joe Maimone	Curriculum a
Testing should occur the last 10 days of school according to current testing policy. Your calendar only allows for 9 days of testing. Will 2 days of workdays at the end of the year be enough to close out the year?	Shannon Sellers	Curriculum a
adequate	Joe Maimone	Special Prog
Just because a student struggles, doesn't necessarily mean he/she needs a referral to Exceptional Children. There is not mention of WIDA testing or ACCESS testing for ELL. Applicant should review ELL state policy.	Shannon Sellers	Special Prog
The child find section for exceptional children is very vague. The applicant should review requirements and address items such as 90 day rule. Formal evaluations should be conducted by a psychologist not an EC teacher. 504 implementation should also be reviewed and elaborated upon.	Shannon Sellers	Exceptional
adequate	Joe Maimone	Exceptional
How will the community be aware of the schools Child Find obligations? Who has access to the child's confidential records?	Robert McOuat	Exceptional
How does school decide who needs related services? How will school provide full continuum of special education services delivery? "The application indicates "The EC department will take every reasonable measure to prevent denials of equal educational opportunity ..." - Since students needs are met tin the general classroom setting as well, shouldnt oversight of inequality be a general supervisor requirement by the school administrator?	Robert McOuat	Exceptional
Who are, "The staff of CCS will be aware of students with an Individual Education Program (IEP) or a Section 504 Plan." Will you be hiring outside help for IEP's and and 504's? What type of classroom assessments will be given to help identify exceptional children? Low performance doesn't necessarily indicate a disability. What do you mean by the "IEP will be updated regularly?" Law requires it be updated yearly. What services will The Academy provide for exceptional children? Will you provide inclusion?	Shannon Sellers	Exceptional
adequate	Joe Maimone	Exceptional
clear and measurable goals	Joe Maimone	Student Perf
What academic goals are set for year 1? Other than state requirements, what will be the requirements for promotion and retention?	Shannon Sellers	Student Perf

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adequate	Joe Maimone	Student Cond
What is the time frame of the appeal process?	Jessica Kelly	Student Cond
What is the reasoning behind having writing as a consequence?	Jennifer Gnann	Student Cond
Overall I believe this is a low pass. It meets the criteria but is fairly boilerplate and not unique in it's design.	Alex Quigley	Student Cond
How will you determine which consequences are given for level 2? In order for consistency, this policy should be reviewed.	Shannon Sellers	Student Cond

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

Mailing Address: 2132 Greenbrook Pkwy

City/State/Zip: Weddington NC 28104

Street Address: 2132 Greenbrook Pkwy

Phone: 704-236-1234

Fax: 704-846-5098

Name of registered agent and address: W. Edward Goodall
2132 Greenbrook Pkwy.
Weddington, NC 28104

FEDERAL TAX ID: 81-3838227

Tax-Exempt Status 501 (c)(3)

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

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

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

Please complete the table provided depicting the initial members of the nonprofit organization.

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these
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					professional licenses?
Melissa Davis	Treasurer	ANSON	Quality Assurance Coordinator NCVPS		
Willie Owens	Member	ANSON	Principal		
Brian Johnson	Vice Chair	ANSON	Self Employed Farmer		
Carmelina Brockmann	Secretary	UNION	PTO Leader		
Jim Stegall	Vice Chair	UNION	Adjunct Instructor , Political Science , Wingate U.		
Eddie Goodall	Chair	UNION	Goodall Consulting , Charter Financial Services		
Anthony Rodriguez	Member	Out of State	Student Programs Mgr. Bill of Rights Institute		

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.*

Governance of the school is the direct responsibility of the Monroe Charter Academy Board of Directors, whose paramount goal is the educational success of its students. The Board will ultimately be responsible for all transactions of the charter school including financial management, personnel, academic program, and facilities. The Board will be composed of 5 to 13 members, with a goal of at least one Board member being a parent or guardian of an Academy student.

The Academy Board will provide direction via policies to the principal who will be responsible for the day to day operation of the school. The Board will form work committees which, in cooperation with the administration, will set policies and develop programs and procedures that are in line with the school's mission and designed to meet the school-wide performance goals.

Each Board member will be expected to fully participate in the governance of the Academy. Each board member will sign a conflict of interest statement and a board commitment statement. Each board member will support the school

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by serving on at least one board committee, participating in school events and activities, and reviewing board materials. They will receive formal training regarding North Carolina charter related statutes, the Open Meetings law, State Board policies, and Office of Charter School directives, while acting in the best interest of the students and the school.

The personnel committee will be tasked with conducting an exhaustive search for the school principal. The job opening will be posted for a minimum of 30 days on such websites as the National Association of Secondary Schools, K12 Job Spot, Ed Week, School Spring, and college and university placement centers. The committee will look for a candidate who, above all, will share the mission and the vision for the Academy. The personnel committee will also develop an evaluation process for the principal and submit to the full board for approval. Once the Board formally hires a principal, the board will evaluate the principal annually using the evaluation tools and processes that have been adopted by the board.

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

The board of the Academy will be comprised of 5 to 13 members. There are currently 7 members. After enrollment starts, a parent should be added to the board to support the parental partnership that is a critical piece of the Academy mission. Each board member has knowledge and experience that will be beneficial to the governance and long term success of the school. The founding board includes community members with expertise in charter and district school education, finance, accounting, facilities, politics, human resource management, governance, fundraising and marketing. The board is diverse with ages from 30 to 70, with gender, and with ethnicity, including Hispanic, White, and African American members. Most importantly, all of the board members share a passion for education, a devotion to the mission, and a common vision for Monroe Charter Academy.

Of the founding board members Eddie Goodall, Jim Stegall, and Anthony Rodriguez all have extensive charter experience. Goodall and Stegall were founding members of Union Academy, and Goodall was a co-founder and Treasurer of a new charter, Union Day. All three worked for the NC Public Charter Schools Association (NCPCSA). Carmelina Brockmann, Melissa Davis, and Willie Owens are educators, with the latter being an Anson County Elementary School Principal. Brian Johnson is a farmer who experienced the pain of watching young people waste their lives in the prisons he worked in.

To ensure the academic and operational success of the school, the board will work together to make organizational and policy decisions. The board will be ultimately responsible for all operations of the charter school, but will delegate the day to day operations to the principal. To ensure that the best possible decisions are made, the board will participate in continuing board development and use proven best practices.

The board will gather information from a variety of sources including the

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School Improvement Team, the Parent Teacher Organization, the administration, and surveys of parents, students, and staff. The board will get regular reports from the principal and the board committee that will keep them informed about all areas of school performance and will be used to help them make decisions.

The board personnel committee will develop an evaluation process for the principal that includes multiple performance indicators and is closely tied to the school's mission and goals. Based on the evaluation process, the board will formally evaluate the principal each spring. The principal's contract and compensation will be based at least in part on the annual evaluation.

Parents, staff, and students will have a variety of avenues to be active participants in the decision making process. There will be a public comment period at every regular board meeting and stakeholders will serve on board committees, the PTO, and the SIT. There will be a culture of trust and transparency. Stakeholders will sense ownership in the school.

All stakeholders will be invested because they made a choice to, the key component of a charter school. Choice inspires happiness and also a desire to make that choice look wise. We expect all the stakeholders to be inspired, to "up their game," to increase their respective individual efforts to make Monroe Charter Academy as a whole, to be an educational and operational success.

- 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?*

Brian Johnson, an Anson County School Board member, conceptualized first, Anson Charter Academy. Brian discussed the idea of a charter in Anson with Representative Mark Brody (Union-Anson) and Willie Owens. Then Rep. Brody contacted Eddie Goodall and asked him to call Johnson and encourage him to apply. Goodall did and Johnson said he'd need help and invited Goodall to a meeting with himself, Brody, and Owens.

Goodall left that meeting indecisive as to his role but later, when discussing the idea with a former employee, Anthony Rodriguez, the latter asked to be involved despite living in the Washington, DC area. Rodriguez had been the Director of Advocacy for the NC Public Charter Schools Association under Goodall. Goodall agreed to head the effort on the conditions that Rodriguez help with the application and getting the school open successfully, and that the same Anson group add some Union County members and apply to open two schools, with one in the Wadesboro area and Monroe Charter Academy.

Goodall had recognized that one South Piedmont Community College (SPCC) board of directors had operated successful community colleges in both Monroe and Anson County since 1999. Goodall discussed the concept with the SPCC president, (and former President of Wingate University) Dr. Jerry McGee. Goodall pointed out that there were operational and governance efficiencies of scale with one board, especially since both prospective schools would be small. In addition, one board oversees four NC charter schools already.

This idea was presented to the Anson participants above and to Rep. Brody

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and they agreed that the idea made business sense and that the targeted demographic, both in towns reeling from out migration, would be very similar.

Rodriguez then asked his friend, Carmelina Brockmann, a Union County resident who had been involved in an earlier effort for a Union County charter that had failed to apply, and she agreed to serve. Goodall then knew of Jim Stegall's (of Monroe) long time interest in a Monroe charter that would serve the at-risk students and invited him to be on the board. Needing another Anson member Goodall had discussed charters for years with Melissa Davis of Wadesboro, who is a Quality Assurance Coordinator for the NCDPI's Virtual Public School (NCVPS) and she enthusiastically agreed.

In addition to at least one parent being added later, the board will assess its progress and needs and presently would consider adding first, an attorney, and then another person with an accounting/finance background.

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

The board will meet monthly, ten months per year. The annual planning meeting will be in each June before the opening of school.

The board will meet at least monthly until the application is approved and then would likely meet semi-monthly during the planning year and RTO process.

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.

New board members will be required to participate in the board's Orientation Plan. Key points of the plan include a primer on the charter contract, charter law, SBE TCS-U policies, open meetings law, and public records law; attending at least one school community event; and observing in a classroom. Board members will be expected to participate in ongoing board development. The board may use a combination of training provided by the Office of Charter Schools, the NCPCSA, books, professional development coaches, and annual board retreats. A specific requirement for hours of board development for each board member will be laid out and agreed to in the Board Commitment Letter that each board member will sign.

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.

Monroe Charter Academy board members have a fiduciary responsibility to the school. They avoid or disclose conflicts of interest, and act in an ethical manner that credits the board, the school, and the staff. Each board member will be required to sign a conflict of interest statement and annually disclose any conflicts or potential conflicts of interest.

When a conflict of interest occurs or may even appear to occur, the affected board member should advise the board before any vote or even discussion of the issue. Also, other board members have the obligation to bring before the board any potential conflicts even if the issue involves another board

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member. If, in the board's opinion a conflict exists, then the member affected shall not participate in any discussion or vote on the matter in question.

We define a conflict of interest as a condition that exists when circumstances create, or are perceived to create, a risk that judgment or actions by a person or entity, regarding their interest in the Academy, will be unduly influenced by a secondary interest of that person or entity. Interests may be pecuniary, professional, personal, or any interest that affects judgment or action.

To avoid conflicts and to mitigate conflicts the board will ensure that its policies and decisions do not enhance the possibilities of conflicts. We will recognize the items in our charter contract and state law involving board relationships, nepotism, and those staffing relationships. We'll also work closely with our accountants and auditors to maintain internal controls and policies reflecting best practices in this area.

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

The Academy board will use a variety of information to aid the decision making process and policy development. New board policies, or revisions of existing policies will start in the appropriate board committee. If the policy does not originate in the governance committee, then the committee recommendation will then go to the governance committee. The governance committee will make a recommendation to the full board about whether a new policy is needed and what it should contain.

In making decisions, the board may consider recommendations from the administration, School Improvement Team, PTO, and board committees. Because important stakeholders are involved with all of these bodies, the board will effectively be getting input from all of the stakeholders. The board may also look at data including test scores, survey results, student performance statistics, community service performed, suspension rates, and reportable incident rates.

Before being finalized and implemented, new board policies will be made public and the board will solicit input from parents and staff. The board will carefully consider any input received before voting on any new policies.

Lastly, the board will encourage a board (and school) culture that allows for missteps. We believe that only by taking chances can one take larger and bolder strides, thus moving more efficiently. Board members will be encouraged to suggest creative ideas, vote independently, and be comfortable with board decisions that may not be unanimous or in their favor. This will make a healthier board and public charter school.

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.

The Academy will have a couple of important advisory bodies that will help the board in the governance of the school.

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SIT: The School Improvement Team will be led by the principal and include other administrators, teachers representing each grade level and department, one board member, and at least two parents. The SIT will be responsible for developing and recommending amendments to the School Improvement Plan on an ongoing basis. They will meet at least once per month. The SIT will analyze, collect data, and make recommendations to the board in all areas of instructional programs, practices, and procedures.

PTO: The Parent/ Teacher Organization will operate as a separate organization sanctioned by the board. The PTO will consist of parent officers, committee chairmen, the principal, assistant principal, and three teacher representatives. The PTO will help oversee and facilitate extracurricular, recreational, social, and community service activities of the school. Both the SIT and the PTO will work collaboratively with the principal and school community and give monthly reports to the board of directors.

Kirby McCrary, Headmaster of Millennium Charter Academy, Erin Kirkpatrick, Chair of Union Day School, and Dr. Emily Orr, founder of Longleaf School of the Arts, have agreed to serve as volunteer advisors, serving in mentor roles, for the planning year through the successful opening of the school.

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

The staff grievance process, as outlined in the staff handbook, first calls for the staff member to bring up any problems with his or her immediate supervisor. If the issue is not resolved, the staff member will then outline the problem in writing and submit it to the principal. If the principal does not resolve the issue to the staff member's satisfaction, an appeal can be made to the personnel committee of the board. If the staff member is not satisfied with the results of the personnel committee, he or she may request a hearing of the full board of directors.

The grievance process for parents is similar, and will be outlined in the student handbook. The parent must first take the issue to the staff member with whom the parent or student has an issue. If the issue is not resolved, a formal, written grievance may be submitted to the principal. If the principal is not able to resolve the issue, the parent may request a hearing before the full board of directors. At the hearing, the parent and/ or his or her representative will be given a chance to present the grievance.

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.*

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(Appendix H)

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

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

X Not Applicable

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

X Not Applicable

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

X Not Applicable

Projected Staff:

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

Year One:

Principal

Office Manager

Custodian

Core Content Teachers

EC Teacher

Teacher Assistants (Part Time)

Part Time Physical Education Teacher

Part Time Visual/Performing Arts Teacher

Year Two:

Principal

Office Manager

Custodian

Core Content Teachers

EC Teacher

Teacher Assistants (Part Time)

Physical Education Teacher

Visual/Performing Arts Teacher

ELL Teacher

Year Three:

Principal

Vice Principal

Office Manager

Administrative Assistant

Custodian

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Core Content Teachers

EC Teacher

Teacher Assistants (Part Time)

Physical Education Teacher

Visual/Performing Arts Teacher

ELL Teacher

Year Four:

Principal

Vice Principal

Office Manager

Administrative Assistant

Custodian

Core Content Teachers

EC Teacher

Teacher Assistants (Part Time)

Physical Education Teacher

Visual/Performing Arts Teacher

ELL Teacher

Year Five:

Principal

Vice Principal

Office Manager

Administrative Assistant

Custodian

Core Content Teachers

EC Teacher

Teacher Assistants (Part Time)

Physical Education Teacher

Visual/Performing Arts Teacher

ELL Teacher

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The board personnel committee will initially recruit a qualified principal. As soon as a principal has been identified, he or she will become a leader of the recruiting and hiring process. Advertising for open positions will be done through the school website, social media, local newspapers, and college and university placement centers. The Academy's teachers will be professional, high performing teachers who have a strong belief in our mission. We will have a mentoring process that will allow experienced teachers to guide and mentor new teachers. The Academy will offer an administrative team that supports the teacher in his or her pursuit of a safe and orderly environment. We will survey the staff at least once per year and use data from the survey to inform decisions. Teachers will be given a voice as stakeholders by having representatives on the School Improvement Team (SIT) and the Parent Teacher Organization (PTO). The principal and the board personnel committee will develop a clear, consistent rubric that will be used to make salary and bonus decisions and the Academy will have a variety of high-quality and relevant professional development

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opportunities.

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

The employees of the Academy will be employees of the board of directors. The board will hire and directly supervise the principal who will, with the help of other administrators when appropriate, directly supervise the other staff members. The board will approve all hires, position changes, terminations, staff policies, and staff procedures.

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

The Academy will use a variety of methods to attract interested, qualified candidates; including but not limited to: open house format, word of mouth, and directly contacting distinguished teachers that would be a good fit. Once potential candidates are identified, the board personnel committee or the principal will further vet the candidates and make recommendations for interviews. The board personnel committee, the principal, and the principal's hiring committee will all interview candidates before the principal makes a recommendation to the board of directors for approval. The principal's hiring committee will consist of staff members and at least one parent. Upon approval of the board of directors, new hires will undergo a criminal background check. No candidate will be offered an unconditional offer of employment without passing a criminal background check.

The principal will be the direct supervisor of the staff. In that role, it will be his or her responsibility to notice any deficiencies in staff performance. Except for the most egregious offenses, the principal will use available resources at his or her disposal to remediate and develop the staff member so that expectations are met. Forms of development can range from small corrections to formal action plans for improvement. Plans of improvement will include clear performance expectations, support that the staff member will be offered to meet those expectations, and a reasonable, definitive time frame for meeting those expectations. If, after being on a formal action plan, the employee has still not demonstrated the expected improvement in performance, the principal may recommend the employee to the board for termination. The final decision to terminate an employee will belong to the board of directors. If an employee feels as though he or she has been wrongly terminated he or she may follow the formal grievance policy.

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

Year One:

Principal: \$57,000- \$70,000

Office Manager: \$27,000- \$35,000

Custodian: \$20,000- \$28,000

Core Content Teachers: \$35,000- \$50,000

EC Teacher: \$39,000- \$45,000

Teacher Assistants (Part Time): \$16,000- \$20,000

Part Time Gym Teacher: \$16,000- \$20,000

Part Time Visual/Performing Arts Teacher: \$16,000- \$20,000

The Academy will offer a full range of benefits to full time employees, including a retirement plan, life insurance, medical, long and short term

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disability, and dental plans. Some of the benefits will be offered to employees at the expense of the Academy, while others will be offered as employee paid benefits.

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

The employee grievance policy will offer employees a process for resolving situations in which they feel they have been wronged, including wrongful termination. The first step in the grievance process is for the employee to speak to his or her immediate supervisor about the problem. If the issue is not resolved to the employee's satisfaction, a written grievance may be submitted to the principal. If the principal does not resolve the issue, the grievance will be submitted to the board personnel committee. If the committee does not resolve the issue, the employee may submit a written request for a hearing before the full Board of Directors.

The principal, as the direct supervisor of the employees, will have the responsibility to evaluate and develop employees. If, after an appropriate attempt to develop the staff member, including the action plan outlined above, the principal decides that the staff member is not a good fit for the Academy, he or she may make a recommendation to the board for termination. The final decision to terminate an employee will rest with the board.

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

As a public charter school, many staff members at the Academy may have dual roles and responsibilities. Some employees may be hired as part time employees and may hold positions outside of the Academy. Any employees with dual roles and responsibilities will be funded completely out of the general operating budget.

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 special needs population, including ELL students, has been estimated based on the experience of other similar charter schools and staffing for the anticipated EC population is provided for in the budget. The Academy has budgeted for two EC starting in the first year. With an initial enrollment of 216 and estimating a 12% EC population, the Academy expects approximately 25 EC students. Some EC services, such as speech therapy, occupational therapy, and psychological services will be contracted out to qualified professionals. The Academy's budget reflects estimates for those services based on the same projected 12% EC population. The process for hiring qualified EC staff is the same that will be followed for hiring other staff members.

Gifted students will be served by classroom teachers who have been trained in classroom differentiation and by a rigorous, challenging academic program.

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

Principal: The principal will be responsible for overseeing the day to day operations of the school. He or she will implement the policies approved by the board of directors and will, at the direction of the board, supervise the school staff and ensure the school's compliance with all applicable laws, SBE policies, and testing procedures. The principal must be committed to the mission of CCS and willing to work collaboratively to achieve the

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school-wide goals as set out in the application and the school improvement plan. Professional education experience and a master's degree in school administration is preferred.

Vice Principal: The Vice principal will report to the principal and perform duties delegated to him or her by the principal. The assistant principal will fulfill the duties of the principal in his or her absence. The assistant principal must be committed to the mission of the Academy and willing and able to work collaboratively to achieve the school-wide goals. Professional education experience and a relevant advanced degree is preferred.

Office Manager: The Office Manager will facilitate purchasing, invoicing, payroll, and inventory. He or she will have a bachelor's degree and experience in management. The manager will be responsible for student data, attendance, communications, and oversight of office procedures. He or she will have a bachelor's degree.

Custodian: The custodian will clean and maintain the school as necessary and as directed by the principal and office manager.

Curriculum Coordinator: The curriculum coordinator will be one of the core content teachers. They will be responsible for supporting teachers in the implementation of Core Knowledge, Saxon Math, and Shurley English, as well as any other curricula approved by the board. He or she, with support and direction from the principal, will ensure that the Academy's educational program is implemented with fidelity. He or she will support teachers in PLCs, serve on the board academic committee, and work with the Core Knowledge Foundation to coordinate evaluations and professional development that will support the Academy in its efforts to become an official Core Knowledge school. He or she will have a bachelor's degree, will be committed to the mission and goals of the Academy, and have relevant education experience.

Teachers: Teachers will be responsible for teaching the subject matter, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Teachers must have the ability to become highly qualified in their subject area. Licensed teachers are preferred.

EC Teachers: EC Teachers will be responsible for developing and implementing IEPs, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All EC Teachers must comply with state and federal laws. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Licensed EC Teachers are required.

Staff Evaluation and Professional Development

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

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The principal will be ultimately responsible for maintaining teacher licensure requirements and coordinating professional development.

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

The principal will be responsible for the professional development of all the staff, serving in effect as a mentor to all teachers and staff. Additionally, new teachers will be assigned experienced teachers to serve as mentors. Observations will be conducted in several different ways. The principal (or assistant) will conduct formal classroom observations at least once per quarter. These observations will be followed up with feedback in a post-observation meeting with the administrator. Additionally, an administrator will conduct informal walk-throughs at least twice per quarter. The principal will provide feedback from these informal observations in the form of a walk-through form that will be given to the teacher after the visit. For new teachers, mentors will also observe and provide feedback and support on a quarterly basis.

Retaining high quality teachers will be a priority for the administration and the board. Teachers will be surveyed once or twice per year. The survey results will be reported to the personnel committee and full board and will help inform the decisions that are made for the school's hiring committee, and various board committees. A teacher evaluation rubric will be developed and used for the annual teacher evaluations. Indicators will include parent surveys, NWEA scores in growth and proficiency, EOGs, NCEES data, parent satisfaction survey results, additional roles and responsibilities, and involvement with the the Academy's community. Scores from the rubrics will be used to determine annual raises and bonuses, if funds are available.

- 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 staff development plan consists of three distinct kinds of development:

Formal: The formal, staff-wide development will be delivered internally, sometimes by an administrator and sometimes by someone brought in with expertise on a specific topic. Formal development will include most of the before school professional development days and will also occur during many teacher work days and monthly staff meetings.

Individual: Individual professional development includes external, subject-specific training. For new teachers, mentors will provide valuable development in the form of frequent feedback and support. Instructional observations, coupled with feedback from the principal and other administrators will provide further valuable professional development for the staff. The curriculum coordinator (designated and experienced core content teacher) will work with teachers individually to provide support, coaching, modeling, and other assistance.

Small Group: Teachers will be expected to meet in small groups weekly. These professional Learning Communities will serve as another way for teachers to evaluate their lessons, plans, and instruction. The administrators and

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curriculum coordinator will frequently attend these meetings and offer feedback, coaching, resources, best practices, and support with the goal of improving instruction and student learning. New teachers will also participate in new teacher training in the form of monthly small groups where they will receive training and support to help them develop and grow into effective, experienced educators.

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

The principal will be responsible for planning the professional development of the staff. Five full days of PD are scheduled before school begins and are reflected in the school calendar. Three of those days will be exclusively Core Knowledge training. Other topics to be covered include how to successfully implement Saxon Math, Shurley English, and Core Knowledge Language Arts. Interpreting NWEA results, classroom management and classroom differentiation will also be covered. Topics from the days before school starts will be revisited periodically throughout the year on teacher workdays and during monthly staff meetings.

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.*

Four full days of professional development are scheduled throughout the year, indicated as teacher work days on the school calendar. During those days, at the discretion of the principal, topics from the initial pre-opening days will be revisited in more depth. Additional topics may be covered as needed. Additional professional development will also take place at monthly staff meetings and at monthly new teacher training meetings. The principal will work with the assistant principal (after the first year) and the curriculum coordinator to design and implement a coherent professional development plan within the framework outlined here. There are also other professional development opportunities during the school year (on teacher work days) via webinar.

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)).

The Academy will market the school in a variety of ways with the intention of allowing as many people as possible the opportunity to apply and be a part of the lottery, if necessary.

Parent Interest Meetings: The Academy will hold multiple parent interest meetings from the time the school is approved through the fall of the first

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year. The school plans to team up with local businesses to host these public meetings. The Academy plans to have meetings in Monroe city, Marshville, Wingate, and eastern parts of Wesley Chapel and Indian Trail. Meetings will be advertised through social media, local media outlets such as the Enquirer Journal, flyers distributed to day care centers, houses of worship, community centers, and athletic venues. We will take every opportunity to speak at houses of worship and community meetings.

Community Events: Representatives from the school will attend community-wide events to promote the opening of the school. At these events, the board and volunteers will hand out flyers and letters of intent. This will help the school get an estimate of enrollment numbers and seek out business partners for the school. The Academy has been collecting the emails of interested community members, business owners, parents, and teachers to start building a communications list. This list will be used to notify those interested of upcoming events.

Advertising: The Academy will advertise its open enrollment period in local media, including newspapers, and online to give as many people as possible an opportunity to apply before the lottery is held.

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.*

The Academy's primary means of communicating, initially, will be through our website (www.monroecharteracademy.org) and Facebook. The Academy will also hold community meetings, attend community-wide events, and speak to local clubs, churches, and other civic organizations. As soon as the open enrollment period is over and a lottery is held, if necessary, The Academy will be able to engage the parents of enrolled students for the first time. Parent meetings and social events will be held; parents will be appointed to board committees; the Academy will assist in the formation of a PTO with active committees that will be a significant help with the opening of the school.

Once the school is open and operating, The Academy will seek out community leaders, business owners, and other members to come speak. This community interaction will be through our focus on citizenship. We intend to foster and maintain our relationships to seek new opportunities for the Academy to grow in the community. Students will also spend time engaging the community through our citizenship focus, seeing how they can add value and a bridge to well-being. The Academy will maintain an open line to parents once the school is opened. Parents will be able to access a member of the PTO and the School Improvement Team. If a parent is unable to be heavily involved through the PTO or the SIT, then they will have the opportunity to attend a "Curriculum Night" or "Back to School Night" to experience the Academy's culture.

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Admissions Policy

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

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

1. The open enrollment period will begin on the date of final approval from the SBE and end on Friday, February 16th at 5:00 pm. Before final approval, interested parents may fill out a letter of interest. Everyone who submits a letter of interest will be contacted and informed about how to apply as soon as final approval is granted. To apply to Monroe Charter Academy, parents must fill out an application and mail it or hand deliver it to the school's temporary office. There will also be an option to fill out an online application. To be included in the lottery, applications must be in the office by 5 pm on February 16th, 2018.

2. If a lottery is necessary, it will be held in a public place and announced on the Academy's website and Facebook page. All of the names for the lottery will be written on cards and drawn at random. After all of the names have been drawn to fill the available spots, the rest of the names will be drawn and placed on a numbered waiting list. Families need not be present at the lottery to accept enrollment. Families will be notified in writing whether they were drawn in the lottery and will be offered a spot for enrollment or where they were placed on the waiting list. Enrollment paperwork will be sent to students who secure a spot in the lottery process.

The Academy will give preference in the lottery to:

- students of full-time staff
- students of board members

For siblings, multiple birth and otherwise, Monroe Charter Academy will enter one card in the lottery with the names of all of the siblings on it. If the family card is drawn in the lottery, the Academy will offer enrollment to all of the siblings on the card. Following that procedure should ensure that siblings will be able to stay together and all attend the Academy. After the first year, siblings of students who were enrolled at the Academy the previous year will also get enrollment preference.

3. If a spot opens, the first student from the waiting list will be offered the spot through the first day of the second quarter. Families will be offered information and a reasonable amount of time to make the decision to accept or decline the spot. If the family chooses to decline the offer of enrollment, the next student on the waiting list will be offered a chance to enroll. If a student wishes to withdraw from the Academy, they will be asked to do so in writing. The parents will fill out a form that asks them to list the reason for the withdrawal. If the reason for the withdrawal is

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transportation the principal will ask to meet with them to formulate a personal transportation plan so that the student can remain at the Academy. The Academy will have no preference for previously enrolled students. If a student wants to transfer to another school, he or she will first have to be withdrawn from the Academy, using the procedure outlined above.

4. There will be no pre-admission activities for students or parents of the Academy.

5. Students withdrawing from the Academy will be asked to do so in writing. The withdrawal form will include the reason for the withdrawal and the school to which the student will be transferring.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No:

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

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

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

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

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PROJECTED ENROLLMENT

2018-19 through 2022-2023

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Union County Public Schools
 LEA #2 Charlotte-Mecklenburg Schools
 LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000
Kindergarten	68	4	0	68	4	0	68	4	0	68	4	0	85	5	0
Grade 01	68	4	0	68	4	0	68	4	0	68	4	0	68	4	0
Grade 02	68	4	0	68	4	0	68	4	0	68	4	0	68	4	0
Grade 03	0	0	0	68	4	0	68	4	0	68	4	0	68	4	0
Grade 04	0	0	0	0	0	0	68	4	0	68	4	0	68	4	0
Grade 05	0	0	0	0	0	0	0	0	0	68	4	0	68	4	0
	204	12		272	16		340	20		408	24		425	25	

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Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
The applicant has 24 months to apply for tax-exempt status.	Shannon Sellers	Tax-Exempt S
Has not obtained at this time.	Jessica Kelly	Tax-Exempt S
501(c)(3) Not obtained yet.	Shaunda Cooper	Tax-Exempt S
How will a board member from out of state be able to fulfill all the responsibilities for board members that you have stated? With a board member on the SIT, will this prevent staff from being as open in regards to the day to day operation of the school? What is the turn around time for a grievance that has been filed? How will the board be evaluated? Clarity is needed on the evaluation of the administrator.	Shannon Sellers	Governance a
In the application table on page 31, Davis and Brockman are not listed as educators, but have teaching licenses. It was noted within the application that they are educators. In what capacity did or do they serve as educators?	Hilda Parlér	Governance a
How is conflict of interest avoided with Anthony Rodriguez's participation on the board and participation by students in the Bill of Rights Institute, for whom he works?	Jennifer Gnann	Governance a
Experienced and diverse experienced board a plus	Joe Maimone	Governance a
How will having an out of state board member impact decisions? How much of an investment can they have if they are out of state?	Jessica Kelly	Governance a
Will you also add staff selected representation to your board?		
The school does not plan to establish a relationship with an EMO.	Shaunda Cooper	Proposed Man
NO EMO.	Shannon Sellers	Proposed Man
Not applicable.	Jessica Kelly	Proposed Man
How will you ensure academic goals are met with not having full time teacher assistants in your younger grades (K-1)? No ELL teacher year one? Who will fulfill these responsibilities? Who will oversee the school financials, year one?	Jessica Kelly	Staffing Pla
adequate	Joe Maimone	Staffing Pla
How many core teachers do you plan to hire? How will you attract teachers for the proposed salary if they have to perform dual roles? What is CCS? According to the application, "The principal must be committed to the mission of CCS and willing to work collaboratively..." Please clarify What is the process for hiring an ELL teacher? You give a job description for the Curriculum Coordinator but this position is not listed in your projected staff for the first 5 years at the top of this page. Please clarify why you have this listed?	Shannon Sellers	Staffing Pla
What will the evaluation for teachers look like? What will be looked for?	Shannon Sellers	Staff Evalua
The PLC component of professional development with a "coaching" emphasis will be implemented and will benefit beginning teachers tremendously.	Hilda Parlér	Staff Evalua
How will the marketing plan be adjusted to reflect the hope of having a more equally diverse student population than the local district?	Jennifer Gnann	Marketing Pl
no mention of hispanic outreach?	Joe Maimone	Marketing Pl
Can you clarify how the budget details play into the marketing strategy for recruiting students?	Shaunda Cooper	Marketing Pl
How will parents be involved in the day on a daily basis?	Jennifer Gnann	Parent and C
Will the school have any outreach to their community? You state you will have leaders in the community come and speak. Please elaborate on the school's involvement in the community.	Jessica Kelly	Parent and C
Have you begun to reach out to community leaders to speak?	Shannon Sellers	Parent and C
This board has already had a new school approved for this round. This is their first school. They need to open 1 successfully before trying to open a second.	Cheryl Turner	Projected St
Lottery: On the family card are names of all siblings. Suppose there are no seats for all	Hilda Parlér	Weighted Lot

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on the card? Would it be more prudent to say that when the family card is drawn, the siblings will be offered enrollment "If" there is a seat?		
No weighted lottery.	Jessica Kelly	Weighted Lot
The school has chosen to not participate in the weighted lottery process.	Shaunda Cooper	Weighted Lot
The applicant does not plan to use a weighted lottery.	Shannon Sellers	Weighted Lot

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

The NC statutes say, "The charter school shall develop a transportation plan so that transportation is not a barrier to any student who resides in the local school administrative unit in which the school is located." Because Monroe has a high percentage of economically disadvantaged households, accessibility may be difficult for many students. The Academy will provide two buses that we anticipate being the mode of transportation for over one third of our students.

To reach all the students needing a school bus we have budgeted \$50,000 in year one. We have communicated with the Finance & Business Division, and the Transportation Section Chief, Derek Graham, for assistance in safety, laws and policy, operational requirements, and purchasing.

We will contract with a provider like Eagle Bus Service, with whom our board members have contracted with before with other charters, who will provide us with two buses, drivers, fuel and maintenance, and managing the busing process or; we will find used buses that typically have to be retired from the state fleet at 200,000 miles and can be purchased often for under \$5,000. We project, based upon exact numbers from a nearby charter, that we can provide for about 100 miles of daily bus travel from Eagle for the \$50,000.

Prior to the opening of school we will use Google mapping and specialty software to connect parents who may consider carpooling in order to have an organized as possible plan for many to carpool on day one and throughout the year. We see other benefits, including early relationship building among parents and students who might carpool and develop friendships earlier than otherwise.

Once we have a location we will devise a car traffic stacking plan and coordinate that with Monroe and DOT officials for local and state compliance, keeping the safety of our students paramount.

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.

It is the belief of the Academy's board that it has a moral duty to care for and nurture the students of the Academy, not just academically, but socially as well. Therefore, the Academy will strive to make sure all students, regardless of income, are able to have a healthy lunch at school. Students at the Academy will have several options when it comes to lunch at school.

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1. Students may bring lunch from home. Milk will be available for purchase or possibly free.
2. On selected days, students may purchase lunch through an outside vendor. The cost of these lunches will have a small profit built in that will be used to help pay for the lunches of the students who cannot afford to purchase one.
3. Cold lunches will be available for students who forget their lunch. A small profit will be built into the cost of these lunches that will be billed to the parents. This mark-up will be used to help pay for the lunches of the students who cannot afford to purchase one.
4. For students who qualify for free and reduced lunch, the Academy will provide a lunch. On days when vendor lunches are available, the Academy will provide those students on free or reduced lunch with a meal from that vendor. On days when vendor lunches are not available, the Academy will provide a cold meal to students on free or reduced lunch.

The Academy has budgeted \$58,300 for meals in its opening year. In that calculation we estimated a maximum of 38,800 meals with half of our students being given free meals at a cost of \$3, given a negotiated pricing menu or volume discounts on purchased foods and beverages. To be conservative, this \$58,300 would assume there was no profit in the meals mentioned in 2 and 3 above.

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		\$1,457.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$4,277.00
Property Insurance	\$140,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$6,539.00
Total Cost			\$13,236.00

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

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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.

monroecharter 09/19/2016

(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.

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.

First, we are very aware of the challenges charters have with facilities, including the lack of them and the lack of funding. Our board chair has found, negotiated, and contracted for facilities for two NC charter schools, Union Academy and Union Day, as well as worked with several other new charters. We intend to complete our facility acquisition and ECO earlier than most charters have.

The initial facilities will be leased with consideration of purchasing between years 5 and 10 as the Academy builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and the Academy or a transaction including a developer such as Funding the Gap, American Charter Development, HighMark, or another partner. These companies assist charters in locating facilities and then purchasing them with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new constructed facility after the term lease of the initial facility.

We have an memorandum of understanding (MOU) with Education Alliance Services, Inc. in which it would work to coordinate the acquisition of real estate loans, from its existing network of private investment groups, of up to \$10 million and personalty up to \$1.5 million.

The facility will be in compliance with all necessary health and safety requirements required as well as any steps necessary to obtain the Educational Certificate of Occupancy.

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Monroe, like many smaller towns, has seen migration out of the town and to the west side of the county, with families leaving for better jobs and schools. This has left many vacant or underutilized churches and commercial facilities available.

To date the board has identified several properties. We are looking for a space of 16,000 square feet and growing to about 32,000 at our maximum enrollment of 432.

Our facilities budget of \$162,000 in lease expense was based upon 75 feet per student or 16,200 square feet at \$10 a foot.

Spaces we have seen and investigated include:

1. 1320 S. Hayne St. in Monroe

This campus is a first priority. It is an abandoned former private school converted recently to a church but now for sale. It has 9.9 acres a total of 17,600 square feet in three buildings with large parking areas. It is listed for \$795,000 or \$45 a foot. Upfitting this property to meet our needs would be affordable with one of our facilities partners above purchasing and making the improvements and then wrapping those costs into a 3-5 year lease with a possibility of building space on the 10 acres to grow our school to the 432 student level.

2. 2507 Walkup Ave. in Monroe

This is a former church also with 19,936 square feet and 4 acres. It is listed for sale at \$1,100,000 or \$55 a foot.

3. 404 N. Elm St. Marshville

This was also a church and has 21,299 square feet but only 2 acres. It is listed for \$325,000 or \$15 a foot. This area is just east of Monroe and slightly off Highway 74.

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.

Spaces we visited averaged a sales price of about \$40 a foot and with a lease rate of 15% annual gross rent would be only \$6 a foot. Upfitting a space would run our rent, after capitalization of those costs, to the \$10 a foot range.

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.*

While the Academy board possibly works with a commercial broker and the developers listed above, to find a suitable permanent facility, it will simultaneously be looking for contingency facilities.

The Academy board will identify sites that can be used with limited

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modifications for a period of sixth months to two years in the event that a permanent site cannot be found in time for a 2018 opening. One of these additional sites, if needed, will allow the Academy additional time to locate and acquire a permanent site. Examples of a site suitable for one to two years include large churches and synagogues.

The Academy board will also identify sites that can be used temporarily, for a period of two to eight weeks, in the event that a permanent site has been identified but is not ready in time for a 2018 opening. One of these back-up sites will allow us additional time to complete any necessary modifications to the permanent site. Examples of a suitable site for up to 8 weeks are churches, community centers, and movie theaters.

Modular classrooms("Educational Cottages") by companies such as Mobile Modular and Vanguard have units already approved for educational use and available quickly and leased for as little as one month.

Any modifications of the programs will depend on the site that is ultimately used. The most likely scenario is that PE will have to be modified if the contingency facility does not have a gym. The Academy will be looking for a facility with 2 administrative offices, outdoor play area, parking for at least 90 cars, and 12-14 classrooms.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
Will the bus transportation be available to all students? Will transportation be of cost to any families?	Jessica Kelly	Transportati
How will students with special needs with transportation written into their IEP receive transportation?	Jennifer Gnann	Transportati
It was a good idea to consult with Transportation Section Chief, Derek Graham.	Hilda Parlér	Transportati
Not signed by board chair.	Jessica Kelly	Healthy and
Not signed by a person.	Jennifer Gnann	Healthy and
Due diligence was done on facility options.	Hilda Parlér	Facility and
experience a plus	Joe Maimone	Facility and

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

VI. FINANCIAL PLAN

In the following sections present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income.

Budget: Revenue Projections from each LEA 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 #1900 - Union County Public Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,863.33	204	\$992,119.32
Local Funds	\$2,100.00	204	\$428,400.00
Federal EC Funds	\$3,579.70	24	\$85,912.80
Totals			\$1,506,432.12

LEA #2600 - Charlotte-Mecklenburg Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,852.22	12	\$58,226.64
Local Funds	\$2,469.24	12	\$29,630.88
Federal EC Funds	\$3,579.70	1	\$3,579.70
Totals			\$91,437.22

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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	\$1,050,346	\$1,396,960	\$1,746,200	\$2,095,440	\$2,179,258
-Local Per Pupil Funds	\$458,031	\$609,181	\$761,476	\$913,772	\$950,323
-Exceptional Children Federal Funds	\$89,493	\$119,026	\$148,782	\$178,539	\$185,681
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$1,597,869	\$2,125,167	\$2,656,458	\$3,187,751	\$3,315,262

***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	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Principal	1	\$70,000	\$70,000	1	\$75,000	\$75,000	1	\$78,000	\$78,000	1	\$79,000	\$79,000	1	\$81,000	\$81,000
Vice Principal	0	\$0	\$0	0	\$0	\$0	1	\$62,000	\$62,000	1	\$65,000	\$65,000	1	\$68,000	\$68,000
Office Manager	1	\$35,000	\$35,000	1	\$37,000	\$37,000	1	\$38,500	\$38,500	1	\$40,500	\$40,500	1	\$42,000	\$42,000
Administrative Assistant	0	\$0	\$0	0	\$0	\$0	1	\$28,000	\$28,000	1	\$29,000	\$29,000	1	\$30,000	\$30,000
Custodian	1	\$27,000	\$27,000	1	\$29,000	\$29,000	1	\$31,000	\$31,000	1	\$32,500	\$32,500	1	\$34,000	\$34,000
A - Total Admin and Support:	3		\$132,000	3		\$141,000	5		\$237,500	5		\$246,000	5		\$255,000
Instructional Personnel:															
Core Content Teacher(s)	10	\$42,000	\$420,000	13	\$43,600	\$566,800	16	\$45,400	\$726,400	19	\$47,200	\$896,800	20	\$50,000	\$1,000,000
Part Time Teacher Assistants	3	\$18,000	\$54,000	3	\$18,700	\$56,100	4	\$19,500	\$78,000	5	\$20,300	\$101,500	5	\$21,100	\$105,500
E C Teachers	2	\$44,000	\$88,000	2	\$45,700	\$91,400	3	\$47,600	\$142,800	3	\$49,500	\$148,500	3	\$51,500	\$154,500
E L L Teachers	0	\$0	\$0	1	\$43,600	\$43,600	1	\$45,400	\$45,400	2	\$47,200	\$94,400	2	\$50,000	\$100,000
Arts Teachers	0	\$0	\$0	1	\$43,600	\$43,600	1	\$45,400	\$45,400	1	\$47,200	\$47,200	1	\$50,000	\$50,000
P E Teachers	0	\$0	\$0	1	\$43,600	\$43,600	1	\$45,400	\$45,400	1	\$47,200	\$47,200	1	\$50,000	\$50,000
Part Time Arts Teachers	1	\$18,000	\$18,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0

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Part Time P E Teachers	1	\$18,000	\$18,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
B - Total Instructional Personnel:	17		\$598,000	21		\$845,100	26		\$1,083,400	31		\$1,335,600	32		\$1,460,000
A+B = C - Total Admin, Support and Instructional Personnel:	20		\$730,000	24		\$986,100	31		\$1,320,900	36		\$1,581,600	37		\$1,715,000
Administrative & Support Benefits															
Retirement Plan 401 K And Profit Sharing	3	\$2,500	\$7,500	3	\$2,600	\$7,800	5	\$2,690	\$13,450	5	\$2,770	\$13,850	5	\$2,860	\$14,300
Health Insurance	3	\$4,300	\$12,900	3	\$4,430	\$13,290	5	\$4,500	\$22,500	5	\$4,700	\$23,500	5	\$4,850	\$24,250
Medicare, Social Security & Unemployment	3	\$4,182	\$12,546	3	\$4,300	\$12,900	5	\$4,550	\$22,750	5	\$4,700	\$23,500	5	\$4,800	\$24,000
Life And Disability Insurance	3	\$1,200	\$3,600	3	\$1,235	\$3,705	5	\$1,270	\$6,350	5	\$1,310	\$6,550	5	\$1,350	\$6,750
D - Total Admin and Support Benefits:	12		\$36,546	12		\$37,695	20		\$65,050	20		\$67,400	20		\$69,300
Instructional Personnel Benefits:															
Retirement Plan Other 401 K And Profit Sharing	12	\$2,500	\$30,000	18	\$2,600	\$46,800	22	\$2,690	\$59,180	26	\$2,770	\$72,020	27	\$2,860	\$77,220
Health Insurance	12	\$4,300	\$51,600	18	\$4,430	\$79,740	22	\$4,500	\$99,000	26	\$4,700	\$122,200	27	\$4,850	\$130,950
Medicare, Social Security, And Unemployment	17	\$3,258	\$55,386	21	\$3,400	\$71,400	26.5	\$3,700	\$98,050	31	\$3,900	\$120,900	32	\$4,200	\$134,400
Life And Disability Insurance	12	\$1,200	\$14,400	18	\$1,235	\$22,230	22	\$1,270	\$27,940	26	\$1,310	\$34,060	27	\$1,350	\$36,450
E - Total Instructional Personnel Benefits:	53		\$151,386	75		\$220,170	92.5		\$284,170	109		\$349,180	113		\$379,020
D+E = F - Total Personnel Benefits	65		\$187,932	87		\$257,865	112.5		\$349,220	129		\$416,580	133		\$448,320
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	15		\$168,546	15		\$178,695	25		\$302,550	25		\$313,400	25		\$324,300
B+E = H - Total Instructional Personnel (Salary & Benefits)	70		\$749,386	96		\$1,065,270	118.5		\$1,367,570	140		\$1,684,780	145		\$1,839,020
G+H = J - TOTAL PERSONNEL	85		\$917,932	111		\$1,243,965	143.5		\$1,670,120	165		\$1,998,180	170		\$2,163,320

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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:					
Other	Legal Fees	\$3,600	\$4,100	\$4,600	\$5,100	\$5,600
	Advertising And Marketing	\$4,300	\$4,500	\$4,700	\$4,900	\$5,100
	Insurance	\$13,236	\$17,500	\$21,900	\$26,300	\$27,000
	Communications, Website, Administrative Software	\$29,500	\$20,000	\$25,000	\$30,000	\$32,000
	Facility Rent	\$162,000	\$215,400	\$269,200	\$323,100	\$326,000
	Facility Repairs And Maintenance	\$14,400	\$19,150	\$23,900	\$28,700	\$29,500
	Facility Utilities	\$25,900	\$34,400	\$43,000	\$51,600	\$53,200
	Office Expense, Supplies, And Postage	\$17,300	\$18,200	\$19,100	\$20,000	\$20,600
	Ling, Powerschool, & Admin Support Expenses	\$30,000	\$39,900	\$49,800	\$59,800	\$61,600
	Student Transportation- Buses Expense	\$50,000	\$66,000	\$83,000	\$100,000	\$103,000
	Student Meals	\$58,300	\$77,500	\$96,900	\$116,300	\$119,800
	Technology, Equipment, Capitalized Assets Cost	\$21,600	\$15,000	\$20,000	\$25,000	\$30,000
	Travel	\$3,600	\$4,100	\$4,600	\$5,100	\$5,600
	I T Services	\$14,500	\$19,300	\$24,100	\$28,900	\$29,800
	Non Categorized Expenses	\$11,500	\$15,300	\$19,100	\$22,900	\$23,600
	Audit Fee (Year 1 \$0)	\$0	\$9,500	\$10,500	\$11,000	\$11,200
	K - TOTAL Administrative & Support Operations	\$459,736	\$579,850	\$719,400	\$858,700	\$883,600
	Instructional:					
Other	Curriculum & Books	\$32,800	\$39,600	\$46,500	\$54,000	\$63,000
	Staff Development	\$26,200	\$30,800	\$35,500	\$43,300	\$45,800
	Testing & Fees	\$11,500	\$15,300	\$19,000	\$22,100	\$23,000
	Classroom Technology, Furn, & Capitalized Assets	\$17,300	\$23,000	\$28,700	\$34,500	\$35,500
	Non Categorized Expenses	\$8,000	\$10,600	\$13,300	\$15,900	\$16,400
	Substitutes	\$7,500	\$9,900	\$12,500	\$15,000	\$15,400
	E C Contracted Services	\$17,000	\$12,000	\$16,000	\$18,000	\$19,000
	E L L Contracted Services	\$22,000	\$15,000	\$15,000	\$18,000	\$19,000
	L - TOTAL Instructional Operations	\$142,300	\$156,200	\$186,500	\$220,800	\$237,100

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	K+L = M - TOTAL OPERATIONS	\$602,036	\$736,050	\$905,900	\$1,079,500	\$1,120,700
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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$917,932	\$1,243,965	\$1,670,120	\$1,998,180	\$2,163,320
M - TOTAL OPERATIONS	\$602,036	\$736,050	\$905,900	\$1,079,500	\$1,120,700
J+ M =N TOTAL EXPENDITURES	\$1,519,968	\$1,980,015	\$2,576,020	\$3,077,680	\$3,284,020
Z - TOTAL REVENUE	\$1,597,869	\$2,125,167	\$2,656,458	\$3,187,751	\$3,315,262
Z - N = SURPLUS / (DEFICIT)	\$77,901	\$145,152	\$80,438	\$110,071	\$31,242

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 Number:

Monroe has district schools with about 2,000 elementary students. The average reading proficiency is 29% for this cohort. If we start with a conservative number, 216, the first year we would have about 11% of the Monroe city students in our grades K through 2. We would then add a grade a year to get to 450 in year four at K-5. Union County as a whole has over 40,000 K-12 students but our marketing will target the inner-city demographic.

Demand:

Monroe has only one charter, Union Academy, which opened in 2000 and has over 1,500 students and a similar wait list. Union Day and Union Preparatory are two charters that opened in 2016 and had immediate lotteries. These schools were in the western part of the county. There is no opportunity for a family to attend a charter in Monroe. The inner-city, economically challenged families and children cannot access a desired education with no financial resources to go to a private school or live in a neighborhood with a higher rated public school. Union County as mentioned is a county of over 200,000 and over 40,000 public school students. The children in Monroe, and east including Wingate and Marshville, are being short-changed.

Breakeven:

The breakeven point in number of students, using a traditional breakeven analysis formula, was calculated by dividing non-variable costs (fixed costs, \$172,825) by margin, or revenue (\$7,398) less variable costs (\$6236) per student. That number is 149 students to break even.

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

To properly avoid enrollment pressures we need to aggressively market our school, secure a known facility, and solidify the parents' commitment way before the first day of school (Events such as "Curriculum Night" and "Spirit Night", etc.). However, actual under-enrollment would be handled by:

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- 1 Reducing the classes and the matching teacher positions, payroll, and benefits immediately.
- 2 Restructuring the facility lease arrangement to defer the deposit and the first and 12th months' rent.
- 3 Restructuring the Core Knowledge curriculum and training expense.
- 4 Leasing versus paying for capital equipment.
- 5 Renegotiating all contracts.
- 6 Board of Director loans.

Both the two charter schools our directors have been associated with as founders exceeded their approved first year enrollment and thus had lotteries (Union Academy and Union Day).

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

No, we are not using any unsubstantiated revenue sources in our budget. Our board chair has provided a non-interest bearing loan commitment of \$10,000 to the Academy.

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

18 to 1

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

The Board will outsource its LINQ Systems services but has not selected a provider. However, in the budget there is estimated for LINQ \$20,000 and \$10,000 for PowerSchool consulting and possible other administrative services, totaling \$30,000.

We will likely contract for EC services to complement our two full time EC teachers. ELL contracted services are included in our budget also.

Our board will set contract authorization levels, and recognize the need for conflict of interest avoidance, for itself and for the Principal. So all commitments exceeding predetermined amounts will require approval at different levels with the appropriate assignment of contract accountability placed also, to ensure the school receives the services and products contracted for and at the correct price.

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

We recognize that our enrollment will include a large percentage of students from households with lower incomes, aligning with our purpose of providing learning opportunities for at risk students. So, our first objective is to let people know about the opportunity our free public charter school offers. Although we have only budgeted \$4,300 for marketing (for 216 students) we have already begun a media campaign to become known. Articles about our school plans have been in both the Monroe and Anson County newspapers, we've started a Facebook campaign, and obtained a web URL, monroecharteracademy.org. We plan to meet with church leaders and community

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leaders to get our word to those less likely to use social media, to hear about us.

Secondly, these at-risk students need a way to get to our school. We have budgeted \$50,000 for two contract or purchased buses. To offer a healthy meal at cost, we have budgeted \$58,300 for student meals.

To hold our school accountable to the parents by meeting measurable student achievement results our goals and our assessments will measure baseline and formative data, communicated to parents, to honor our commitment to this purpose.

To provide an expanded choice in the type of educational opportunities in public education we will provide a Core Knowledge curriculum using a classical education model of instruction. The cost of the curriculum and the attendant training is almost \$58,000, or almost \$270 per student alone.

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.

Rather than a percentage goal, the goal will be to accumulate that "Surplus", as shown in the "Overall Budget" on the application page preceding this narrative. That surplus is predictably more in years 2-5 than in year one. Obviously then, after year three the Academy projects, and would like to have at least \$250,000 in the bank.

The use of surplus will, like most newer schools, be used mostly for equity needed for purchasing or building facilities in the future, after allowing for emergency reserves.

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

The Academy will always make lease versus purchase decisions based upon sound economics and professional financial analysis. In the critical initial years of operation, equipment, etc. leases may be required, whereas in subsequent years the Academy will be able to avoid the financing costs.

The initial facilities will be leased, barring any fortuitous donation of land or facilities, with consideration of purchasing between years 5 and 10 as the school builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and the Academy. Another, and more recent form of transaction in North Carolina, among new charters, is a transaction including a developer such as Funding the Gap, American Charter Development, HighMark, or other partner. These companies assist charters in locating facilities and then purchasing them and with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new facility after the term lease of the initial facility.

Some items such as office printers/copiers, etc. may be leased. The Academy

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will, however, have the option of deferred payments or leases of various other items in the budget but only if the enrollment targets are not met.

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*

We have no resources other than a \$10,000 loan commitment from the chair of our board. We have not used that in our budget. The Academy will solicit donations of goods and services upon receipt of acceptance of its application in addition to an aggressive Union County business fundraising campaign and grant request project.

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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?

We will contract for the DPI required services of the LINQ system with a provider after receiving more quotes. Outsourcing LINQ creates another level of cash segregation by its external accounting for our pupil funds, accounts payable, and payroll.

Internally, we will keep a petty cash fund for emergencies and use a system requiring a paid receipt and/or authorization for expenditures. Approval of expenditures over a recommended amount will require the signature of the Principal. School issued checks will be limited to a maximum of 10 per month requiring almost all transactions to flow through the LINQ reporting initially rather than after the fact.

Accounting records will be safeguarded by use of daily locked files and to the extent practical secure online records with appropriate password protections. Sensitive records will be systematically shredded as necessary. The board treasurer will provide a financial statement to include a statement of fund balances (balance sheet) and a statement of receipts and expenditures (a P&L) and a budget report at each regularly held board meeting and an explanation to board members for questions. Additionally, at least quarterly, the LINQ provider and or the auditors will be asked to attend board meetings.

As a guide we are adopting a 6,908 word "Statement of Financial Policies" we have been allowed to use by Union Day School.

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

Eddie Goodall, the board chair owns Goodall Consulting, a firm that provides LINQ services to several charter schools. The board will seek quotes and determine what company to use. If it is Goodall Consulting with services provided by LBA Haynes Strand, PLLC, with whom he is related, Goodall will either forego any money he may personally earn or resign as the board chair. Also, the board has discussed his firm's assisting the school to open and with its RTO process and if that discussion happens Goodall would recuse himself from discussion and voting after providing any proposals and/or resign as board chair.

Goodall Consulting has agreed to loan the Academy up to \$10,000 at no interest during the period leading up to the school opening. As of September 15, 2016 the loans have amounted to \$1,300.

The Monroe Charter Academy Board of Directors is also applying for a charter school for Anson County, called Anson Charter Academy. The applications are almost identical as the mission, purposes, and goals are the same, with the targeted demographics also alike. The applications are submitted knowing that both these charter under or non-served communities, deserve a charter school and that the operational efficiencies achieved by one board, operating both schools with fair and equal decision-making, will greatly

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enhance the success of both schools.

This governance structure combines both the grass roots ("organic") element of community born charters with the professional, financial, and operational oversight of a strong, experienced charter school board of directors. As stated elsewhere in the application, this proposed arrangement is modeled after the South Piedmont Community College governance structure (The SPCC board oversees the Union and Anson college campuses). It is noted also that one NC charter board already oversees four charters.

ATTRIBUTION: Although there have been several contributing to this application, three of the board members were also either on the Charlotte Classical School (CCS) Board of Directors or assisted CCS in an earlier charter application (to open in 2016) and portions of this application were used from that CCS application, with permission. Obviously and as stated earlier, the Academy and Anson Charter Academy are modeled after each other and thus the Anson charter application will have much of the same language as this application.

We know of no other relationships needing clarification or attention. None of the board will have children there or have any agreement to have jobs or other contracts at the Academy.

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

We have agreed to use the firm of Potter & Company. They are at 434 Copperfield Blvd. Suite A in Concord, NC. The telephone is 704-786-8189 and the facsimile number is 704-786-4447. This firm performs audits for Corvian Community School, Lake Norman Charter, Gray Stone, and Community School of Davidson. Fee \$9,500.

We also received a proposal from Rives & Associates, LLP and reviewed all charter auditors on the Treasurer's website.

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
For the first five years there is no projected working capital or other funds.	Shannon Sellers	Total Budget
No working capital or other funds identified.	Jessica Kelly	Total Budget
Will you not need an ELL teacher the first year?	Shannon Sellers	Personnel Bu
Will part time arts and PE teachers be able to meet this need for all of your students? No ELL teacher year one is concerning since earlier in application you stated the Hispanic population would be one of your target populations.	Jessica Kelly	Personnel Bu
How will the part-time PE and Art positions service the student body? How many times per week will students receive these services with a part-time capacity?	Shaunda Cooper	Personnel Bu
Operations Budget: 1)Advertising and Marketing allotments are very low. 2) Travel pertains to whom? 3) What are non-categorized expenses? 4) Substitute pay appears minimal.	Hilda Parlér	Operations B
The budget shows the PE and Art teachers will be part time based on the salary quoted. How will the student body be served with a these two positions being part-time?	Shaunda Cooper	Operations B
well constructed budget	Joe Maimone	Total Expend
How is working with Goodall Consulting not a conflict of interest with Mr. Goodall as your Board Chair? Who will sign the 10 checks that can be written during a month?	Shannon Sellers	Financial Au

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

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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).

monroecharter

Date: 09/19/2016

Applicant Signature:

The foregoing application is submitted on behalf of Monroe Charter Academy (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: monroecharter

Board Position: Eddie Goodall, Board Chair

Signature: _____

Date: 09/19/2016

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

Notary Public

Official Seal

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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
3	6

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

Initial Screening

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

External Evaluator

Mission, Purposes, and Goals	<p><u>Educational Need and Targeted Student Population</u> Please elaborate on what you mean when you state "the Academy's approach is more back-to-basics." - jessica_kelly</p> <p><u>Educational Need and Targeted Student Population</u> How will having to members that are fluent in Spanish break the underrepresented Hispanic population in charters across the state if the applicant is proposing a core knowledge foundation school? Currently, there are 27 CFA schools in the state of North Carolina according to the CFA website five CFA schools are in the Charlotte Monroe area? How will this proposed mission aligned with the target population of Hispanic students if it has not attracted Hispanic students already? - walter_finnigan</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>Educational Need and Targeted Student Population</u> Explain expectation of higher minority representation with no weighted lottery? - joseph_maimone</p> <p><u>Purposes of Proposed Charter School</u> How will you measure the goal of good relationships with parents? - scoopergrad</p> <p><u>Purposes of Proposed Charter School</u> The mission does not state at risk students. The increased learning opportunities are addressing at risk students and academically gifted students this is not addressed in the mission statement. - walter_finnigan</p> <p><u>Goals for the Proposed Charter School</u> Concerned about Financial Goal 3; why would you receive an unqualified auditors</p>
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	<p>opinion on your financials? - jessica_kelly</p> <p><u>Goals for the Proposed Charter School</u> How will you ensure you are meeting the citizenship part of your mission? What do you mean by unqualified auditor? Why wouldn't you want a qualified auditor to review your records? - shannon1974</p> <p><u>Goals for the Proposed Charter School</u> Goals could be even more specific. - a_quigley</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> Anson Charter Academy is mentioned in Paragraph 3. How is that school related? - jengnann</p> <p><u>Instructional Program</u> What is the relationship between Anson Charter Academy and Monroe Charter Academy? Anson Charter Academy is mentioned in the application regarding ELL students. Who are CCS teachers that are mentioned in the following sentence? "Teaching methods that CCS teachers may use.." - shannon1974</p> <p><u>Instructional Program</u> Is the title of the school "Anson Charter Academy" or "Monroe Charter Academy"? There may be a typo midway through the second paragraph. - robert_mcouat1</p> <p><u>Curriculum and Instructional Design</u> 10 workdays prior to start of school year is excessive in comparison to the 2 at the end of the year; will this be enough time for teachers to close out the year especially with the testing occurring until the very end of the year? - jessica_kelly</p> <p><u>Curriculum and Instructional Design</u> Testing should occur the last 10 days of school according to current testing policy. Your calendar only allows for 9 days of testing. Will 2 days of workdays at the end of the year be enough to close out the year? - shannon1974</p> <p><u>Curriculum and Instructional Design</u> How does the curriculum framework differentiate for the at-risk students and the academically gifted students mentioned in the earlier section of the application? - walter_finnigan</p> <p><u>Curriculum and Instructional Design</u> adequate - joseph_maimone</p> <p><u>Curriculum and Instructional Design</u> Where is the curriculum outline?</p> <p>Saxon Math - what is the research on this program and it's alignment to the common core? - a_quigley</p> <p><u>Special Programs and "At-Risk" Students</u> Just because a student struggles, doesn't necessarily mean he/she needs a referral to Exceptional Children. There is not mention of WIDA testing or ACCESS testing for ELL. Applicant should review ELL state policy. - shannon1974</p>

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<p><u>Special Programs and "At-Risk" Students</u> adequate - joseph_maimone</p> <p><u>Exceptional Children – Identification and Records</u> The child find section for exceptional children is very vague. The applicant should review requirements and address items such as 90 day rule. Formal evaluations should be conducted by a psychologist not an EC teacher. 504 implementation should also be reviewed and elaborated upon. - shannon1974</p> <p><u>Exceptional Children – Identification and Records</u> How will the community be aware of the schools Child Find obligations?</p> <p>Who has access to the child's confidential records? - robert_mcouat1</p> <p><u>Exceptional Children – Identification and Records</u> adequate - joseph_maimone</p> <p><u>Exceptional Children – Education Programming</u> Who are, "The staff of CCS will be aware of students with an Individual Education Program (IEP) or a Section 504 Plan." Will you be hiring outside help for IEP's and and 504's? What type of classroom assessments will be given to help identify exceptional children? Low performance doesn't necessarily indicate a disability. What do you mean by the "IEP will be updated regularly?" Law requires it be updated yearly. What services will The Academy provide for exceptional children? Will you provide inclusion? - shannon1974</p> <p><u>Exceptional Children – Education Programming</u> How does school decide who needs related services? How will school provide full continuum of special education services delivery?</p> <p>"The application indicates "The EC department will take every reasonable measure to prevent denials of equal educational opportunity ..." - Since students needs are met in the general classroom setting as well, shouldn't oversight of inequality be a general supervisor requirement by the school administrator? - robert_mcouat1</p> <p><u>Exceptional Children – Education Programming</u> adequate - joseph_maimone</p> <p><u>Student Performance Standards</u> What academic goals are set for year 1? Other than state requirements, what will be the requirements for promotion and retention? - shannon1974</p> <p><u>Student Performance Standards</u> clear and measurable goals - joseph_maimone</p> <p><u>Student Conduct and Discipline</u> What is the reasoning behind having writing as a consequence? - jengnann</p> <p><u>Student Conduct and Discipline</u></p>
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	<p>What is the time frame of the appeal process? - jessica_kelly</p> <p><u>Student Conduct and Discipline</u> How will you determine which consequences are given for level 2? In order for consistency, this policy should be reviewed. - shannon1974</p> <p><u>Student Conduct and Discipline</u> adequate - joseph_maimone</p> <p><u>Student Conduct and Discipline</u> Overall I believe this is a low pass. It meets the criteria but is fairly boilerplate and not unique in it's design. - a_quigley</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> 501(c)(3) Not obtained yet. - scoopergrad</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> Has not obtained at this time. - jessica_kelly</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> The applicant has 24 months to apply for tax-exempt status. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How is conflict of interest avoided with Anthony Rodriguez's participation on the board and participation by students in the Bill of Rights Institute, for whom he works? - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will having an out of state board member impact decisions? How much of an investment can they have if they are out of state?</p> <p>Will you also add staff selected representation to your board? - jessica_kelly</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will a board member from out of state be able to fulfill all the responsibilities for board members that you have stated? With a board member on the SIT, will this prevent staff from being as open in regards to the day to day operation of the school? What is the turn around time for a grievance that has been filed? How will the board be evaluated? Clarity is needed on the evaluation of the administrator. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Experienced and diverse experienced board a plus - joseph_maimone</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> In the application table on page 31, Davis and Brockman are not listed as educators, but have teaching licenses. It was noted within the application that they are educators. In what capacity did or do they serve as educators? - haparler</p> <p><u>Proposed Management Organization (EMO/CMO)</u> The school does not plan to establish a relationship with an EMO. - scoopergrad</p> <p><u>Proposed Management Organization (EMO/CMO)</u></p>

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	<p>Not applicable. - jessica_kelly</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NO EMO. - shannon1974</p> <p><u>Staffing Plans, Hiring, and Management</u> How will you ensure academic goals are met with not having full time teacher assistants in your younger grades (K-1)?</p> <p>No ELL teacher year one? Who will fulfill these responsibilities?</p> <p>Who will oversee the school financials, year one? - jessica_kelly</p> <p><u>Staffing Plans, Hiring, and Management</u> How many core teachers do you plan to hire? How will you attract teachers for the proposed salary if they have to perform dual roles? What is CCS? According to the application, "The principal must be committed to the mission of CCS and willing to work collaboratively..." Please clarify What is the process for hiring an ELL teacher? You give a job description for the Curriculum Coordinator but this position is not listed in your projected staff for the first 5 years at the top of this page. Please clarify why you have this listed? - shannon1974</p> <p><u>Staffing Plans, Hiring, and Management</u> adequate - joseph_maimone</p> <p><u>Staff Evaluation and Professional Development</u> What will the evaluation for teachers look like? What will be looked for? - shannon1974</p> <p><u>Staff Evaluation and Professional Development</u> The PLC component of professional development with a "coaching" emphasis will be implemented and will benefit beginning teachers tremendously. - haparler</p> <p><u>Marketing Plan</u> Can you clarify how the budget details play into the marketing strategy for recruiting students? - scoopergrad</p> <p><u>Marketing Plan</u> How will the marketing plan be adjusted to reflect the hope of having a more equally diverse student population than the local district? - jengnann</p> <p><u>Marketing Plan</u> no mention of hispanic outreach? - joseph_maimone</p> <p><u>Parent and Community Involvement</u> How will parents be involved in the day on a daily basis? - jengnann</p> <p><u>Parent and Community Involvement</u> Will the school have any outreach to their community? You state you will have leaders in the community come and speak. Please elaborate on the school's involvement in the community. - jessica_kelly</p> <p><u>Parent and Community Involvement</u></p>
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	<p>Have you begun to reach out to community leaders to speak? - shannon1974</p> <p><u>Projected Student Enrollment (Table)</u> This board has already had a new school approved for this round. This is their first school. They need to open 1 successfully before trying to open a second. - cheryl_turner</p> <p><u>Weighted Lottery</u> The school has chosen to not participate in the weighted lottery process. - scoopergrad</p> <p><u>Weighted Lottery</u> No weighted lottery. - jessica_kelly</p> <p><u>Weighted Lottery</u> The applicant does not plan to use a weighted lottery. - shannon1974</p> <p><u>Weighted Lottery</u> Lottery: On the family card are names of all siblings. Suppose there are no seats for all on the card? Would it be more prudent to say that when the family card is drawn, the siblings will be offered enrollment "If" there is a seat? - haparler</p>
<p>Operations</p>	<p><u>Transportation Plan</u> How will students with special needs with transportation written into their IEP receive transportation? - jengnann</p> <p><u>Transportation Plan</u> Will the bus transportation be available to all students? Will transportation be of cost to any families? - jessica_kelly</p> <p><u>Transportation Plan</u> It was a good idea to consult with Transportation Section Chief, Derek Graham. - haparler</p> <p><u>Healthy and Safety Requirements</u> Not signed by a person. - jengnann</p> <p><u>Healthy and Safety Requirements</u> Not signed by board chair. - jessica_kelly</p> <p><u>Facility and Facility Contingency Plan</u> experience a plus - joseph_maimone</p> <p><u>Facility and Facility Contingency Plan</u> Due diligence was done on facility options. - haparler</p>
<p>Financial Plan</p>	<p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> No working capital or other funds identified. - jessica_kelly</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> For the first five years there is no projected working capital or other funds. - shannon1974</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> How will the part-time PE and Art positions service the student body? How many times per week will students receive these services with a part-time capacity? - scoopergrad</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Will part time arts and PE teachers be able to meet this need for all of your students?</p>

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	<p>No ELL teacher year one is concerning since earlier in application you stated the Hispanic population would be one of your target populations. - jessica_kelly</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Will you not need an ELL teacher the first year? - shannon1974</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> The budget shows the PE and Art teachers will be part time based on the salary quoted. How will the student body be served with a these two positions being part-time? - scoopergrad</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Operations Budget: 1)Advertising and Marketing allotments are very low. 2) Travel pertains to whom? 3) What are non-categorized expenses? 4) Substitute pay appears minimal. - haparler</p> <p><u>Total Expenditure Projections (Table)</u> well constructed budget - joseph_maimone</p> <p><u>Financial Audits</u> How is working with Goodall Consulting not a conflict of interest with Mr. Goodall as your Board Chair? Who will sign the 10 checks that can be written during a month? - shannon1974</p>
OVERALL	

Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	<p>Mr. Maimone led the discussion and questions around the goals for the application were raised. Mr. Helton stated he thought that the outside evaluator comments lacked merit. Mr. Maimone outlined concerns around 1 board proposing to open 2 schools in the same year given the difficulties with accomplishing this task.</p> <p>Ms. Reeves questioned the number of board members who would remain on the board once approved. Ms. Parler asked questions on the parent involvement as outlined in the application. Ms. Reeves had concerns about the budget surplus and the drop in years four and five. Additionally, it seemed that there were there 3 members of this board that are also on the board for Charlotte Classical board, Union Academy, and Union Day.</p> <p>Mr. Rodriguez provided an overview of the proposed student population and where the school proposes attract students. Specifically, the school would pull from the surrounding counties to reflect the student population in Monroe for grades K 5. Additionally, he had conversations with prominent leaders from the area to inform their targeted student population. Mr. Rodriguez communicated the plan is to use MAP testing to measure student progress and goals would be adjusted if needed. He also explained the role the Bill of Rights organization would have on the proposed schools professional development. While free, the teachers would need to pay travel costs. Mr. Maimone questioned the tenure of Mr. Rodriguez on the board since he was out of state to which he responded having no plan to roll off the board and he planned to attend board meetings via skype, etc.</p>

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Education Plan	Mr. Goodall outlined approximately \$60,000 was assigned in the budget to help with the Core Knowledge training. Mr. Helton asked if the school planned to use the Core Knowledge Reading program and Mr. Rodriguez responded that would be the plan.
Governance and Capacity	<p>Mr. Goodall responded to questions on the capacity of the board to successfully open 2 schools in the same year. He outlined the impetus of his firm and outlined no relationship existed between this board and the aforementioned schools. He responded the principal would be the leader and face of the school to assist with recruiting and day-to-day operations.</p> <p>Mr. Helton asked specifically when the board would hire its proposed principal. Mr. Rodriguez outlined the school had already held its first fundraiser to be ready to hire the future leader. Mr. Goodall responded he hired the Headmaster at Union and Union Day and the salaries those people accepted from previous 2 processes. Additionally, it would be beneficial to go through the hiring process once for finding the Principals for the schools.</p>
Operations	<p>The facility was questioned by Mr. Maimone to which Mr. Goodall responded the prospective had been presented and they were willing to work with them as well as outlined the modular companies the board had worked with. The proposed property was around \$80,000. He also outlined the student population for Monroe and that it would be the first property to embrace the "at-risk" student. With the buses the plan was to lease the transportation service Eagle Bus Service in the first year to not have to invest time in the first year.</p> <p>Ms. Sutton asked a question on the board choosing not to use a weighted lottery given its proposed student population. Mr. Goodall outlined he did not think they would need one in this situation given the people they choose to work with although Union Academy has not reached that specific population historically. Mr. Rodriguez communicated a weighted lottery was not needed because the Hispanic population had not been tapped in the area; so therefore, he did not see the need.</p> <p>Mr. Walker asked specific questions on the location between the established Union Academy and the proposed school to gain a better understanding of the demographics. Mr. Maimone asked a direct question on the ELL teacher not originally outlined in the application. Mr. Jim Stegal(sp) provided limited information on the ELL population in the proposed area. Mr. Rodriguez outlined the contracted services covers the lack of an ELL teacher and the plan was to hire an ELL teacher in year 2. One proposed member outlined that he was from Anson but works in Monroe and disadvantaged students will be equally balanced.</p>
Financial Plan	
OVERALL	Mr. Maimone outlined he originally came with concerns with 2 schools being proposed by one board. Ms. Sutton asked questions on how this application does not fit the definition of replication. Specifically, should not the board wait the two years when results are in to truly judge effectiveness and appropriateness of this decision? Mr. Walker reminded the board of the prior Emereau approvals. Ms. Turner reminded the board that the Emereau board subsequently withdrew. Mr. Walker responded that he had no concerns. Ms. Turner outlined as a matter of principal it was not a good idea given there will be no data to support granting 2 charters in the same year.

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	<p>Ms. Gibbs made a motion to move the group forward to begin Ready to Open. Ms. Parler seconded. Mr. Hawkes outlined the economies of scale and experience speaks to many advantages for this board. Mr. Wilkinson added comments on urgency and urged the board to support the motion. The motion passed 6 to 3. Ms. Turner, Ms. Reeves, and Ms. Sutton dissented.</p>
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Overall Summary	
<p>Initial Screening 09/30/2016</p>	<p>The Office of Charter Schools deemed this application complete on September 30, 2016. No further information is needed to begin the evaluation of this application.</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. 4 board members and 1 community member was present for the clarification/review opportunity.</p> <p>Ms. Parler questioned the Core Knowledge curriculum. Ms. Turner outlined the CSAB had approved the same application with an earlier application in this application round and her concern was about the capacity and a new board receiving a second school.</p> <p>The Performance Committee outlined there were no fundamental issues with the application and wanted to know the distance between the 2 proposed school (Anson Charter Academy and Monroe Charter Academy). Mr. Hernandez outlined it was about 20 minutes between the 2 campuses. Mr. Quigley questioned the analysis outlined in the application to which Mr. Hernandez responded. He outlined the board had done its research and that the Hispanic population would be more in the proposed Union campus. Another board member provided additional information on the Hispanic population and what it needed do to connect to the demographic. Also, she outlined her past experiences in education and her passion for the model.</p> <p>Mr. Sanchez drilled the targeted student population and the reason the board decided not to have a weighted lottery. Mr. Goodall and Mr. Hernandez outlined the reasons the board did not think they would need the weighted lottery. Additionally the relationship with community members and providing transportation eliminated the need for a weighted lottery.</p> <p>Mr. Goodall outlined the one member added to the board that represented Union County. Additionally, the difficulty with Anson standing alone, was it is tough financially to have a charter school sustain itself. A sister school using efficiencies of scale would be beneficial for both the Anson and Union campuses. Mr. Goodall referenced the Lee and Durham school applications and the reason the CSAB declined those applications. He pointed to the need in Union County with some data to support his stance.</p> <p>Mr. Maimone questioned the board on the challenges of opening 2 campuses. Mr. Hernandez outlined the contract with Goodall Consulting would assist the school with handling a timely opening and hiring, and purchasing Core Knowledge resources etc. Additionally, he outlined his role and the role of other board members to help the board reach its goals. The board already had the buildings and had already held a fundraiser. Mr.</p>

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	<p>Goodall outlined how the board would recruit using a system from NC Department of Public Instruction (NCDPI). He outlined the board is new but not new to the work.</p> <p>Mr. Goodall discussed the business support he would provide for the schools. He outlined the Ready-to-Open process is much improved and he would step down from the board if approved. Mr. Quigley questioned the conflict of Mr. Goodall being the board chair and the contract the school was entering into with GoodallConsulting. Mr. Goodall referenced General Statue regarding conflict of interest and his willingness to guide the board. He assured the CSAB that he would step down and be in the contractor role should the applicant be approved.</p> <p>Mr. Quigley made a committee motion to allow an interview for Monroe Charter Academy. Ms. Turner seconded. The motion passed unanimously.</p> <p>Mr. Quigley made a motion to the full CSAB to allow an interview for Monroe Charter Academy. Mr. Helton seconded. The motion passed unanimously.</p>
<p>Application Interview</p>	<p>The Office of Charter Schools provided a brief update on the proposed school. 5 proposed board members introduced themselves to the CSAB and provided a brief professional history and explained their respective role on the board of directors for Monroe Charter Academy. 1 advisory board member for the proposed school was present for the interview.</p>
<p>OVERALL</p>	<p>Ms. Gibbs made a motion to move the group forward to begin Ready to Open. Ms. Parler seconded. Mr. Hawkes outlined the economies of scale and experience speaks to many advantages for this board. Mr. Wilkinson added comments on urgency and urged the board to support the motion. The motion passed 6 to 3. Ms. Turner, Ms. Reeves, and Ms. Sutton dissented.</p>