



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:

Kenneth Tucker
Cheryl Turner
Amy Ruck Kagan
Alex Quigley
Alan Hawkes
Shaunda Cooper
Steven Walker
Jennifer Gnan
Jonathan Bryant
Lynn Kroeger
Robert McOuat
Deborah Brown

Date of Review:

09/27/2017

Academy of Excellence Charter School - The Academy of Excellence Charter School's mission is to provide a quality academic experience with the collaboration of parents, teachers, and the community that cultivates 21st Century learners for global success.



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Academy of Excellence Charter School

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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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Academy of Excellence Charter School

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: *Academy of Excellence Charter School*

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: *Darrell Peterson*

Title/Relationship to nonprofit: *Administrator*

Mailing address: 612 South Race Street
Statesville NC 28677

Primary telephone: 704-873-9727 Alternative telephone: 704-500-4475

E-Mail address: academyofexcellence612@gmail.com

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

County: IREDELL

LEA: 490-Iredell-Statesville 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?

No:

Yes:

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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? Academy of Excellence Charter School

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2019 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
Year 1	K,01,02,03,04,05,06,07,08	100
Year 2	K,01,02,03,04,05,06,07,08	110
Year 3	K,01,02,03,04,05,06,07,08	121
Year 4	K,01,02,03,04,05,06,07,08	133
Year 5	K,01,02,03,04,05,06,07,08	146

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.

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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.

academyofexcellence

Mr. Darrell Peterson

Signature

Title

academyofexcellence

09/22/2017

Printed Name

Date

Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>This application was incomplete and the deficiencies were not remedied within the allowed time. Pursuant to State Board Policy CHTR-012(b) "The Charter School Advisory Board . . . shall reject all incomplete applications."</u>	<u>Steven Walker</u>	<u>Cover Page</u>
<u>After reviewing the survey data that was submitted in appendix A, it appears that only 65% of the 117 families surveyed showed high and moderate interest in attending the school. How was the first year enrollment determined? At 76 students roughly, does this plan account for siblings?</u>	<u>Shaunda Cooper</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Kenneth Tucker</u>	
<u>Cheryl Turner</u>	<u>Fail</u>
<u>Amy Ruck Kagan</u>	<u>Pass</u>
<u>Alex Quigley</u>	
<u>Alan Hawkes</u>	
<u>Shaunda Cooper</u>	<u>Pass</u>
<u>Steven Walker</u>	<u>Fail</u>
<u>Jennifer Gnann</u>	<u>Pass</u>
<u>Jonathan Bryant</u>	<u>Pass</u>
<u>Lynn Kroeger</u>	
<u>Robert McQuat</u>	
<u>Deborah Brown</u>	<u>Pass</u>

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

The Academy of Excellence Charter School's mission is to provide a quality academic experience with the collaboration of parents, teachers, and the community that cultivates 21st Century learners for global success.

Clearly describe the mission of the proposed charter school:

The Academy of Excellence Charter School will create a learning environment that will motivate, challenge, and nurture students through data-based decision-making and problem solving techniques. Our focus is to support parent-child relationships through educational solutions that will prepare students for North Carolina's higher educational institutions. We believe that excellence is not the exception but it is the standard.

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 Iredell-Statesville County Public school district consists of 51 public schools; 23 elementary schools, 14 middle schools, 8 high schools, and 6 alternative schools. This district is more diverse than most in the surrounding districts. Iredell-Statesville community has an ethnic breakdown of 81% Caucasian, 28% African-American, 4% Hispanic/Latino, and 2% Asian. This diversity gives the community a unique opportunity to model the challenges and benefits of a global community within the community. The Iredell-Statesville public school system consists of approximately 29,052 students. Of those students, 4,186 are in grades K-8 which represents 19% of the overall student body for this school district.

- 2. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA is grades 9-12).*

Academy of Excellence Charter School, with a projected opening enrollment of 100 students will target populations in grades K-8. This 100 students represent 0.7% of the Iredell-Statesville school's Average Daily Membership(ADM). In the second year of operation our projected enrollment will increase by 10 students which still represents 0.7% of the ADM. In

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years

3-5, we Academy of Excellence Charter School, with a projected opening enrollment of 150 students will target populations in grades K-8. This 150 students (ADM). In the second year of operation our projected enrollment will remain at 150 students which still represents 0.7% of the ADM. In years 3-5, we have used a formula of 20% increase per year of our student body, yielding

enrollment for year 3 to be 180 students which represent 0.8% of the ADM; year 4 enrollment is 216 which represents 1% of the ADM; and year 5 enrollment is 259 students which represents 1.20% of the ADM.

Iredell County's attractive lifestyle is drawing new residents and businesses to the area every day. It is the 6th fastest growing county in North Carolina. That means that more students enroll in our public schools each year. Many of the schools in this district are overcrowded, aging, and in some cases, in serious despair. Iredell County has more mobile classroom units than any other county in the state because of the increasing number of enrollment.

There are many students in our public school system who are simply not learning at the pace of the traditional educational standards and objectives. Academy of Excellence Charter School will have very positive impact on our local LEA by streaming students who may not be performing to their grade level or simply adjust better to smaller classroom settings. In smaller class settings, students have the opportunity to have their needs addressed specifically. In doing so, this supports the No Child Left Behind Act of 2001.

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

Academy of Excellence Charter School will compare with the local LEA as well as with the state in achieving the objectives of the core curriculum. However, we have always believed that learning is a natural and primary occupation for humans. It seems that for young children, curiosity is an astonishing source of energy. They explore, manipulate, and question. They seek out the novel and seem truly eager to find understanding. Something inside compels them to master the challenges of their young lives. The question becomes how to do we allow the natural curiosity to grow within the environment we call the "school". Today's students are different from those even a decade ago. They are growing up in a digital age that is changing very rapidly. All research tells us that those born into this new culture learn its languages very easily, while they resist using the old. We have faced the fact that our children are no longer the people our educational system was designed to teach. These children work best in participatory environments and a significant part of their literacy is digital. Their attention spans are more limited and they demand more than to consume information. Instead, they want to create, evaluate, synthesize, and share information. They do not want to work alone at their desks. These new age children are collaborative learners and want to learn by doing. These students are multi-taskers who are more comfortable jumping into situations not knowing ahead of time what the outcome will be. Our teaching will focus on what is relevant for this 21st Century: academic skills and the development of character. Knowledge must be open, accessible, and collaborative. We will present knowledge through a wide range of multimedia. We will take the curriculum that is already overburdened with content and find what is truly important to know so that we can leave time for students to develop the skills necessary to succeed in the coming century in the

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areas of critical thinking, communication, creativity, and collaboration. The focus of Academy of Excellence Charter School in this modern education era will be to create a balanced environment for students between the worlds of intrinsic satisfaction and external rewards. To be properly motivated students need to see a clear relationship between their behavior and a desired outcome. But, we will also see that rewards are not too controlling in their nature, thus producing a sense of alienation of a system where human beings work only for material reward.

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.*

Our intervention model is anchored in research on successful pathways in student's development. We focus on needed psychological services and family supports as well as constructive strategies that help vulnerable students successfully navigate or overcome structural constraints that they face in their daily lives. Undergirding the intervention model is a year long interdisciplinary curriculum designed to develop skills required to thrive and prosper in the highly volatile global economy of the 21st Century. Technological innovations in learning that accelerate remediation and academic advancement and sustained parent/caregiver involvement in the education process.

By leveraging these components of the intervention model, the Academy of Excellence Charter School's education mission is to change the aspirations and expectations, foster pro-social behavior, reduce problem behaviors, alter study habits a time spent in non-productive activities, facilitate greater parental involvement in the child's education, embed students and their families in a network of community bridging institutions, reduce levels of family stress and disorganization, improve parent-child relationships, and enhance student academic achievement, with every child performing at grade level in all academic subjects at the end of each school

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year. Academy of Excellence Charter School is committed to providing our students ample exposure to various collegiate environments through academic competition and college tours with established partnerships with a number of colleges and universities.

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.*

The are specific measurable goals by the end of 2022-23 School Year

1. SCHOOL OPERATIONS

- a. Retained at least 95% of their eligible students in each of the previous years.
- b. Maintain a friendly and inviting atmosphere for prospective families.
- c. Maintain a staff of Board certified educators.

2. ACADEMICS

- a. 90% of all tested students in grades 3-8 will perform at the proficient or advanced level on the EOG.
- b. 90% of all students assessed using MAPS assessment will show at least 1 year of growth in reading from the year prior.
- c. 90% of all tested students in grades 3-8 will perform at the proficient or advanced level on the EOG.

3. FINANCE

- a. At the end of 2018-19 SY, annual financial audit will show no adverse findings.
- b. At the end of 2018-19 SY, AO ECS revenues will be greater than its expenses resulting in a surplus of funds.
- c. constant budget monitoring by Finance Officer.
- d. Monthly meetings to report updated financials.
- e. AO ECS will complete an annual audit.

4. GOVERNANCE

- a. Operate with a fully functioning board that will hold monthly meetings and advertise meetings to the public.
- b. Maintain a high level of parental engagement.
- c. Engage in community and business partnerships
- d. By June 2019, AO ECS will have partnered with at least 5 business/community organizations which align with school mission.
- e. By June 2023, AO ECS will have at least 20 solid business partnerships.

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

During monthly Board Meetings, the Curriculum and Instruction Committee will present a detailed report of student performance and quarterly assessments to

the Board of Directors. Information of student performance all CORE subjects will be presented to show student growth or decline. If there is a decline based upon assessment information, the Curriculum and Instruction Committee will confer with the teaching staff to make necessary adjustments to the mode of teaching first. Secondly, all teachers will make an

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assessment of any learning gaps within the student body per CORE area. Thirdly, the actual curriculum design may be adjusted to accommodate students as they progress toward academic balance according to their specific grade level.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
What research supports your statements that smaller class sizes will result in academic success? How will you measure "excellence"? What do you mean by, "very positive impact on our local LEA by streaming students who may not be performing to their grade level"?	Deborah Brown	Mission Stat
Please explain why the enrollment chart does not match the narrative provided here. Further explain how the proposed school will differ from the LEA. A list of characterizations of students does not do that. The data shown in A1 shows that the students of the district are performing at or above state average.	Jennifer Gnann	Educational
Stating that 87% of respondents are interested in learning about AECS is somewhat misleading - 22% of these responded "slightly interested." Academic justification for need is that there is potential for higher scores, but data included in appendix A indicates that students in Iredell Co are performing similar to other students in the state. The spelling and overall writing of this application is confusing - it also appears to contain conflicting information. Is there research that shows smaller class sizes or NCLB are guides that increase achievement?	Jonathan Bryant	Educational
How is what you are proposing different from the local LEAs?	Deborah Brown	Educational
Which specific curriculums will be used to obtain the described learning environment that the target market requires? While observations regarding the learning tendencies of 21st century youth, and how that differs from previous generations, how these tendencies will be taught differently from existing schools is unclear.	Amy Ruck Kagan	Educational
What is the research you have used as a basis for your model? Which of the 6 legislative purposes are you targeting?	Deborah Brown	Purposes of
Can you provide more information on how the school will utilize partnerships with area universities?	Shaunda Cooper	Purposes of
To which Legislative Purpose is the school aligned?	Jennifer Gnann	Purposes of
Would like to see more quantitative and measurable tools that demonstrate how goals will be accomplished.	Amy Ruck Kagan	Purposes of
How do you know that 90% on grade level is a reasonable and attainable goal for your targeted population?	Deborah Brown	Goals for th
How will many of these goals be measured (maintain a friendly atmosphere....constant budget monitoring...maintain a high level of parent engagement...etc.)? what does "fully functioning board" mean? What is intended by partner with at least 5 business/community organizations - is this describing a vendor relationship, a service partnership, etc.?	Jonathan Bryant	Goals for th
The academic goals seem unrealistic based on baseline data provided in A1. How will the governing board know if the school is successful? Having a report provided doesn't show success.	Jennifer Gnann	Goals for th
What percentage of the staff does the school propose will be board certified? Does the school have a nominal target for surplus funds?	Amy Ruck Kagan	Goals for th

Reviewer	Score
Kenneth Tucker	
Cheryl Turner	Fail
Amy Ruck Kagan	Fail
Alex Quigley	

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Alan Hawkes	
Deborah Brown	Fail
Shaunda Cooper	Pass
Robert McOuat	
Lynn Kroeger	
Jonathan Bryant	Fail
Jennifer Gnann	Fail
Steven Walker	Fail

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.

Academy of Excellence Charter School exists to provide a rigorous academic and moral education for students, enabling them upon graduation to be successful at selective secondary schools across the nation. This is accomplished with a curriculum that embraces environmental sustainability, technology as a learning tool, and analytical inquiry in an environment where love is the basis of state. We strive to create within our students a love of learning, intellectual curiosity and a sense of duty to the community, thereby enabling them to make thoughtful and morally informed decisions throughout their lives. Instruction is student-centered while mixing experiential and project-based learning with traditional discussion-based inquiry, while fostering the development of human virtue. We seek to continue to be a progressive agent in education that will adapt to a changing world and with it, address ever more complex problems to address. Our intention is to have students feel together (community), but think for themselves (intellectual independence), rather than have those who think together while feeling alone.

In creating curricula for each grade and subject area, administrators and teachers will adhere to North Carolina's Core Content Curriculum Standards. Academy of Excellence Charter School believes that students need to understand the interconnectedness of subjects in order to fully absorb the meaning of their lessons and see how they relate to everyday life.

Following are examples of how the Lower School (grades K-4) and Upper School (grades 5-8) divisions will be incorporating these basic tenets in their units:

1. Academic rigor/Pursuit of excellence:

Academic rigor and the pursuit of excellence are infused in both the overt and subtle curricula of Academy Excellence Charter School. Our central mission of preparing children for success at leading secondary schools and our founders exemplary placement records at previous institutions will serve as solid guides as we develop a system of academic rigor and emphasis on the pursuit of excellence.

2. Moral Education:

Teaching students to make good, moral choices is critical to the mission of Academy of Excellence Charter School. Creating an environment characterized by trust, respect and warmth is the first step to moral education. In order

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ACADEMY OF EXCELLENCE CHARTER SCHOOL

to create this environment, all adults in the building must model appropriate behaviors and choices.

3. Encouraging Love of Learning:

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The careful selection of teachers is critical to encouraging a love of learning. When teachers love what they are doing as well as the students they teach, children feel it and develop a true passion for their work. A curriculum that is relevant to the students is also critical when encouraging a love of learning. Curricular development and design always keeps the students in mind, and includes a great deal of student-driven instruction. Creative assignments and a cooperative approach to teaching allow students to express their own views and develop a personal voice.

4. Attending to Diverse Learning Styles:

Academy of Excellence Charter School recognizes that children learn in different ways. We employ a cooperative approach to education and train our teachers in differentiated instruction. For those students in need of additional support, we recruit tutors from local universities and partner with local organizations for supplemental services. We understand that many of our top performing students will require academic enrichment. For those students we will offer Honors Seminars in the middle school grade levels. Additionally our Accelerated Reader program not only encourages independent reading, but also allows students to be continually challenged by literature.

Curriculum and Instructional Design:

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

The academic program at Academy of Excellence Charter Academy will prepare its students to meet or exceed the performance standards set forth by the North Carolina Department of Education. We will offer a rigorous curriculum based in the four major core content areas of English/language arts, mathematics, science, and history-social science, with special emphasis placed on mathematics and science. Students will also be offered courses in art and physical education, and other elective courses such as technology and health. Life and study skills will be embedded in the daily curriculum and classroom activities, creating a holistic educational experience for our students. All instructional activities will be site-based, with students in grades K 8 grouped in mixed grade level cohorts.

Academic looping is the practice of advancing a teacher with his or her students over a period of two or more years. Mixed grade-level cohorts will serve as an ideal structure for this practice to occur. The instructional design of the school was created based on extensive research surrounding the best practices for serving a diverse population. This information was used in part to develop the schools academic program, which is open to all students interested in attending, and features the following elements:

I. Academic Looping

Allow students to remain with their cohorts and with the same teacher for a period of two to three years. The advantages of learning amongst the same peer group and with the same teacher for multiple years can be immeasurable. The traditional single-year pattern is particularly stressful for children in the primary grades, and looping is ideal for reducing anxiety in these critically formative years. During the middle school years, the stability provided by looping may be even more important as students battle the hormonal and physical changes that occur in adolescence.¹ For a student who may have an inconsistent home life, the security and structure found in a looping classroom can have tremendous benefits on his or her emotional well-

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being, and hence, on his or her academic achievement.

II. Mentoring and Multi-grade Grouping

Employs multi-grade cohorts for several research-based reasons. Multi-grade grouping organically leads to mentoring and mentors. A mentor provide a trusting relationship and safe environment and is known for being available to answer lifes difficult questions. They are good listeners and are willing and able to share ideas and help students develop values and successful practices. Unfortunately, a disproportionate number of diverse students have no father in the home. The school will attempt to fill this "fatherless" void of many students through the opportunities presented by mentoring and mentorship. By using multi-grade cohorts, both natural and planned mentorship arrangements will occur. Natural mentorship arrangements develop within the normal or organic sequence of everyday life, and in the case of the school, within the context of everyday classroom activities. Planned mentorship arrangements happen when deliberate attempts to match a student with a mentor are made.¹ The school will ensure that every student is involved with both a peer and an adult mentor as part of their academic program.

III. Collaborative Work Environment

It is important that in a class comprised of diverse students, learning is organized as a social event. Providing instructional opportunities that allow for social interaction acknowledges the affective needs of diverse students and increases opportunities for them to fully engage in learning activities. Moreover, brain development and social development, particularly in students in the elementary years, are extremely intertwined so to effectively teach diverse students, curriculum must be designed so that classroom activities are group centered. This allows students to support one another, exchange ideas, and collaborate about the

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 curriculum design will reflect alignment with the North Carolina Standard Course of Study and the proposed charter school will participate in ABC's Accountability Model and conduct the statewide testing. The curriculum design will be integrated within and across all subject areas. The community will serve as an educational resource for each teacher and student. Teachers, students, parents, and all stakeholders will be engaged in the process of developing life-long learning skills.

The School will meet all statewide standards and conduct the student assessments required pursuant to North Carolina Education Code, and any other statewide standards authorized in statute, or student assessments applicable to students in non-charter public schools. Links to the content standards in the four core areas are listed below:

English/Language Arts

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Mathematics

Science

History/Social Science

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

The teacher competencies critical to student achievement have changed significantly. To teach effectively, teachers must possess a rich understanding of pedagogical and content-specific knowledge. Teachers will add to their instructional repertoire as their instructional skills will only evolve if they learn new methods and approaches. They must demonstrate an extensive knowledge of practical strategies, and be accomplished in the skills needed to teach their students. Teacher and student learning must be inter-connected. We will improve the tools of our educators through the following six features of instruction that efficiently accommodate and accelerate student learning.

1. Big ideas, concepts, and principles that facilitate the most efficient and broadest acquisition of knowledge across a range of examples.
2. Conspicuous strategies that are an approximation of the steps experts follow covertly to solve complex problems and difficult tasks.
3. Primed background knowledge before the understanding of new information can occur, necessary background knowledge must be taught or "primed". This requires teaching component steps and concepts that allow an in-depth understanding of a big idea or strategy.
4. Mediated scaffolding which refers to the guidance, assistance, and support that a teacher, peer or task provides to a learner.
5. Judicious reviews that will be (a) sufficient for initial learning to occur, (b) distributed over time, (c) varied for generalization, and d) cumulative.

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.*

Academy of Excellence Charter School instructional plan and graduation requirements will be in keeping with our local LEA standards and will comply with the North Carolina Department of Education guidelines. Our instructional program is designed to enforce the No Child Left Behind Act and as such we have allowed for children of all different learning capacities to be accommodated. Through advanced instruction models and the enhancement of our educator skills we are confident that our students will be more than ready to advance from one grade to another. Of course, we will use End of Grade standardized testing as a final assessment of student performance and readiness.

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

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

The academic calendar will consist of 185 school days and will align with the Iredell-Statesville public school calendar with an exception of an additional five (5) days of attendance. Our school year will operate on a 9 week quarter basis, two quarters per semester. At the end of each quarter there is a scheduled teacher's workday. Mid-quarter progress reports are sent home at 4 1/2 weeks.

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.*

Academy of Excellence Charter school will use Differentiated Instruction for students who are performing below expected levels. Differentiated instruction comes with the realization that to meet our high expectations for our students, we must recognize their individual instructional needs. The following differentiation strategies will be used:

I. Differentiation BEFORE a Lesson

Teachers will carefully plan lessons that will address each student's learning needs by doing the following:

A. Reduce difficulty

B. Reduce sub-skills

II. Differentiation DURING a Lesson

A. Use multiple teaching strategies such as

1. Tiered Assignments

2. Varying Questions

3. Learning Centers

B. Adjust the length of instructional time

III. Differentiation AFTER a Lesson

A. Use individualized assessments

ACADEMY OF EXCELLENCE

A. In-class intervention

B. Remediation-After School tutoring

Low performing students will be monitored through a progress tracking system that will track mastery of objective skills to ensure student continued progress and academic growth.

2. *Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:*

a) *Methods for identifying ELL students.*

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

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

1. Academy of Excellence Charter School will use the State Education Department's process for identifying students who are English Language Learners (ELL) as follows: 1) Home Language Questionnaires will be used to screen all new enrollees for potential limited English proficiency; 2) If the home language is other than English or the student's native language is

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other than English, appropriate school staff shall conduct an informal interview in the students native language; 3) If the student speaks a language other than English and the student speaks little or no English , the school will administer the Language Assessment Battery-Revised (LAB-R). A score below the designated cutoff score for the child shall determine eligibility for services. The LAB-R shall be administered only once to each incoming student. All teachers will receive professional development training on technique for supporting students who have English language deficiencies and on communicating with students designed as ELL students and their parent/guardian(s). Such activities will focus on the language, cultural heritage and instructional methodologies, including ESL methods for teaching content areas, and support services appropriate for learners of a second language. Any student suspected of having limited English proficiency will be tested to determine if and what level of services are needed.

We seek to recruit large numbers of ELL students, as we know that they continue to lag behind their English speaking peers in academic achievement. We will focus outreach efforts in Spanish speaking communities and local Latino Arts and cultural organizations. If we enroll at 25% of Spanish speaking students we will consider providing a dual language model. If, however, we recruit less than 25%, we will follow the model described above to meet the needs of ELLs. The school ensures that ELL students will not be excluded from curricular or extra-curricular activities based on an inability to speak and understand the language of instructions, and also that ELL students will not be assigned to special education because of their lack of English proficiency. Parental outreach may also be conducted through home visits by a school official and an interpreter. Our recruitment materials will be in both Spanish and English ensuring we welcome all student members of our community.

2. 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. Ensuring that our English Language Learners are not "left behind" is a critical goal at Academy of Excellence Charter School. We will use the research validated E.L. Achieve matrix as a rubric for our Ells. Students will be assessed quarterly, or as often as the ELL teacher will develop an action plan for each student not meeting quarterly targets. Teachers will also be required to group students homogeneously for language support.

3. Proficiency of an identified ELL student in the English language will be measured at least annually to determine whether continued special services are needed. Students who are identified as limited English proficient are required to be tested annually. The ACCESS for ELLs in North Carolina's required assessment that complies with title III of federal No Child Left Behind (NCLB) legislation of 2001. Beginning with the 2017-18 school year, NCLB has required states to provide an annual assessment of English Language proficiency in the areas of listening, speaking, reading, writing, and comprehension in English to all students identified as Limited English Proficient (LEP) in the schools served by the state. Due to federal legislation, all students identified as LEP are tested annually on state designated English language are tested annually on state designated English language proficiency test during the window established by the state to decide student progress for proficiency.

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

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the following:

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

1. Academy of Excellence Charter School will use very extensive assessments of all students to identify those who are exceptional or gifted. All new students will be given a needs assessment in Word Reading, Reading Comprehension, Math concepts and applications, and Math computations. This allows our staff to design an instructional program that will make the student successful.

2. Academy of Excellence Charter School will provide an accelerated program. Student selection is based upon their high scores on the North Carolina End-of-Grade test, the Assessment test, Performance Series grade level test, and through teacher recommendation. Students must score in the 97th percentile or higher in either Reading or Math to be considered for the Accelerated Program.

Exceptional Children

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

Identification and Records

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

1. Academy of Excellence Charter School will work with the Iredell-Statesville public school district to identify the special needs of students and to meet all applicable state and federal requirements including individuals with Disabilities Act (IDEA) and G.S. 115C-238.29F(g) (5). Exceptional students with disabilities, regardless of the nature of the severity of their disability, who need special education and services, will be served in the least restrictive environment as possible. If a student has been previously found to be eligible for special education services there should be an Individualized Education in his student file.

2. Child Find requires all school districts TO identify, locate and evaluate all children with disabilities, regardless of the severity of their disabilities. This obligation to identify all children who may need special education services exists even if the school is not providing special

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education services to the child.

Academy of Excellence Charter School instructional staff will be properly trained on identifying students with disabilities and special needs. When a child is suspected of having a disability or need of special education, whether it be through a teacher or parent or perhaps, the student themselves, the process is initiated as follows:

- A. Teachers provide evidence of what they have done to help a student to be successful prior to referral.
- B. Referral to local district for evaluation.
- C. IEP developed and implemented by Special Education teacher.
- D. Student will be re-evaluated every three (3) years.

3. (1) Academy of Excellence Charter school will submit a "release of Information" form signed by the parent to the previous school requesting records.

(2) Once records are received, they can only be reviewed on a "need to know basis". (i.e Administrator, teachers) Records will be maintained in a locked filing cabinet in the administrative office. All persons who participate in the collection or use of confidential information will receive training in the policies and procedures for handling confidential data.

(3) EC teacher will be responsible for conducting annual reviews and re-evaluations in order to meet compliance expectations.

Exceptional Children's Education Programming

1. *Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
2. *Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*
3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
4. *Describe the proposed plan for providing related services.*

1. Academy of Excellence Charter School is interested in providing an inclusive education for all students. Our school will contract with the necessary agencies, within budgetary constraints to provide related services for students with identified needs. To address these needs, the school will hire a full time special education coordinator/teacher, implement an inclusion program, practice differentiated instruction, and partner with service providers. The services to be provided may include but are not limited to, speech-language pathology, audiologists, psychological, physical and occupational, therapeutic recreation, orientation and mobility, diagnostic and/or evaluative medical, and student and/or parent counseling.

2-4. Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.\

1. Teachers will use differentiated instruction to meet student needs. Frequent formative assessments determine the extent to which content is learned prior to a summative assessment.

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2. Summative assessments in the form of unit tests, papers, projects, presentations, and demonstrations indicate mastery of content. Teachers reteach and reassess as necessary. 3. Encompasses the classroom instruction outlined above and additional "need-based learning". Students who are identified through standardized assessments and teacher observation as performing below grade level receive additional support in the classroom.

4. This support could come from the classroom teacher or an interventionist who is assigned to the classroom.

Students receive more frequent progress monitoring to determine academic growth. The students are supported and monitored for nine weeks.

5. If students have an Individualized Educational Plan (IEP) goal they are not supported by an interventionist as they are supported by Exceptional Children's staff.

6. Addition of "individualized learning". Students who do not make accelerated progress after nine weeks of receiving Tier II instruction are identified as students who need "individualized learning. "An

interventionist, who is a certified teacher, formulated to the specific students needs along with

individualized assessments. If the student is not making accelerated progress after five weeks, a child

study is initiated and the students study team meets to recommend and implement additional strategies to

assist the student. If an ACADEMY OF EXCELLENCE student is not making accelerated progress to grade level, they are referred for Exceptional

Children testing.

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.*

Academy of Excellence Charter School will serve students in grades K8; therefore, children in grades 3-8 will be required to take the NCSAT exam at the time and in the manner mandated by the State Department of Education for all public schools. Test results will be used in order to make adjustments to the school curriculum, prescribe differentiated instruction to individual students and inform families of their students learning with both technical and narrative information to ensure that students are academically prepared to be successful at competitive secondary schools. Special needs students will take the statewide assessment following any accommodations or modifications stated in their IEP unless they have been exempted by their IEP. Students who are eligible for accommodations or modifications under

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Section 504 of the Rehabilitation Act of 1973, but have an impairment of a major life function such as performing manual tasks, walking, seeing, hearing or speaking, will be provided testing accommodations or modifications as specified in the student's accommodation plans and will be consistent with the instruction and assessment procedures in the classroom. Upon becoming enrolled in the school and at the start of each academic year, students will be assessed in math, language arts, and literacy in order to determine skill levels. Assessment data will be used as part of a two-pronged approach to developing curriculum. Teachers will assess the development of students soft skills, such as communication skills, conflict resolution and negotiation, personal effectiveness, creative problem solving, strategic thinking, and team building, using classroom observations and school developed assessments. Students that are found to be struggling with social and emotional growth will work with teachers and specialists to further develop these skills and use them to further improve in their academic assessments.

At Academy of Excellence Charter School, parents and students are encouraged to have an ongoing and positive relationship with teachers. Teachers are available throughout the school day, after-school and at times in the evenings in order to provide meeting times and extra help. Students who are struggling academically are approached by teachers as early as the first quarter to arrange for extra help. Parents are also notified at this time and intervention strategies are developed for both school and home. If, by the third quarter, students are in danger of being retained, the teacher will reach out to parents to discuss a plan to prevent retention. The School expects all students, barring extenuating circumstances, to attend at least 90% of the school year and display an understanding of all NJCCCS for their grade and Philip's Academy Charter School grade exit requirements in order to be promoted to the following grade. Students unable to meet these criteria will be given the opportunity to attend summer classes in order to be reassessed and be promoted prior to the start of the following school year.

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.*

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

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Plan of the charter school.

Provide a draft copy of the student handbook within the appendices (Appendix C).

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.

See Academy of Excellence Charter School Student Handbook

Section III: Education Plan Concerns and Additional Questions		
No assessment strategies are provided. Further describe the instructional methods. What evidence exist that this program will be successful?	Jennifer Gnann	Instructiona
Overall goals are impressive and well stated, but the specific strategies that will accomplish goals appear to be vague and difficult to apply and measure.	Amy Ruck Kagan	Instructiona
Interested in details about local universities providing tutors. What are the details of Honors Seminars? Assessment strategy?	Jonathan Bryant	Instructiona
what do you mean by a rigorous "moral" program? How will you teach & measure a "moral" choice? What research shows this proposed approach will create your desired outcomes?	Deborah Brown	Instructiona
Please further explain: Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. What requirements will be in place for students to progress through the grades? Please provide a pacing guide for instruction outside of simply listing the standards. Please explain understanding of current federal legislation guiding education.	Jennifer Gnann	Curriculum a
Can you be more specific about the "research based" reasons? What research, conducted by whom and when? How is your proposed calendar aligned to your academic goals?	Deborah Brown	Curriculum a
What are the proposed class sizes? With looping, will the school be able to adequately backfill enrollment? With regards to the mentors, will these be other students, volunteers, or staff? What is the method to recruit, train, verify credentials as mentor?	Amy Ruck Kagan	Curriculum a
How will students be placed in their cohorts? Are students able to move from one cohort to another or are they restricted to remain in their same cohort - regardless of situation? If students must remain in their same cohort for 2-3 years, how will the school work with students who under-perform/exceed the achievement of their peers? Many details are unanswered.	Jonathan Bryant	Curriculum a
Please further ezplain the strategy of "lowering difficulty". How does this ensure success in mastering content? Explain further how enrollment will change your instructional model. How will being a dual language school benefit all students? NCLB is outdated. Please explain your current understanding of federal legislation. Why are students not assessed for the "accelerated program" until after the third grade year? How will you assess them at an appropriate time? What is involved in the "Accelerated Program"?	Jennifer Gnann	Special Prog
Adequate information was presented regarding special programs and at risk students to satisfy the application requirement. As the school continues through the process, they should consider narrowing down outreach methods.	Shaunda Cooper	Special Prog
Would like more details on the "progress tracking system." What about non-Spanish speaking ELL communities? What is the needs assessment that will be given to new students? Details on the "accelerated program" are needed.	Jonathan Bryant	Special Prog
What method will the school use to determine which students require altered instructions? What measurements will be used to gauge if intervention is being effective? What resources will the school employ to meet demand for gifted and EC students?	Amy Ruck Kagan	Special Prog
1. What will the this school do to identify outside of what ISS has done?	Jennifer Gnann	Exceptional

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Please explain the RTI or MTSS model that exists at the school.		
Explain how an IEP will be developed not only by an EC teacher.		
Explain your understanding of a 504.		
The narrative says "work with the Iredell- Statesville public school district to identify the special needs of students" - what if students come from a different county than Iredell? Different State? Do you have a protocol for requesting records? For child find, how will you let your constituents and stakeholders know about your obligation under Child Find? Good description of how files will be managed. You may want to mention that you will be compliant with FERPA.	Robert McOuat	Exceptional
Will AECS work with other districts, schools in the same way - or just Iredell- Statesville?	Jonathan Bryant	Exceptional
"within budgetary constraints" cannot be a consideration when providing IEP services. Working closely with the Exceptional Children's Department at NCDPI, will provide support for service and funding issues with IEPs.	Shaunda Cooper	Exceptional
The narrative describes "providing an inclusive education for all students." What if a child requires more intensive and more restrictive services? Would you provide the full continuum of services? For 2-4, the narrative describes instructional supports that should be available to all children? What will be special about special education? How will you provide specially designed instruction?	Robert McOuat	Exceptional
Will AECS use MTSS? "Within budgetary constraints" related to EC does not appear to be compliant with current law.	Jonathan Bryant	Exceptional
Please explain your understanding that "budget constraints" can not be a barrier to providing needed services for students with disabilities.	Jennifer Gnann	Exceptional
What model of instruction will be used for students with disabilities?		
Please explain Philip's Academy Charter sSchool grade exit requirements.	Jennifer Gnann	Student Perf
What formative assessments will be utilized?		
How will this data be used to guide instruction?		
What goals exist outside of the 4 year goal listed earlier in the application? What periodic goals exist?		
What is "NJCCCS"? Why Philip's Academy Charter School grade exit requirements? Can the plan be more specific about these requirements?	Robert McOuat	Student Perf
Need explanation on NCSAT, Philip's Academy Charter School grade exit requirements and NJCCCS - and how these relate to this category. What tool(s) will be used to assess students at the beginning of each year?	Jonathan Bryant	Student Perf
How will students be assessed "Upon becoming enrolled in the school"? What instruments will be used?	Deborah Brown	Student Perf
Are there quantitative measurements that will be used to determine eligibility for promotion? Other than 90% attendance what other measurable guides will be used to determine promotion eligibility? Will teachers be provided with guidelines and tools for communicating results with parents? Will teachers who are available after school and in evenings be compensated for additional work time and are those increases reflected in the budget?	Amy Ruck Kagan	Student Perf
This section does not appear to have been completed. Can you be more specific about Behavior and conduct requirements?	Robert McOuat	Student Cond
Do you have answers to these questions beyond a repetition of the question?	Deborah Brown	Student Cond
"Provide a draft copy of the student handbook within the appendices (Appendix C)." Does this refer to the school calendar?	Shaunda Cooper	Student Cond
not provided.	Jennifer Gnann	Student Cond
Narrative not completed in section but Appendix G, not C as listed does contain additional information.	Amy Ruck Kagan	Student Cond
It does not appear that this section was completed.	Jonathan Bryant	Student Cond

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Reviewer	Score
Alan Hawkes	
Alex Quigley	
Amy Ruck Kagan	Pass
Cheryl Turner	Fail
Kenneth Tucker	
Shaunda Cooper	Pass
Lynn Kroeger	
Jonathan Bryant	Fail
Jennifer Gnann	Fail
Steven Walker	Fail
Deborah Brown	Fail
Robert McOuat	

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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: Academy of Excellence Charter School

Mailing Address: 612 South Race Street

City/State/Zip: Statesville NC 28677

Street Address: 612 South Race Street

Phone: 704-873-9727

Fax: 704-873-9726

Name of registered agent and address: Darrell Peterson
106 Summer Breeze Ct.
Statesville NC. 28677

FEDERAL TAX ID: 46-2034590

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)
X No

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

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

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?

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Tasha Davis	Member	IREDELL	Language Arts Teacher		
Darrell Peterson	President	IREDELL	Math Teacher		
Byron Long Sr.	Vice President	IREDELL	Entrepreneur		
Wes Tinsley	Treasurer	IREDELL	Banker		
Lisa Perry	Secretary	IREDELL	EC Teacher		
Myrah Lykes	Assistant Secretary	IREDELL	Retired Teacher		
Latoya Peterson	Member	IREDELL	Human Resource		

Please provide the following in this location of the APPLICATION:

1. *A description of the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.*

The Board shall consist of not less than five (5) or more than seven (7) persons as determined by a resolution of the Board from time to time. In addition, the School Business administrator will serve, ex officio without the right to vote, the president of the School Parents Organization, and a teacher representative, ex officio and with the right to vote. The governance of the board is as follows:

The Officers-- The officers of the Board shall be the President of the Board, one Vice President as determined by the Board, a Secretary, and a Treasurer. One person may not hold more than one of these offices at any one time, except that the Secretary and the Treasurer may each hold the office of Vice Chair.

Election-- The Board shall elect all officers from among the members of the Board for terms of one year, or until their successors are elected. This election shall occur at the Annual Meeting, taking place each June.

Functions and Roles of Officers:

President of the Board-- The President of the Board shall preside over all board meetings. Subject to the control of the Board, the President shall have general supervision, direction, and control of the business and affairs of the School. The President of the Board shall have such other powers and duties as the Board, by resolution, may from time to time prescribe.

Vice President-- The Board may elect one Vice President. The Vice President shall have the powers and perform the duties of the President of the Board during the absence or inability of the President of the Board to act. Vice President shall have such other powers and duties as the Board, by resolution, may from time to time prescribe.

Secretary-- The Secretary shall create a full and complete record of the proceedings of the Board to be kept, shall keep the seal of the School and affix it to such papers and instruments as may be required in the regular

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course of business, shall cause service to be made of such notices as may be necessary or proper, shall supervise the keeping of the records of the Board, and shall have such other powers and duties as the Board, by resolution, may from time to time prescribe. The Secretary may be an employee of the School.

Treasurer-- The Treasurer shall ensure all funds and securities of the School to be safely kept, and to be deposited in the bank or banks that may be designated by the Board or otherwise invested pursuant to guidelines established by the Board, shall guarantee financial records of the Schools transactions be kept on a consistent basis, shall produce a financial report to be given for the fiscal year just completed at or before the Annual Meeting, shall render statements regarding the financial condition of the School to the Board whenever requested to do so, and shall have such other powers and duties as the Board, by resolution, may from time to time prescribe. If required by the Board, the Treasurer shall also provide a surety bond for faithful performance of his duties in such sum and with such sureties, if any, as may be required and approved by the Board. The Treasurer will be a member of the Schools business office and an ex officio member, without voting rights.

Absence of Treasurer or Secretary-- In the event of the absence or inability of either the Treasurer or Secretary to act, the Board may designate another person to act as the Treasurer or Secretary during the time of such absence or inability to act.

The board will create a job description for Lead Administrator. Recruitment strategies will include contacting other charter schools and trusted peers within the education community for candidate recommendations and advertising the position in places that cater to the charter community such as job postings websites sponsored by the NC Department of Education, The board should quarterly evaluate the performance of the administrator the first year to identify opportunities for professional growth and acknowledge areas.

- 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 job of a charter school administrator is exceptionally demanding. As an instructional and business leader, they bear more responsibility than their traditional public school counterparts, particularly when the school is new or experiencing significant growth. Overextension leads to burnout and high turnover. The board can take steps to ensure the demands on the administrator remain at a reasonable level. They should begin by creating a job description that a single person can effectively accomplish without becoming overextended. The board should also provide resources to enable the administrator to effectively delegate and develop leadership roles among the staff. When the school reaches a certain size, the board should consider hiring a vice principal.

AOECS governing board is very weighted with educational expertise. The skill sets that are very critical to educational planning and strategies are very well represented through our board of directors. With a combined experience or more than 50 years in the field of education, the board will lead the school to educational and operational success. The board will evaluate the success of the lead administrator on a quarterly basis during the first year

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of operation. The board will ensure that any areas of professional development that is lacking be afforded to the administrator to obtain optimum success. This success will involve the active representation of all key stakeholders, especially the parents.

- 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?*

Vacancies-- A vacancy in any office because of death, resignation, removal, disqualification, or otherwise shall be filled by the Board. The officer so elected shall fill the unexpired term until the next Annual Meeting.

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

Academy of Excellence board will meet monthly and quorum meeting as necessary.

- 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.*

An effective board demonstrates a strong commitment to continuous improvement by engaging in professional development and training. Training will increase the boards capacity to accomplish their responsibilities, overcome challenges, and work together. Through greater understanding of school curriculum, state standards and testing, and other programmatic operations and their impact on student achievement, the board will make better long and short-term planning decisions. Through a needs assessment, boards can determine what additional training is needed. Training is available through NC Offices of Charter Schools and NC Charter Schools Association. Our board will also receive training on Conflict Resolution, Strategic Planning, and Common Core. These are just a few identified topics that AO ECS will ensure professional development training for its Board of Directors.

The Academy of Excellence Charter School Board of Directors will attend the 2018 North Carolina Charter Schools Conference. This will give a good assessment of the areas in which we need professional development to ensure the success of our school. AO ECS will also develop board to board relationships in which we can benefit from networking with other charter school boards which can provide advice and mentoring. Through these relationships we can share special services, special events, and equipment.

- 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.*

Board members shall serve without compensation, but may be reimbursed for any necessary expenses incurred by them in performing their duties as members of the Board per procedural manual for reimbursements. Any contract with the school involving a member of the Board, or the Board members family, shall be approved by 2/3 of the Board with the interested member abstaining. Each Board member is responsible to make known to the Board any circumstances that could involve a potential conflict of interest as defined in North Carolina Charter law.

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

The Boards major roles and responsibilities will be to establish and approve

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all major educational and operational policies as they relate to the school, approving all contracts, establishing the schools annual budget, and overseeing the schools fiscal affairs. The Board will be committed to complying with the NC Open Meetings Law (G.S.143.318.9 et seq) in the conduct of their business while developing school policies. The Board intends to fulfill its obligations relative to the day-to-day management of the 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.*

Not applicable.

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

Any grievance at the school will fall into one of three primary categories:
(1) Complaints about a student, the classroom experience, or with a teacher.
(2) Complaints or concerns about a school-wide policy or administration.
(3) Complaints or concerns about a parent or community member involved with the school.

Where a grievance involves an issue arising in the classroom, parents should first seek to resolve the issue with the classroom teacher. If resolution with the teacher is not feasible or the grievance involves a school-wide policy or another parent at the school, the parent pursuing the grievance should seek to resolve the issue with the principal at the campus. The grievance should be acknowledged via written response within 10 business days. If resolution with the principal is not feasible or efforts to resolve the issue have failed, other measures may be taken.

Once all efforts to resolve a grievance have been exhausted with the school's staff and leadership, then a parent may bring a grievance to the attention of the Governing Board as follows:

Any grievances should be made in writing. This allows all parties involved to work from a consistent body of information. Generally, the Board will not address a grievance that is made anonymously, based on hearsay, or made on behalf of another family. Generally, the Board will not address a grievance where resolution has not been exhausted through the teachers and/or the principals. Generally, the Board will not address specific grievances about the performance of an individual school employee in a public meeting. Any such grievances brought at a public meeting will be taken under advisement by the Board and responded to at a later time. The Board may, at its discretion, notify individual school employees about grievances brought against them. Parents may, however, request that they not be personally identified as the party bringing the grievance. For any grievance presented to the Board, a discussion will take place in a closed session. A response via written letter will be sent within (30)thirty days of receipt of 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*

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*school (such as educational service providers, advisory bodies or parent/teacher councils).
(Appendix E)*

2. *A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).*
3. *The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix G).*
4. *A copy of the articles of incorporation from the NC Department of the Secretary of State.
(Appendix H)*

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

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

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.

1-Principal

1-Clerical Personnel

3-Core Content Teachers

2-Para Educators

2-Elective/Specialty Teachers

1-EC Teachers

.5-Food Service

.5-Substitues

.5 - Transportation

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

Recruitment for support staff for the Academy of Excellence Charter School will begin after the district has approved the charter and its enrollments are confirmed. Upon approval, teaching personnel will be recruited beginning in the Spring and continuing into the Summer of each school year. Instructional staff will be recruited with advertisements on the NC Department of Education website, as well as in well-known educational trade publications such as Education Week. We will also recruit via online job recruitment sites such as Monster.com and in local media throughout North

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Carolina. Lead administrator will also attend job fairs and set up recruiting sites for interviews.

The number and type of teachers recruited will depend on student needs from year to year. Ongoing enrollment will necessitate hiring throughout the year as necessary. Teacher candidates will be interviewed by the Lead Administrator and make hiring recommendations to the Board.

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

AOECS staff will be employed by the Board of Academy of Excellence Charter School. The Board will hire a finance officer for financial and management services, including personnel services. The Board is currently reviewing the Employment Handbook and working with legal counsel to ensure that it complies with applicable law, including without limitation, N.C. Gen. Stat. 115C-238.29A et seq. The Board expressly acknowledges that the Employment Handbook may need to be revised before it is adopted. However, the Employment Handbook is being submitted with this application as evidence that the Board is working diligently to prepare for final charter approval.

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

The Board will follow the protocol established for the screening of school employees and all vendors working in and around students, including all Board Members. AOECS will be responsible to arrange for background and fingerprinting services. This will include FBI fingerprinting and background check. As a condition for continued employment, every five years the staff of the AOECS will be required to be fingerprinted and pass a criminal background check. A comprehensive criminal history background check includes both state and

national criminal background checks and will be conducted on each applicant assigned to the Academy. The Board also asks legal questions on its employment application in relation to past felony convictions, probation, pleadings, and pending disciplinary actions. If a candidate misrepresents his/her application, the Board reserves the right to end the hiring process or employment relationship. The selection process is informed by factors identified in applied psychology, such as interview structure and the phrasing of question prompts, and it draws on effective teacher research. Interview protocol focuses on job-related questions and thus is within the legal bounds of interviewing guidelines. Every hired employee will sign an offer of employment. Staff will be hired "at will" on a year-to-year basis. Extensions of employment offers are recommended on an annual basis. All instructional personnel will be considered 10-month employees paid over a 12-month period. Instructional personnel will begin approximately three weeks prior to the start of school and work about one week after the end of school. The employee may resign from the AOECS without reason and without notice and may terminate employment without cause and without notice with the first 90

days. After the first 90 days, progressive discipline policies will be followed for minor performance situations and immediate termination for any serious violations.

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

AOECS salaries are competitive with the surrounding area schools but structured differently, with a greater emphasis on performance-based pay.

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For base salaries, pay bands have been established to a minimum, midpoint, and maximum scale by which job families can grow with merit increases. How quickly an employee moves toward the maximum is determined by the budget and the level of individual performance, based on an annual performance appraisal process. AO ECS will use a salary worksheet to calculate starting salaries in a fair and consistent manner. ACADEMY OF EXCELLENCE Employees will be offered mandated benefits as follows:

Workers Compensation

Unemployment Insurance

Social Security Insurance

Employees will also be provided benefits with various levels of coverage and premiums to meet their needs. Eligible employees (those working a minimum average of 36 hours/week) are able to participate in the benefits plan on the first of the month following 90 days of service. If benefits are not selected during this

period, enrollment changes may be made in the annual "open enrollment" sessions. Benefits available include medical, dental, vision, life insurance, supplemental life insurance, dependent life insurance, short and long term disability, 401(k) if eligible, paid leave and the Employee Assistance Program.

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

Step 1: Discussion of the problem with the immediate supervisor is encouraged. If the employee does not believe a discussion with the supervisor is appropriate, the employee should proceed directly to Step 2.

Step 2: The aggrieved employees are encouraged to request a meeting with the Board. The Board will conduct an investigation and consider the facts and may review the matter with the aggrieved employee's supervisor. All employment decisions involving the hiring or termination of teachers shall be made after investigation by the Board. Misunderstandings or conflicts can arise in any organization and should be resolved before serious problems develop. Most incidents resolve themselves without formal intervention. However, should a situation persist that the employee believes is detrimental to himself/herself, or the Board, the employee should follow the procedure described in the Employee Handbook.

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

The Lead Administrator shall be responsible for ensuring that all teachers maintain current licensure. It is also the responsibility of the Lead Administrator to seek out and schedule regular professional development.

Clerical personnel will be responsible for bookkeeping, financial operations, and administrative assistance.

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.

Academy of Excellence Charter School teachers will be experienced educators and highly qualified as defined by the No Child Left Behind Act of 2001. They will have a Bachelor's or higher degree, be North Carolina certified, and demonstrate competency in elementary and middle school education depending on their assignment. Each teacher will also demonstrate technological competency. The faculty will include regular education and special education teachers at the elementary and middle school levels. The school will employ, as needed, appropriately certified ESL or bi-lingual

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teachers for the ELL identified students.

- 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).*

In order to be hired in a teaching position at AO ECS, Regular education teachers, Special education teachers, and English as a second language teachers must have at least a bachelors degree and have completed a state-approved teacher preparation program in North Carolina. Additionally, teachers must hold a certificate for the subject or grade level they wish to teach. Teachers must have passing scores on the Praxis examination in their subject and or certification areas.

Staff Evaluation and Professional Development

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

The Lead Administrator will be responsible for ensuring that all teachers maintain current licensure. It is also the responsibility of the Lead Administrator to seek out and schedule regular professional development events for all staff.

- 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.*

MENTORING:

AO ECS will set up a mentorship program to accelerate the experience transfer from one teacher to another. We have budgeted the appropriate amount of staff development. Through mentoring, we will develop innovative teaching methods, share ideas, and build a cooperative learning and working environment. As the school grows in size and faculty, our staff will become the mentors to our new teachers. New AO ECS teachers will have one extra orientation before other teachers show up for the school year. As a team, there will be three professional development days before the start of the school year and two days of year-end evaluation days after student dismissal day. There will be mandatory professional development on all scheduled teacher workdays. Charter School conferences, workshops, exchange teaching, as well as other teacher related conferences and professional opportunities are planned to be available to teachers and academic staff throughout the school year contingent upon the teacher/school needs and available resources.

RETAINING:

Retaining good highly qualified teachers will be a priority for AO ECS. Maintaining professional consistence among our staff is crucial to the success of the school. Maintaining an open door policy is an important factor along with meeting the needs of our teachers professionally and personally (as much as we can) will assist in retention of teachers. Also, AO ECS will create a positive and exciting working environment for our teachers to foster their love of education. Lastly, we want our teachers to have a voice in the direction of the school.

EVALUATING STAFF:

AO ECS will utilize the NC Teacher Evaluation Process which evaluates teacher leadership, teacher knowledge of content, teacher facilitation to student,

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teacher established respectful environment, and teacher reflection on practice.

AOECS will support and encourage administrators, teachers, and other instructional support staff to pursue their professional development which they believe would be exciting and beneficial to their profession.

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.*

Academy of Excellence Charter School will rely heavily upon the resources and events hosted by the NC Department of Public Instruction and our local LEA for professional development. The budget reflects only additional funds for external training. The Academy's educators of core subject areas shall be certified in those subjects as defined in Section 1119 of the No Child Left Behind Act. Paraprofessionals with instructional support duties will meet guidelines of the Section 1119 of the No Child Left Behind Act and the Elementary and Secondary Education Act. It is the responsibility of the Board to ensure that educators meet the requirements prior to employment and ensure any conditional requirements are met by the educator within the time required. Non-renewable certificates and 5 year renewable requirements will be monitored for compliance. New employees participate in a mandatory New Teacher Induction (NTI). Human Resource Orientation is included in NTI and geared to familiarize new employees with the Academy, company history, vision and mission, and to review key areas of the Employee Handbook.

Some professional development will be uniform in that all staff will be required to attend. We will employ the 2011 Model Core Teaching Standards, developed by the Council of Chief State School Officers Interstate Teacher Assessment and Support Consortium (InTASC). Some topics of professional development are as follows:

1. Personalized Learning for Diverse Learners
2. Stronger Focus on Application of Knowledge and Skills
3. Improved Assessment Literacy
4. Collaborative Professional Culture

We will offer individualized professional development that is specifically targeted for specific subjects of the Common Core (i.e professional development for Mathematics). Teachers need practical but intensive learning experiences oriented toward the Common Core State Standards and new assessments

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.*

Professional Development training will be provided through the NC Charter School Association. Staff will be required by AOECS to attend all sessions. Training of team members by a Commonwealth-approved training provider, ensures the board of school directors, school administrators, parents, students, and the public that team members have received up-to date professional training consistent with standards and appropriate procedures. Guidelines for the Commonwealth Student Assistance Program training system contain training standards and competencies for SAP team professionals.

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.*

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AOECS school will operate on a 2 semester schedule which will consists of 4 9-week quarters. At the end of each quarter there is a scheduled teacher's workday. Professional development events will be planned on these teacher workdays for all staff. This will give a cumulative total of 32 hours using this method. There will also be state sponsored events that staff will attend throughout the year as well. On the days that staff will be required to be out of the classroom, AOECS will pull from its pool of substitute teachers.

In Addition AOECS will have two days of professional development prior to the school opening.

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 reflects 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)).

AOECS will use several ways of recruitment for potential students and their families. It is a recruitment model which has been used successfully by charter schools in other states to attract diverse student bodies by using variety of marketing techniques; matching the charter school Program and applicable educational and personal needs.

1. AOECS members and representatives will meet with community leaders throughout the district and state. Including those low income areas; both urban and rural to recruit students.

2. Information sessions open to all families and the general public will be held throughout the district, state, and online open to interested families and general public. Information sessions will be advertised in various print and electronic media. During these sessions, prospective patrons have the opportunity to interact with the curriculum, including lessons and materials, and have questions answered. A proposed Student Handbook will be available. Enrollment forms will be available online. The same format is followed during online sessions.

3. AOECS may participate in organized grade-appropriate awareness activities through local and state sponsored events.

4. North Carolina Virtual Academy and K12 Inc may inform students and families about enrollment opportunities and other program information through a variety of media such as radio, TV, internet, and out of home advertising (e.g. Billboards).

5. The school will establish a website and will use this as a primary mechanism to communicate with interested, prospective families.

6. AOECS will participate in radio, television, and newspaper interviews as necessary.

7. After initial enrollment is finalized, parents of students enrolled in

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AOECS will be invited to one of several parent organizations sessions that will be conducted in the district, state, or online.

8. AOECS will distribute recruiting materials about the school. mission, curriculum, leadership, and the application process to, public places such as libraries or schools.

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.*

A cornerstone of our work at AOECS is engaging families in the school. Parental involvement is a serious sharing of responsibility for each child's learning and development. We believe that parents are a child's most important teachers and understands that each child's education relies on a committed support network of adults who work together to help students achieve their potential.

All parents must commit to being involved in their child's education upon acceptance into the school. This means that parents must commit to:

- (1) One home visit with their child's teacher
- (2) Two of three teacher meetings to create learning plans
- (3) Four to six meetings/exhibitions over the course of the school.

Home visits allow teachers an inside look at the interests of their students. Through observations, informal conversation, and question- and answer sessions, the home visit provides a window on what students are excited to learn about. These visits also provide teachers an environmental context for student interests, actions, and beliefs. Iredell County hosts a diverse population of students; the home visit enables the teacher to learn where each student is coming from and understand family structure and expectations. It is an important foundation upon which we build academic, social, and organizational goals.

AOECS will hosts parents during exhibition time, when a classroom of students showcase the academic work of the quarter, present information that they have collected and analyzed and answer questions about their work posed by teachers, administrators, and their parents. We encourage parents to become involved through the Parent-Teacher Organization and support their children by being present in the school by leading a workshop or activity, assisting in classrooms or acting as a mentor to students.

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.*

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

5. *Clear policies and procedures for student withdraws and transfers.*

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

OPEN ENROLLMENT MAY 2018

APPLICATION VERIFICATIONS MAY 2018

LOTTERY NOTIFICATIONS MAY 2019

LOTTERY MAY 2019

WAIT LIST NOTICE May 2019

REGISTRATION JUNE 2019

2. Clear policies and procedures detailing open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences Prior to AO ECS opening, the open enrollment period will be established and announced. At the end of the enrollment period parents will be notified if their child has been accepted at AO ECS. If the number of applicants exceed the total allotment of program, they will be given a lottery number. If the number of the program allotment are not met, applications will be accepted on a first come basis.

In the proceeding years, applications will be accepted during the established enrollment period. AO ECS will use the lottery system to generate a number for each application. We will continue to draw applicant until all names have been drawn or until we have met the allotment of our program per grade. All other applicants will be paced on a waiting list.

3. Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers after all class assignments have been made and we have not met our allotted quota, we will approve application based upon the order in which they were received. Parents will be notified in writing of their child's acceptance into the AO ECS and will have 10 day from the date of letter to accept. If the parent declines, to accept, the space will be given to the next name on the waiting list.

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

There will be no pre-admission activities for AO ECS.

5. Clear policies and procedures for student withdraws and transfers Student have the option to withdraw from the AO ECS at any time and attend another school. AO ECS will keep verifiable records on the students who transfer or withdraw and make the necessary reports. The available slot will be offered to the next applicant on the waiting list.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No: X

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

1. *In no event may a lottery process illegally discriminate against a student on the basis of race,*

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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 Iredell-Statesville Schools
 LEA #2 Davie County Schools
 LEA #3 Alexander County Schools

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 490	LEA 300	LEA 020	LEA 490	LEA 300	LEA 020	LEA 490	LEA 300	LEA 020	LEA 490	LEA 300	LEA 020	LEA 490	LEA 300	LEA 020
Kindergarten	3	2	1	4	2	1	4	2	1	7	3	2	7	3	2
Grade 01	7	1	1	8	1	1	11	1	1	12	2	1	12	2	1
Grade 02	6	3	1	6	4	1	7	4	1	7	5	1	7	5	1
Grade 03	9	2	1	10	2	1	10	2	1	10	2	1	10	2	1
Grade 04	7	1	1	8	1	1	10	1	1	10	1	1	11	1	1
Grade 05	10	3	2	10	5	2	10	5	2	10	5	2	10	5	2
Grade 06	7	5	1	8	5	1	10	6	1	11	6	1	13	7	1
Grade 07	9	2	2	10	2	2	11	2	2	11	2	2	13	4	1
Grade 08	8	4	1	9	4	1	9	5	1	12	5	1	16	7	1
	66	23	11	73	26	11	82	28	11	90	31	12	99	36	11
	100			110			121			133			146		

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Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
N/A	Deborah Brown	Tax-Exempt S
Do you have plans to add more community members to the board?	Deborah Brown	Governance a
<p>Org chart is very simplistic. Apparent conflict of interest if the secretary can be a school employee (and can also be treasurer, per application).</p> <p>What organization coordinates the 2018 NC Charter Schools Conference and why is this identified as a method of PD for the board?</p> <p>Advisory boards, etc. - will AECS have a PTO/PTA, School Improvement Team, finance committee, etc.?</p> <p>Will the Lead Administrator only be evaluated during their first year? Application only addresses initial year re: evaluation. How will the Board evaluate their own success?</p> <p>Background check forms and questionnaires are incomplete/missing on the Board Member Information Form.</p>	Jonathan Bryant	Governance a
<p>Outside of the training offered by the state, what, if any additional training will be used to insure the board has greater understanding of school curriculum, state standards and testing and other programatic operations?</p> <p>Who will provide the needs assessment to determine if additional training is necessary?</p> <p>How will board handle the removal of a board member prior to the expiration of his/her term?</p>	Amy Ruck Kagan	Governance a
<p>Explain why the secretary may be a member of the board and an employee. This is a conflict of interest.</p> <p>Explain how the board will objectively review and manage budgets if the treasurer is an employee of the school.</p> <p>What are the term limits?</p> <p>The board will meet monthly. 12 meetings? 11? 10?</p> <p>How will the board ensure that the school is run effectively if the job description is written to be "effectively accomplished without being overextended"?</p> <p>How will a new board member be identified to fill a vacancy?</p> <p>This narrative lists "not applicable" to committees, yet a curriculum and instruction committee was listed earlier in the application. Please explain.</p> <p>Explain how the board will conduct an annual self-evaluation.</p> <p>By laws and narrative do not reflect each other.</p> <p>The governing board is very heavy with educators.</p>	Jennifer Gnann	Governance a
N/A	Deborah Brown	Proposed Man
<p>Is the Principal the same as the Lead Administrator listed earlier in the application?</p> <p>What is a para educator? How will the school attract quality candidates for special populations?</p> <p>If staff can resign without notice during the first 90 days, how will the school prepare for this type of scenario?</p> <p>How will the Board/Lead Administrator make decisions about performance based pay?</p> <p>Application does not address if proposed pay structure is comparable with local LEA - this may significantly impact ability to recruit.</p>	Jonathan Bryant	Staffing Pla
<p>Please explain the hiring requirements for gifted students.</p> <p>Explain the relationship between the employees and the board.</p>	Jennifer Gnann	Staffing Pla
What metrics will be used to determine "performance-based pay"?	Deborah Brown	Staffing Pla
<p>"All teachers maintain current licensure" - is the goal that all teachers will be licensed?</p> <p>"We want our teachers to have a voice in the direction of the school" - how will this be</p>	Jonathan Bryant	Staff Evalua

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accomplished?		
Please explain how the school will meet the personal needs of teachers. Explain how Professional development will be developed to meet the specific needs of the school, not simply what is offered through NCDPI. How many professional days will be provided prior to the start of the school (2 or 3)?	Jennifer Gnann	Staff Evalua
What PD is provided by the NC Charter School Association, and is it in keeping with current research and pedagogies?	Deborah Brown	Staff Evalua
What specific steps will be taken to create the environment that fosters love of education among teachers? How will this differ from any other school in the surrounding area? Many descriptions of teacher and staff daily requirements appear to be in addition to those performed by staff at neighboring schools; will AO ECS staff being compensated higher, and if so, does the budget reflect this?	Amy Ruck Kagan	Staff Evalua
How will you reach prospective families who may not have access to technology or be active online or in social media?	Deborah Brown	Marketing Pl
Does the school have a timeline for when the different marketing tactics will be employed relative to the start of the school year?	Amy Ruck Kagan	Marketing Pl
Is there an agreement with NC Virtual or K12 to advertise for your school? How will you ensure that applicants "reasonably reflect the racial/ethnic and demographic composition of the district"?	Jennifer Gnann	Marketing Pl
NC Virtual Academy and K12 informing about enrollment - how does this help AECS? This response does not address how the school will attempt to reflect the composition of the district.	Jonathan Bryant	Marketing Pl
How will the school enforce a home visit requirement? How will parents be involved in the programs of the school?	Jennifer Gnann	Parent and C
What, if any, steps will be taken if parents do not comply with volunteer and/or involvement commitments?	Amy Ruck Kagan	Parent and C
will your staff be compensated for the time and travel, and can you provide liability insurance if every student is to have a home visit with their teacher? Do you have a plan to accommodate families who may have work schedules that do not allow them to volunteer and participate as much as you are requiring?	Deborah Brown	Parent and C
How long will your wait list remain active?	Deborah Brown	Admissions P
A May lottery is significantly later than many other lotteries and registrations for many private schools - is there concern that this may negatively impact enrollment?	Jonathan Bryant	Admissions P
Why are enrollment activities held 18 months prior to the start of school?	Jennifer Gnann	Admissions P
Explain the rationale for starting with 9 grade levels. What happens if one grade can not be filled in the first year? Explain why you expect to lose students from ISS annually?	Jennifer Gnann	Projected St
Not sure of the origin of these numbers. It may be very challenging to open 9 grades simultaneously.	Jonathan Bryant	Projected St
How did you determine the proportion of students to admit at specific grades? Are these numbers big enough to receive enough funding to reach an economy of scale for the support staff and teaching/admin staff you'll need to run the school?	Deborah Brown	Projected St
The school will be participating the weighted lottery system.	Shaunda Cooper	Weighted Lot
N/A	Deborah Brown	Weighted Lot
Will you allow for siblings and children of staff members to receive priority in admission?		

Reviewer	Score
Alan Hawkes	
Alex Quigley	
Amy Ruck Kagan	Pass
Cheryl Turner	Fail

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Kenneth Tucker	
Deborah Brown	Fail
Steven Walker	Fail
Jennifer Gnann	Fail
Jonathan Bryant	Fail
Lynn Kroeger	
Robert McOuat	
Shaunda Cooper	Pass

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 Academy of Excellence Charter School will promote the notion of encouraging our parents to transport their students to and from school. However, in order to ensure that no child is denied access to the school due to lack of transportation; our parents and students will have optional access to transportation resources offered by the school. The Academy of Excellence will provide a bus shuttle that will pick up and drop students off in perspective designated areas of the surrounding community.

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.

To ensure that each child receives meals, AO ECS will participate in the National School Lunch Program, as our facility is located in what would be consider a low-income district of Iredell County. If for any reason we do not qualify for the National School Lunch Program, we will adjust our budget accordingly, to ensure that very student is fed.

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		\$1,188.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,056.00
Property Insurance	\$500,000		\$900.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00

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Other	\$1,000,000	\$4,954.00
Total Cost		\$10,611.00

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

Health and Safety Requirements:

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

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

academyofexcellence 09/11/2017

(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.

The Board of Directors of AO ECS has discussed and affirmed its intentions to. Hold a new educational structure on the property located at 612 S Race Street, Statesville, NC. The edifice will be a two story structure that will house our lower school (K-5) on the first floor and our upper school (6-8) on the second floor. The building will include a full operational cafeteria as well as computer lab. Male and female restrooms will be located on each floor and a tea he's lounge on the second floor. After the building is completed, AO ECS will seek out the local school inspection office for Certificate of Occupancy.

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.

Not Applicable

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.*

In the event the building will not be ready, at the time of public notice of school opening, AO ECS will hire a realtor to assist us in obtaining a temporary site to house our school.

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Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
what if families have no personal transportation to get to the designated area? How long will the ride be for a bus shuttle?	Deborah Brown	Transportati
Explain how students with IEPs that include transportation will be provided with that transportation. Explain why bus transportation line item is included only every other year.	Jennifer Gnann	Transportati
Need more detail in this section, how many shuttles will be provided, how are stops determined, etc.?	Jonathan Bryant	Transportati
How/where will food be prepared & delivered?	Deborah Brown	School Lunch
How will lunches be provided?	Jennifer Gnann	School Lunch
Why is no budget given to child nutrition?		
In the event of not qualifying for NSLP, what type of nominal impact will this have on the budget and can the school afford such a change?	Amy Ruck Kagan	School Lunch
Unclear how the applicant's response will "ensure that every child is fed."	Jonathan Bryant	School Lunch
The insurance line item on the budget does not align with the narrative.	Jennifer Gnann	Civil Liabil
Quote was available (appendix L). However, I did not see the cost represented in either of the budgets provided.	Shaunda Cooper	Civil Liabil
Where is the Board Chair signature?	Deborah Brown	Healthy and
Can you provide details on how will the new facility be funded?	Shaunda Cooper	Facility and
Why is there no proposed spending for a "new educational structure"?	Jennifer Gnann	Facility and
What contingency locations exist currently?		
What other contingency sites have you explored, and what is the market like in your proposed area? Does the typo in the phrase "has discussed and affirmed its intentions to. Hold a new educational structure" mean that you are building new? Or are you retrofitting an existing structure? Can you provide mroe details?	Deborah Brown	Facility and
Is AECS in possession of this site or in negotiations to secure this site?	Jonathan Bryant	Facility and
What are the costs associated with the facility? If no costs are associated, what arrangements have been made? Have any relationships been disclosed and are there any real or apparent conflicts of interest?	Amy Ruck Kagan	Facility and

Reviewer	Score
Alan Hawkes	
Alex Quigley	
Shaunda Cooper	Fail
Robert McOuat	
Lynn Kroeger	
Jonathan Bryant	Fail
Jennifer Gnann	Fail
Steven Walker	Fail
Deborah Brown	Fail
Kenneth Tucker	
Cheryl Turner	Fail
Amy Ruck Kagan	Fail

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

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>Refer to the Resource Manual Finance Section for guidance on estimated funding amounts</i></p>	<p>State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.</p> <ul style="list-style-type: none"> In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located. <p>Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p>Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</p>			
	<p>LEA #1 490 - Iredell-Statesville Schools</p>			
	Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
	State Funds	\$5,025.58	66	\$331,688.28
	Local Funds	\$1,547.00	66	\$102,102.00
	Federal EC Funds	\$4,253.55	10	\$42,535.50
	Totals			\$476,325.78
	<p>LEA #2 300 - Davie County Schools</p>			
	Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
	State Funds	\$5,243.31	23	\$120,596.13
Local Funds	\$1,703.00	23	\$39,169.00	
Federal EC Funds	\$3,762.03	4	\$15,048.12	
Totals			\$174,813.25	
<p>LEA #3 020 - Alexander County Schools</p>				
Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019	
State Funds	\$5,658.97	11	\$62,248.67	
Local Funds	\$1,259.32	11	\$13,852.52	
Federal EC Funds	\$3,957.82	3	\$11,873.46	
Totals			\$87,974.65	

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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	\$514,533	\$565,986	\$622,584	\$684,842	\$748,758
-Local Per Pupil Funds	\$155,124	\$170,636	\$187,699	\$206,468	\$228,470
-Exceptional Children Federal Funds	\$69,457	\$76,402	\$84,042	\$92,446	\$101,690
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$739,114	\$813,024	\$894,325	\$983,756	\$1,078,918

***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.

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

The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan.

BUDGET EXPENDITURE PROJECTIONS Personnel	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary									
Administrative & Support Personnel:															
Lead Administrator	1	\$65,000	\$65,000	1	\$65,650	\$65,650	1	\$66,306	\$66,306	1	\$66,969	\$66,969	1	\$67,638	\$67,638
Assistant Administrator	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$47,000	\$47,000
Finance Officer	0	\$0	\$0	0	\$0	\$0	.5	\$30,000	\$15,000	.5	\$30,300	\$15,150	.5	\$30,603	\$15,302
Clerical	1	\$30,000	\$30,000	1	\$30,000	\$30,000	1	\$30,300	\$30,300	1	\$30,300	\$30,300	1	\$30,603	\$30,603
Food Service Staff	.5	\$15,000	\$7,500	.5	\$15,000	\$7,500	.5	\$15,150	\$7,575	.5	\$15,302	\$7,651	.5	\$15,455	\$7,728
Custodians	.5	\$10,000	\$5,000	.5	\$10,000	\$5,000	.5	\$10,100	\$5,050	.5	\$10,201	\$5,101	0	\$10,303	\$0
Transportation Staff	.5	\$15,000	\$7,500	.5	\$15,000	\$7,500	.5	\$15,150	\$7,575	.5	\$15,302	\$7,651	0	\$15,455	\$0
A - Total Admin and Support:	3.5		\$115,000	3.5		\$115,650	4		\$131,806	4		\$132,822	4		\$168,270
Instructional Personnel:															
Core Content Teacher(s)	3	\$40,000	\$120,000	3	\$40,000	\$120,000	4	\$40,400	\$161,600	4	\$40,804	\$163,216	5	\$41,212	\$206,060
Electives/Specialty Teacher(s)	2	\$35,000	\$70,000	2	\$35,000	\$70,000	3	\$35,350	\$106,050	3	\$35,704	\$107,112	3	\$36,061	\$108,183
Exceptional Children Teacher(s)	1	\$40,000	\$40,000	1	\$40,000	\$40,000	2	\$40,400	\$80,800	2	\$40,804	\$81,608	2	\$41,212	\$82,424
Instructional Support	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Teacher Assistants	2	\$20,000	\$40,000	2	\$20,000	\$40,000	2	\$20,200	\$40,400	2	\$20,402	\$40,804	2	\$20,602	\$41,204
B - Total Instructional	8		\$270,000	8		\$270,000	11		\$388,850	11		\$392,740	12		\$437,871

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	11.5		\$385,000	11.5		\$385,650	15		\$520,656	15		\$525,562	16		\$606,141
Administrative & Support Benefits															
Health Insurance	2	\$22	\$44	2	\$22	\$44	2	\$22	\$44	2	\$22	\$44	5	\$22	\$110
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Life Insurance	2	\$180	\$360	2	\$180	\$360	2	\$180	\$360	2	\$180	\$360	5	\$180	\$900
Disability	2	\$26	\$52	2	\$26	\$52	2	\$26	\$52	2	\$26	\$52	5	\$26	\$130
Medicare	2	\$463	\$926	2	\$463	\$926	2	\$460	\$920	2	\$460	\$920	5	\$459	\$2,295
Social Security	2	\$1,979	\$3,958	2	\$1,979	\$3,958	2	\$1,965	\$3,930	2	\$1,965	\$3,930	5	\$1,961	\$9,805
D - Total Admin and Support Benefits:	10		\$5,340	10		\$5,340	10		\$5,306	10		\$5,306	25		\$13,240
Instructional Personnel Benefits:															
Health Insurance	8	\$22	\$176	8	\$22	\$176	11	\$22	\$242	11	\$23	\$253	10	\$24	\$240
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	10	\$0	\$0
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Social Security	8	\$2,469	\$19,752	8	\$2,469	\$19,752	11	\$2,481	\$27,291	11	\$2,481	\$27,291	10	\$2,515	\$25,150
Disability	8	\$26	\$208	8	\$26	\$208	11	\$26	\$286	11	\$26	\$286	10	\$26	\$260
Medicare	8	\$577	\$4,616	8	\$577	\$4,616	11	\$580	\$6,380	11	\$580	\$6,380	10	\$588	\$5,880
Life Insurance	8	\$180	\$1,440	8	\$180	\$1,440	11	\$180	\$1,980	11	\$180	\$1,980	10	\$180	\$1,800
E - Total Instructional Personnel Benefits:	40		\$26,192	40		\$26,192	55		\$36,179	55		\$36,190	60		\$33,330
D+E = F - Total Personnel Benefits	50		\$31,532	50		\$31,532	65		\$41,485	65		\$41,496	85		\$46,570
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	13.5		\$120,340	13.5		\$120,990	14		\$137,112	14		\$138,128	29		\$181,510

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B+E = H - Total Instructional Personnel (Salary & Benefits)	48		\$296,192	48		\$296,192	66		\$425,029	66		\$428,930	72		\$471,201
G+H = J - TOTAL PERSONNEL	61.5		\$416,532	61.5		\$417,182	80		\$562,141	80		\$567,058	101		\$652,711

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

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Office:	Office Supplies	\$2,400	\$2,520	\$2,646	\$2,778	\$2,917
	Paper	\$600	\$630	\$662	\$695	\$730
	Computers & Software	\$5,000	\$5,250	\$5,512	\$5,788	\$6,077
	Communications & Telephone	\$4,800	\$5,040	\$5,292	\$5,557	\$5,835
	Copier leases	\$6,000	\$6,300	\$6,615	\$6,946	\$7,293
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$2,400	\$2,520	\$2,646	\$2,778	\$3,056
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$0	\$0	\$0	\$0	\$0
	Other Professional	\$0	\$0	\$0	\$0	\$0
Facilities	Facility Lease/Mortgage	\$34,400	\$34,400	\$34,400	\$34,400	\$34,400
	Maintenance	\$1,500	\$1,575	\$1,654	\$1,737	\$1,824
	Custodial Supplies	\$5,000	\$5,250	\$5,512	\$5,788	\$6,077
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$18,079	\$18,079	\$18,079	\$18,079	\$18,079
	Other	\$0	\$0	\$0	\$0	\$0
Utilities	Electric	\$6,000	\$6,300	\$6,615	\$6,946	\$7,293
	Gas	\$3,500	\$3,675	\$3,859	\$4,052	\$4,254
	Water/Sewer	\$0	\$0	\$0	\$0	\$0
	Trash	\$500	\$750	\$788	\$827	\$868
Transportation	Buses	\$40,000	\$0	\$40,000	\$0	\$40,000
	Gas	\$3,600	\$3,600	\$3,600	\$3,600	\$3,600
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$1,500	\$1,575	\$1,654	\$1,737	\$1,824
	Child nutrition	\$0	\$0	\$0	\$0	\$0
	Travel	\$0	\$0	\$0	\$0	\$0
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$135,279	\$97,464	\$139,534	\$101,708	\$144,127
	Instructional:					
Instructional Contract	Staff Development	\$500	\$750	\$788	\$827	\$868
Classroom Technology	Software	\$1,000	\$1,050	\$1,103	\$1,158	\$1,215

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Books and Supplies	Instructional Materials	\$2,000	\$2,100	\$2,206	\$2,316	\$2,430
	Curriculum/Texts	\$1,000	\$1,050	\$1,103	\$1,158	\$1,215
	Copy Paper	\$1,200	\$1,260	\$1,323	\$1,389	\$1,458
	Testing Supplies	\$1,000	\$1,050	\$1,103	\$1,158	\$1,215
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$6,700	\$7,260	\$7,626	\$8,006	\$8,401
	K+L = M - TOTAL OPERATIONS	\$141,979	\$104,724	\$147,160	\$109,714	\$152,528

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$416,532	\$417,182	\$562,141	\$567,058	\$652,711
M - TOTAL OPERATIONS	\$141,979	\$104,724	\$147,160	\$109,714	\$152,528
J+ M =N TOTAL EXPENDITURES	\$558,511	\$521,906	\$709,301	\$676,772	\$805,239
Z - TOTAL REVENUE	\$739,114	\$813,024	\$894,325	\$983,756	\$1,078,918
Z - N = SURPLUS / (DEFICIT)	\$180,603	\$291,118	\$185,024	\$306,985	\$273,679

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.

AOECS chose a number that was less than one percent of the ADM. Based upon the immediate area and surrounding areas we surmised that a 10% increase will occur within the second year of operation and will not increase until the fourth year by an additional 10%.

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

The contingency plan is to seek out bankers, pull on the resources of our stakeholder, school fundraisers, also apply for grants.

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

There are no other sources of funding AOECS will rely upon. Our charter is based solely upon county, state, and, and federal funds.

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

The teacher to student ratio will be 1:15

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.*

No. All of these services will be provided by personnel stated in the Personnel Budget.

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

The budget aligns with the AOECS mission in that it supports the number of students and the necessary staff, supplies, and operational team to ensure that we can accommodate our students properly.

4. *What percentage of expenditures will be the school's goal for a general fund balance?*

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Describe how the school will develop the fund balance.

AOECS will strive to use 95% of its general budget. AOEC will develop the fund balance by using lesser quantity of supplies, operational expenditures, and we will negotiate on the contract cost of the new facility.

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

The proposed financing structure will be from the solicited funding from local, state, and federal monies for our facility. Other sources will hopefully be from fundraising and grants. We have an immediate desire to apply for incorporation with a 501c3 status upon approval of our charter.

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

NO. The only potential asset that AOECS will have, is the land upon which the facility will be constructed once the application has been approved.

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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?

AOECS finances will be audited annually by an independent auditor retained by the school. The school shall adhere to the auditing and reporting procedures and requirements that are applied to all public schools operating in North Carolina. Auditing and reporting requirements shall be in compliance with the principle set forth in the Single Audit Guide, Financial Accounting Handbook, and the Funding Manual which is published annually by the Office of Auditing and Field Services.

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

NOT APPLICABLE

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.

Acadia Northstar, LLC
P.O. Box 110
Rutherford, NC 28139

www.acadianorthstar.com

email: anscharter.com

Phone: (828) 287-7897
Fax (828) 287-9800

Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
How will the school function without a paid finance officer during the first few years of operation? How will AECS attract administration if no retirement is offered/funded? Benefit numbers (health insurance, disability, etc.) seem very low.	Jonathan Bryant	Personnel Bu
are your proposed salaries in line with the local LEA so you can attract and retain quality personnel?	Deborah Brown	Personnel Bu
Bus driver is listed...however not included in transportation narrative. How is it possible to have 3 teachers but 9 grade levels in year 1? Budget does not reflect the projected student enrollment.	Jennifer Gnann	Personnel Bu
Does your classroom technology budget include devices? If so, do you consider the amount projected to be sufficient?	Shaunda Cooper	Operations B
How will \$500 cover the cost of professional development for an entire staff for an entire school year? How will an entire school be outfitted with only \$2000?	Jennifer Gnann	Operations B
No financial contract or finance officer budgeted for the first few years is very concerning - how will finances be monitored/accomplished? Lease/mortgage is not projected to rise in 5 years? Is water expense part of the lease? If \$40,000 is for purchasing busses, how will AECS maintain these without any budgeted monies? Is there any budget for computers/classroom technology for teachers?	Jonathan Bryant	Operations B
Items listed in the budget do not accurately reflect what is written in the narrative. Therefore, projections do not reflect the application.	Jennifer Gnann	Total Expend
Is there not sufficient flexibility in staffing that if enrollment targets are not met, the school would be required to take on additional debt, grants or loans as a first step? School mentions that it will own the land the school facility is to be built on, what financial arrangements, and /or conversations have taken place with a lender to enable school to purchase said land?	Amy Ruck Kagan	Budget Narra
Why will students choose this school? What is the break-even number? What will happen at the school level if the enrollment is not what is expected? How will the budget support the building of a new school if no outside money is available and the school is "based solely upon county, state, and federal funds"? How will a fund balance be built if 95% of the budget is consistently spent? How will emergencies be planned for?	Jennifer Gnann	Budget Narra
What sources do you have for trying to "seek out bankers, pull on the resources of our stakeholder, school fundraisers, also apply for grants."	Deborah Brown	Budget Narra
The applicant has provided a realistic plan regarding the projected sources of revenue and projected expenses that ensure the financial viability of the public charter school. The only follow up question is regarding plans for classroom technology.	Shaunda Cooper	Budget Narra
Financial contingency plan is inadequate and lacks sufficient detail. What is the break-even point for student enrollment?	Jonathan Bryant	Budget Narra
Acadia Northstar is listed here, but not included in the budget. How will bids from other companies be acquired?	Jennifer Gnann	Financial Au
Does the school have an auditor identified?	Amy Ruck Kagan	Financial Au

Reviewer	Score
Alan Hawkes	

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Robert McQuat	
Lynn Kroeger	
Jonathan Bryant	Fail
Jennifer Gnann	Fail
Shaunda Cooper	Pass
Deborah Brown	Pass
Kenneth Tucker	
Cheryl Turner	Fail
Amy Ruck Kagan	Fail
Alex Quigley	
Steven Walker	Fail

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).

academyofexcellence

Date: 09/22/2017

Applicant Signature:

The foregoing application is submitted on behalf of Academy of Excellence Charter School (*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: academyofexcellence

Board Position: Mr. Darrell Peterson

Signature: _____

Date: 09/22/2017

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

Notary Public

Official Seal

Academy of Excellence Charter School - The Academy of Excellence Charter School's mission is to provide a quality academic experience with the collaboration of parents, teachers, and the community that cultivates 21st Century learners for global success.

My commission expires: _____, 20_____.

OVERALL ASSESSMENT

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

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

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

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

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

<u>CSAB Votes</u>	
No	Yes

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

Initial Screening

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

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> What research supports your statements that smaller class sizes will result in academic success? How will you measure "excellence"? What do you mean by, "very positive impact on our local LEA by streaming students who may not be performing to their grade level"? - deborahbrownnc</p> <p><u>Educational Need and Targeted Student Population</u> Please explain why the enrollment chart does not match the narrative provided here. Further explain how the proposed school will differ from the LEA. A list of characterizations of students does not do that. The data shown in A1 shows that the students of the district are performing at or above state average. - jengnann</p> <p><u>Educational Need and Targeted Student Population</u> Stating that 87% of respondents are interested in learning about AECS is somewhat misleading - 22% of these responded "slightly interested." Academic justification for need is that there is potential for higher scores, but data included in appendix A indicates that students in Iredell Co are performing similar to other students in the state. The spelling and overall writing of this application is confusing - it also appears to contain conflicting information. Is there research that shows smaller class sizes or NCLB are guides that increase achievement? - jonathanbryant</p> <p><u>Educational Need and Targeted Student Population</u> Which specific curriculums will be used to obtain the described learning environment that the target market requires? While observations regarding the learning tendencies of 21st century youth, and how that differs from previous generations, how these tendencies will be taught differently from</p>
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	<p>existing schools is unclear. - arkagan</p> <p><u>Educational Need and Targeted Student Population</u> How is what you are proposing different from the local LEAs? - deborahbrownnc</p> <p><u>Purposes of Proposed Charter School</u> Can you provide more information on how the school will utilize partnerships with area universities? - shaundacooper2</p> <p><u>Purposes of Proposed Charter School</u> To which Legislative Purpose is the school aligned? - jengnann</p> <p><u>Purposes of Proposed Charter School</u> Would like to see more quantitative and measurable tools that demonstrate how goals will be accomplished. - arkagan</p> <p><u>Purposes of Proposed Charter School</u> What is the research you have used as a basis for your model? Which of the 6 legislative purposes are you targeting? - deborahbrownnc</p> <p><u>Goals for the Proposed Charter School</u> The academic goals seem unrealistic based on baseline data provided in A1.</p> <p>How will the governing board know if the school is successful? Having a report provided doesn't show success. - jengnann</p> <p><u>Goals for the Proposed Charter School</u> How will many of these goals be measured (maintain a friendly atmosphere....constant budget monitoring...maintain a high level of parent engagement...etc.)? what does "fully functioning board" mean? What is intended by partner with at least 5 business/community organizations - is this describing a vendor relationship, a service partnership, etc.? - jonathanbryant</p> <p><u>Goals for the Proposed Charter School</u> What percentage of the staff does the school propose will be board certified? Does the school have a nominal target for surplus funds? - arkagan</p> <p><u>Goals for the Proposed Charter School</u> How do you know that 90% on grade level is a reasonable and attainable goal for your targeted population? - deborahbrownnc</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> No assessment strategies are provided.</p> <p>Further describe the instructional methods.</p> <p>What evidence exist that this program will be successful? - jengnann</p> <p><u>Instructional Program</u> Interested in details about local universities providing tutors. What are the details of Honors Seminars? Assessment strategy? - jonathanbryant</p> <p><u>Instructional Program</u> Overall goals are impressive and well stated, but the specific strategies that will</p>

	<p>accomplish goals appear to be vague and difficult to apply and measure. - arkagan</p> <p><u>Instructional Program</u> what do you mean by a rigorous "moral" program? How will you teach & measure a "moral" choice? What research shows this proposed approach will create your desired outcomes? - deborahbrownnc</p> <p><u>Curriculum and Instructional Design</u> Please further explain: Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. What requirements will be in place for students to progress through the grades? Please provide a pacing guide for instruction outside of simply listing the standards. Please explain understanding of current federal legislation guiding education. - jengnann</p> <p><u>Curriculum and Instructional Design</u> How will students be placed in their cohorts? Are students able to move from one cohort to another or are they restricted to remain in their same cohort - regardless of situation? If students must remain in their same cohort for 2-3 years, how will the school work with students who under-perform/exceed the achievement of their peers? Many details are unanswered. - jonathanbryant</p> <p><u>Curriculum and Instructional Design</u> What are the proposed class sizes? With looping, will the school be able to adequately backfill enrollment? With regards to the mentors, will these be other students, volunteers, or staff? What is the method to recruit, train, verify credentials as mentor? - arkagan</p> <p><u>Curriculum and Instructional Design</u> Can you be more specific about the "research based" reasons? What research, conducted by whom and when? How is your proposed calendar aligned to your academic goals? - deborahbrownnc</p> <p><u>Special Programs and "At-Risk" Students</u> Adequate information was presented regarding special programs and at risk students to satisfy the application requirement. As the school continues through the process, they should consider narrowing down outreach methods. - shaundacooper2</p> <p><u>Special Programs and "At-Risk" Students</u> Please further explain the strategy of "lowering difficulty". How does this ensure success in mastering content? Explain further how enrollment will change your instructional model. How will being a dual language school benefit all students? NCLB is outdated. Please explain your current understanding of federal legislation. Why are students not assessed for the "accelerated program" until after the third grade year? How will you assess them at an appropriate time?</p>
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	<p>What is involved in the "Accelerated Program"? - jengnann</p> <p><u>Special Programs and "At-Risk" Students</u> Would like more details on the "progress tracking system." What about non-Spanish speaking ELL communities? What is the needs assessment that will be given to new students? Details on the "accelerated program" are needed. - jonathanbryant</p> <p><u>Special Programs and "At-Risk" Students</u> What method will the school use to determine which students require altered instructions? What measurements will be used to gauge if intervention is being effective? What resources will the school employ to meet demand for gifted and EC students? - arkagan</p> <p><u>Exceptional Children – Identification and Records</u> The narrative says "work with the Iredell- Statesville public school district to identify the special needs of students" - what if students come from a different county than Iredell? Different State? Do you have a protocol for requesting records? For child find, how will you let your constituents and stakeholders know about your obligation under Child Find? Good description of how files will be managed. You may want to mention that you will be compliant with FERPA. - robert_mcouat1</p> <p><u>Exceptional Children – Identification and Records</u> 1. What will the this school do to identify outside of what ISS has done? Please explain the RTI or MTSS model that exists at the school. Explain how an IEP will be developed not only by an EC teacher. Explain your understanding of a 504. - jengnann</p> <p><u>Exceptional Children – Identification and Records</u> Will AECS work with other districts, schools in the same way - or just Iredell-Statesville? - jonathanbryant</p> <p><u>Exceptional Children – Education Programming</u> The narrative describes "providing an inclusive education for all students." What if a child requires more intensive and more restrictive services? Would you provide the full continuum of services? For 2-4, the narrative describes instructional supports that should be available to all children? What will be special about special education? How will you provide specially designed instruction? - robert_mcouat1</p> <p><u>Exceptional Children – Education Programming</u> "within budgetary constraints" cannot be a consideration when providing IEP services. Working closely with the Exceptional Children's Department at NCDPI, will provide support for service and funding issues with IEPs. - shaundacooper2</p> <p><u>Exceptional Children – Education Programming</u> Please explain your understanding that "budget constraints" can not be a barrier to providing needed services for students with disabilities. What model of instruction will be used for students with disabilities? - jengnann</p> <p><u>Exceptional Children – Education Programming</u></p>
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	<p>Will AECS use MTSS? "Within budgetary constraints" related to EC does not appear to be compliant with current law. - jonathanbryant</p> <p><u>Student Performance Standards</u> What is "NJCCCS"? Why Philip's Academy Charter School grade exit requirements? Can the plan be more specific about these requirements? - robert_mcouat1</p> <p><u>Student Performance Standards</u> Please explain Philip's Academy Charter sSchool grade exit requirements.</p> <p>What formative assessments will be utilized?</p> <p>How will this data be used to guide instruction?</p> <p>What goals exist outside of the 4 year goal listed earlier in the application? What periodic goals exist? - jengnann</p> <p><u>Student Performance Standards</u> Are there quantitative measurements that will be used to determine eligibility for promotion? Other than 90% attendance what other measurable guides will be used to determine promotion eligibility? Will teachers be provided with guidelines and tools for communicating results with parents? Will teachers who are available after school and in evenings be compensated for additional work time and are those increases reflected in the budget? - arkagan</p> <p><u>Student Performance Standards</u> Need explanation on NCSAT, Philip's Academy Charter School grade exit requirements and NJCCCS - and how these relate to this category. What tool(s) will be used to assess students at the beginning of each year? - jonathanbryant</p> <p><u>Student Performance Standards</u> How will students be assessed "Upon becoming enrolled in the school"? What instruments will be used? - deborahbrownnc</p> <p><u>Student Conduct and Discipline</u> This section does not appear to have been completed. Can you be more specific about Behavior and conduct requirements? - robert_mcouat1</p> <p><u>Student Conduct and Discipline</u> "Provide a draft copy of the student handbook within the appendices (Appendix C)." Does this refer to the school calendar? - shaundacooper2</p> <p><u>Student Conduct and Discipline</u> not provided. - jengnann</p> <p><u>Student Conduct and Discipline</u> Narrative not completed in section but Appendix G, not C as listed does contain additional information. - arkagan</p> <p><u>Student Conduct and Discipline</u> It does not appear that this section was completed. - jonathanbryant</p> <p><u>Student Conduct and Discipline</u></p>
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<p>Governance and Capacity</p>	<p>Do you have answers to these questions beyond a repetition of the question? - deborahbrownnc</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> N/A - deborahbrownnc</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Explain why the secretary may be a member of the board and an employee. This is a conflict of interest.</p> <p>Explain how the board will objectively review and manage budgets if the treasurer is an employee of the school.</p> <p>What are the term limits?</p> <p>The board will meet monthly. 12 meetings? 11? 10?</p> <p>How will the board ensure that the school is run effectively if the job description is written to be "effectively accomplished without being overextended"?</p> <p>How will a new board member be identified to fill a vacancy?</p> <p>This narrative lists "not applicable" to committees, yet a curriculum and instruction committee was listed earlier in the application. Please explain.</p> <p>Explain how the board will conduct an annual self-evaluation.</p> <p>By laws and narrative do not reflect each other.</p> <p>The governing board is very heavy with educators. - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Outside of the training offered by the state, what, if any additional training will be used to insure the board has greater understanding of school curriculum, state standards and testing and other programatic operations? Who will provide the needs assessment to determine if additional training is necessary? How will board handle the removal of a board member prior to the expiration of his/her term? - arkagan</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Org chart is very simplistic. Apparent conflict of interest if the secretary can be a school employee (and can also be treasurer, per application). What organization coordinates the 2018 NC Charter Schools Conference and why is this identified as a method of PD for the board? Advisory boards, etc. - will AECS have a PTO/PTA, School Improvement Team, finance committee, etc.? Will the Lead Administrator only be evaluated during their first year? Application only addresses initial year re: evaluation. How will the Board evaluate their own success? Background check forms and questionnaires are incomplete/missing on the Board Member Information Form. - jonathanbryant</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p>
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	<p>Do you have plans to add more community members to the board? - deborahbrownnc</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - deborahbrownnc</p> <p><u>Staffing Plans, Hiring, and Management</u> Please explain the hiring requirements for gifted students.</p> <p>Explain the relationship between the employees and the board. - jengnann</p> <p><u>Staffing Plans, Hiring, and Management</u> Is the Principal the same as the Lead Administrator listed earlier in the application? What is a para educator? How will the school attract quality candidates for special populations? If staff can resign without notice during the first 90 days, how will the school prepare for this type of scenario? How will the Board/Lead Administrator make decisions about performance based pay? Application does not address if proposed pay structure is comparable with local LEA - this may significantly impact ability to recruit. - jonathanbryant</p> <p><u>Staffing Plans, Hiring, and Management</u> What metrics will be used to determine "performance-based pay"? - deborahbrownnc</p> <p><u>Staff Evaluation and Professional Development</u> Please explain how the school will meet the personal needs of teachers.</p> <p>Explain how Professional development will be developed to meet the specific needs of the school, not simply what is offered through NCDPI.</p> <p>How many professional days will be provided prior to the start of the school (2 or 3)? - jengnann</p> <p><u>Staff Evaluation and Professional Development</u> What specific steps will be taken to create the environment that fosters love of education among teachers? How will this differ from any other school in the surrounding area? Many descriptions of teacher and staff daily requirements appear to be in addition to those performed by staff at neighboring schools; will AO ECS staff being compensated higher, and if so, does the budget reflect this? - arkagan</p> <p><u>Staff Evaluation and Professional Development</u> "All teachers maintain current licensure" - is the goal that all teachers will be licensed? "We want our teachers to have a voice in the direction of the school" - how will this be accomplished? - jonathanbryant</p> <p><u>Staff Evaluation and Professional Development</u> What PD is provided by the NC Charter School Association, and is it in keeping with current research and pedagogies? - deborahbrownnc</p> <p><u>Marketing Plan</u> Is there an agreement with NC Virtual or K12 to advertise for your school?</p> <p>How will you ensure that applicants "reasonably reflect the racial/ethnic and demographic composition of the district"? - jengnann</p> <p><u>Marketing Plan</u></p>
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	<p>Does the school have a timeline for when the different marketing tactics will be employed relative to the start of the school year? - arkagan</p> <p><u>Marketing Plan</u> NC Virtual Academy and K12 informing about enrollment - how does this help AECS? This response does not address how the school will attempt to reflect the composition of the district. - jonathanbryant</p> <p><u>Marketing Plan</u> How will you reach prospective families who may not have access to technology or be active online or in social media? - deborahbrownnc</p> <p><u>Parent and Community Involvement</u> How will the school enforce a home visit requirement?</p> <p>How will parents be involved in the programs of the school? - jengnann</p> <p><u>Parent and Community Involvement</u> What, if any, steps will be taken if parents do not comply with volunteer and/or involvement commitments? - arkagan</p> <p><u>Parent and Community Involvement</u> will your staff be compensated for the time and travel, and can you provide liability insurance if every student is to have a home visit with their teacher? Do you have a plan to accommodate families who may have work schedules that do not allow them to volunteer and participate as much as you are requiring? - deborahbrownnc</p> <p><u>Admissions Policy</u> Why are enrollment activities held 18 months prior to the start of school? - jengnann</p> <p><u>Admissions Policy</u> A May lottery is significantly later than many other lotteries and registrations for many private schools - is there concern that this may negatively impact enrollment? - jonathanbryant</p> <p><u>Admissions Policy</u> How long will your wait list remain active? - deborahbrownnc</p> <p><u>Projected Student Enrollment (Table)</u> Explain the rationale for starting with 9 grade levels. What happens if one grade can not be filled in the first year? Explain why you expect to lose students from ISS annually? - jengnann</p> <p><u>Projected Student Enrollment (Table)</u> Not sure of the origin of these numbers. It may be very challenging to open 9 grades simultaneously. - jonathanbryant</p> <p><u>Projected Student Enrollment (Table)</u> How did you determine the proportion of students to admit at specific grades?</p> <p>Are these numbers big enough to receive enough funding to reach an economy of scale for the support staff and teaching/admin staff you'll need to run the school? - deborahbrownnc</p> <p><u>Weighted Lottery</u> The school will be participating the weighted lottery system. - shaundacooper2</p>
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	<p><u>Weighted Lottery</u> N/A</p> <p>Will you allow for siblings and children of staff members to receive priority in admission? - deborahbrownnc</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Explain how students with IEPs that include transportation will be provided with that transportation.</p> <p>Explain why bus transportation line item is included only every other year. - jengnann</p> <p><u>Transportation Plan</u> Need more detail in this section, how many shuttles will be provided, how are stops determined, etc.? - jonathanbryant</p> <p><u>Transportation Plan</u> what if families have no personal transportation to get to the designated area? How long will the ride be for a bus shuttle? - deborahbrownnc</p> <p><u>School Lunch Plan</u> How will lunches be provided?</p> <p>Why is no budget given to child nutrition? - jengnann</p> <p><u>School Lunch Plan</u> In the event of not qualifying for NSLP, what type of nominal impact will this have on the budget and can the school afford such a change? - arkagan</p> <p><u>School Lunch Plan</u> Unclear how the applicant's response will "ensure that every child is fed." - jonathanbryant</p> <p><u>School Lunch Plan</u> How/where will food be prepared & delivered? - deborahbrownnc</p> <p><u>Civil Liability and Insurance</u> Quote was available (appendix L). However, I did not see the cost represented in either of the budgets provided. - shaundacooper2</p> <p><u>Civil Liability and Insurance</u> The insurance line item on the budget does not align with the narrative. - jengnann</p> <p><u>Healthy and Safety Requirements</u> Where is the Board Chair signature? - deborahbrownnc</p> <p><u>Facility and Facility Contingency Plan</u> Can you provide details on how will the new facility be funded? - shaundacooper2</p> <p><u>Facility and Facility Contingency Plan</u> Why is there no proposed spending for a "new educational structure"?</p> <p>What contingency locations exist currently? - jengnann</p> <p><u>Facility and Facility Contingency Plan</u> What are the costs associated with the facility?</p>

	<p>If no costs are associated, what arrangements have been made? Have any relationships been disclosed and are there any real or apparent conflicts of interest? - arkagan</p> <p><u>Facility and Facility Contingency Plan</u> Is AECS in possession of this site or in negotiations to secure this site? - jonathanbryant</p> <p><u>Facility and Facility Contingency Plan</u> What other contingency sites have you explored, and what is the market like in your proposed area?</p> <p>Does the typo in the phrase "has discussed and affirmed its intentions to. Hold a new educational structure" mean that you are building new? Or are you retrofitting an existing structure? Can you provide more details? - deborahbrownnc</p>
<p>Financial Plan</p>	<p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Bus driver is listed...however not included in transportation narrative.</p> <p>How is it possible to have 3 teachers but 9 grade levels in year 1?</p> <p>Budget does not reflect the projected student enrollment. - jengnann</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> How will the school function without a paid finance officer during the first few years of operation? How will AECS attract administration if no retirement is offered/funded? Benefit numbers (health insurance, disability, etc.) seem very low. - jonathanbryant</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> are your proposed salaries in line with the local LEA so you can attract and retain quality personnel? - deborahbrownnc</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Does your classroom technology budget include devices? If so, do you consider the amount projected to be sufficient? - shaundacooper2</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> How will \$500 cover the cost of professional development for an entire staff for an entire school year?</p> <p>How will an entire school be outfitted with only \$2000? - jengnann</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> No financial contract or finance officer budgeted for the first few years is very concerning - how will finances be monitored/accomplished? Lease/mortgage is not projected to rise in 5 years? Is water expense part of the lease? If \$40,000 is for purchasing busses, how will AECS maintain these without any budgeted monies? Is there any budget for computers/classroom technology for teachers? - jonathanbryant</p> <p><u>Total Expenditure Projections (Table)</u> Items listed in the budget do not accurately reflect what is written in the narrative. Therefore, projections do not reflect the application. - jengnann</p>

	<p><u>Budget Narrative</u> The applicant has provided a realistic plan regarding the projected sources of revenue and projected expenses that ensure the financial viability of the public charter school. The only follow up question is regarding plans for classroom technology. - shaundacooper2</p> <p><u>Budget Narrative</u> Why will students choose this school? What is the break-even number?</p> <p>What will happen at the school level if the enrollment is not what is expected?</p> <p>How will the budget support the building of a new school if no outside money is available and the school is "based solely upon county, state, and federal funds"?</p> <p>How will a fund balance be built if 95% of the budget is consistently spent? How will emergencies be planned for? - jengnann</p> <p><u>Budget Narrative</u> Is there not sufficient flexibility in staffing that if enrollment targets are not met, the school would be required to take on additional debt, grants or loans as a first step? School mentions that it will own the land the school facility is to be built on, what financial arrangements, and /or conversations have taken place with a lender to enable school to purchase said land? - arkagan</p> <p><u>Budget Narrative</u> Financial contingency plan is inadequate and lacks sufficient detail. What is the break-even point for student enrollment? - jonathanbryant</p> <p><u>Budget Narrative</u> What sources do you have for trying to "seek out bankers, pull on the resources of our stakeholder, school fundraisers, also apply for grants." - deborahbrownnc</p> <p><u>Financial Audits</u> Acadia Northstar is listed here, but not included in the budget.</p> <p>How will bids from other companies be acquired? - jengnann</p> <p><u>Financial Audits</u> Does the school have an auditor identified? - arkagan</p>
<p>OVERALL</p>	<p><u>Cover Page</u> This application was incomplete and the deficiencies were not remedied within the allowed time. Pursuant to State Board Policy CHTR-012(b) "The Charter School Advisory Board . . . shall reject all incomplete applications." - dswalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> After reviewing the survey data that was submitted in appendix A, it appears that only 65% of the 117 families surveyed showed high and moderate interest in attending the school. How was the first year enrollment determined? At 76 students roughly, does this plan account for siblings? - shaundacooper2</p>

Charter School Advisory Board Subcommittee

Academy of Excellence Charter School - The Academy of Excellence Charter School's mission is to provide a quality academic experience with the collaboration of parents, teachers, and the community that cultivates 21st Century learners for global success.

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

Overall Summary

<p>Initial Screening</p> <p>09/27/2017</p>	<p>The Office of Charter Schools deemed this application incomplete on September 27, 2017. The following is needed to begin the application evaluation:</p> <ol style="list-style-type: none"> (1) The student conduct section requires information beyond a reference to another portion of the application (i.e. student handbook). (2) Information needs to be provided in the facility section related to the cost per square foot breakdown. (3) Board member forms are not provided for Latoya Peterson, Myrah Lykes and Tasha Davis. (4) Background check results are not provided for any board member in Appendix F. <p>Applicant did not respond to the incomplete information submission by the October 4, 2017 deadline.</p> <p>Applicant responded to incomplete information submission on 12/6/2017 at 12:31 pm.</p>
<p>Application Review</p>	<p>Mr. Walker led the discussion and requested that during the brief overview of the applicant OCS confirm what portion of the application was missing.</p> <p>OCS provided a brief overview of the proposed application including proposed county, proposed enrollment for the first five (5) years, and if the application had an LEA impact statement and/or due diligence. The incomplete information as requested by CSAB was the criminal background check information.</p> <p>Mr. Walker stated pursuant to SBE policy that the CSAB shall reject all incomplete applications, given that this applicant provided documentation outside the timeline to submit missing information. Mr. Walker opened the floor for any representative of the Academy of Excellence to address the CSAB. None were present.</p> <p>Mr. Walker made a motion that we do not move Academy of Excellence forward. Mrs. Kakedelis seconded. Motion passed unanimously.</p>

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Application Interview	
OVERALL	Mr. Walker made a motion that we do not move Academy of Excellence forward. Mrs. Kakedelis seconded. Motion passed unanimously.