

Steele Creek STEM Academy - Steele Creek STEM Academy will promote high academic achievement by increasing student engagement through a workshop model that encourages and empowers students to take ownership of their learning.



### 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:

Arasi Adkins  
Tammi Sutton  
Deanna Townsend-Smith  
Steven Walker  
Kenneth Tucker  
Cheryl Turner  
Alan Hawkes  
Alex Quigley  
Jessica Kelly  
Joe Maimone  
Lindalyn Kakadelis  
Les Stein  
Lynn Kroeger  
Phyllis Gibbs  
Robert McOuat  
Shannon Stein  
Sherry Reeves  
Heather Soja

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**Date of Review:**

09/27/2017

Steele Creek STEM Academy - Steele Creek STEM Academy will promote high academic achievement by increasing student engagement through a workshop model that encourages and empowers students to take ownership of their learning.



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **Steele Creek STEM Academy**

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

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

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

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

**CHARTER SCHOOL**  
**2016 Application Process**  
**To open a charter school in the 2018-2019 school year**

**APPLICATION DUE DATE/TIME**

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

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

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

**APPLICATION SPECIFICATIONS**

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

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

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AGREEMENT PAGE

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Total External Evaluator Votes 83

Total Subcommittee Votes 83

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Charter School Advisory Board Subcommittee 90

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## I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Steele Creek STEM Academy

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

Name of non-profit organization under which charter will be organized or operated: *Alliance Preparatory Schools, Inc*

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

Name of contact person: *Jose Garcia*

Title/Relationship to nonprofit: *Board Chair*

Mailing address: 927 Littleton Drive  
Concord NC 28025

Primary telephone: 954-445-1474 Alternative telephone: 954-445-1474

E-Mail address: jag8236@gmail.com

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

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

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

No:

Yes: X

If so, provide the name of the third party person or group. Alliance Education Services, Inc.

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

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

The majority of this application's content was written by the board in their original successful application for Mallard Creek STEM Academy. To that end, this application is a replication in the spirit of that extremely successful school by its board. There is language and terminology that

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Alliance Education Services, INC. a non-profit charter support and consulting firm, assisted with and which may appear in other charter school applications. Upon successful approval of this application, any involvement by Alliance Education Services will conclude and the board at its sole discretion may elect to utilize Alliance Education Services or any other charter school consultant/firm to assist with the opening and successful operation of the school.

*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:

*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? Alliance Preparatory Schools, Inc*

*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:

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*Proposed Grade Levels Served and Total Student Enrollment (*

*5*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
Year 1	K, 01, 02, 03, 04, 05, 06	554
Year 2	K, 01, 02, 03, 04, 05, 06, 07	665
Year 3	K, 01, 02, 03, 04, 05, 06, 07, 08	798
Year 4	K, 01, 02, 03, 04, 05, 06, 07, 08	798
Year 5	K, 01, 02, 03, 04, 05, 06, 07, 08	798

*The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school finances and student performance.*

*I certify that I have the authority to submit this application, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the non-profit organization.*

steelcreek  
*Signature*

Board Chair  
*Title*

steelcreek  
*Printed Name*

09/22/2017  
*Date*



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<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<u>Why does the applicant state that the application is a replication of the one used by Mallard Creek STEM Academy, but when asked if this is a replication of a current charter school model the response is "no."</u>	<u>Les Stein</u>	<u>Cover Page</u>
<u>Applicant states that "to that end, this application is a replication in the spirit of that extremely successful school by its board." Though the applicant selected "no", is this a replication?</u>	<u>Kenneth Tucker</u>	<u>Cover Page</u>
<u>Why are the enrollment numbers so high for a brand new school? The enrollment goals are not realistic.</u>	<u>Arasi Adkins</u>	<u>Grade Levels</u>
<u>Lofty enrollment goals and many grade levels to start</u>	<u>Heather Soja</u>	<u>Grade Levels</u>
<u>Concerned about meeting enrollment target</u>	<u>Lynn Kroeger</u>	<u>Grade Levels</u>
<u>Is starting with 7 grades optimal, especially when one is at a different level (I.e. MS)?</u>	<u>Shannon Stein</u>	<u>Grade Levels</u>
<u>Will the area handle this enrollment?</u>	<u>Steven Walker</u>	<u>Grade Levels</u>
<u>large first year, convince us how you can meet target?</u>	<u>Joe Maimone</u>	<u>Grade Levels</u>
<u>High enrollment numbers for year 1. Explanation needed.</u>	<u>Jessica Kelly</u>	<u>Grade Levels</u>

<b>Reviewer</b>	<b>Score</b>
<u>Arasi Adkins</u>	<u>Fail</u>
<u>Tammi Sutton</u>	
<u>Deanna Townsend-Smith</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Kenneth Tucker</u>	<u>Pass</u>
<u>Cheryl Turner</u>	
<u>Alan Hawkes</u>	
<u>Alex Quigley</u>	
<u>Jessica Kelly</u>	<u>Pass</u>
<u>Joe Maimone</u>	<u>Pass</u>
<u>Lindalyn Kakadelis</u>	<u>Pass</u>
<u>Les Stein</u>	<u>Pass</u>
<u>Lynn Kroeger</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Robert McQuat</u>	
<u>Shannon Stein</u>	<u>Pass</u>
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Heather Soja</u>	<u>Pass</u>

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## **II. MISSION and PURPOSES**

(No more than three total pages in this section)

### **Mission:**

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

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

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

SCSA will provide an educational environment of academic rigor and relevance that promotes high student achievement. Steele Creek STEMs administrators and teachers will lead this effort by creating a school environment whereby the faculty, families and community are committed to the mission. The overarching goal is to increase student engagement, via a workshop model of instructional delivery with a fully integrated STEM focus, that will raise student academic achievement.

### **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.*

Steele Creek has been identified as the targeted community for this application. It was purposefully selected by the Governing Board to meet an unmet need in this area of CMS and possibly Gaston County. It is the boards opinion that our widely popular and successful charter school can bring this specialized program into an area that has limited schools of choice and no schools that offer a workshop/STEM educational plan. Our integrated approach to teaching and learning has invigorated the staff, parents and students in Mallard Creek and we hope to bring this same opportunity to those families in the Steele Creek region. The model is designed to increase academic achievement for ALL learners. The workshop model is designed to provide differentiation thus the instructional delivery supports at risk, on level and accelerated students. It is also structured to support ELL and EC students and enables the School to offer students support through an inclusion model whenever possible. We have seen the success of this model in MCSA in its first year and truly believe it will serve the diverse student population in an area that does not have high performing schools. We believe our program will engage students and provide supports and differentiation that will prove to be effective.

"The Charlotte-Mecklenburg Schools are experiencing growth similar to that within the county. On average, the school district has grown about 1.3%

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annually since the 2007-08 school year. This equates to about 1,900 students per year. Most of our growth has been evidenced within the northern and southern portions of the county; however, we have experienced growth throughout all segments of the county.

It is anticipated that this growth trend will continue for at least the next ten years. Given the changing demographics of our school-age population and the amount of growth we anticipate, CMS will continue to face challenges as we plan for student assignment and how we can best meet the needs of each child we serve."

(<http://www.cms.k12.nc.us/cmsdepartments/StudentPlacement/PlanningServices/Pages/Charlotte-MecklenburgSchoolsDemographicOverview.aspx>) There are currently almost 148,000 k12 students in CMS including;

African American 38%; Hispanic 24%; White 29%; American Indian 3%; Asian 6% students. SCSA expects to mirror the local community which historically has higher minority populations in attendance and hopes to deliver a very racially diverse, balanced program similar to Mallard Creek which is a racially balanced program that provides equity in access for all students. This location is targeted based upon historical growth models in population and demand for seats in schools as well as local ties to this community from Board members. It is the Boards mission to provide a STEM/Workshop model for the students in this region which has been incredibly successful and appreciated in Mallard Creek.

(<http://www.cms.k12.nc.us/mediaroom/Documents/CMS%202017-2018%20Fast%20Facts.pdf>) Steele Creek is primarily served by Kennedy Middle, Southwest Middle, Lake Wylie Elementary, Steele Creek Elementary, Winget Park Elementary, River Gate Elementary, Berewick Elementary and Palisade Park Elementary.[9]

These elementary and middle schools have average to below average performance scores evidenced. We believe that our educational model will engage students and the professional development offered for teachers will increase the capacity of the educational pedagogy in such a way as to increase the performance of students both individually and collectively. Our school intends to serve all students equally, and will provide the same support serves as we do at Mallard Creek including NSLP, Bus transportation, early and aftercare and a comprehensive MTSS program.

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

Our projected enrollment table through year five includes a total of 798 students which represents approximately less than 1% of the total district population of 105,000 students K8.

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

Steele Creek STEM Academy is designed to offer students a unique educational experience that will provide them the resources and support they need to build their STEM skills as well as their mastery of English Language Arts and Social Sciences. The primary goal of Steele Creek STEM Academy is to enable the school to meet its mission to promote students who are:  
\*academically superior as demonstrated by their proficiency scores

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\*socially engaged as demonstrated by their community awareness and

involvement

\*prepared for challenging academic programs and careers as demonstrated through their participation in and mastery of STEM projects

The vision of SCSA is to provide students the opportunity to participate in an interdisciplinary designed curriculum including a focused STEM program to help them engage with their teachers and their peers in such a way to increase the academic performance and growth for all students. The School is unique in that it will:

1. Partner with the Teachers College of Columbia to become a Home Grown Institute for the Teachers College Reading and Writing Project. The TCRWP was developed by Lucy Calkins, a pioneer in research based Reading and Writing instruction, author of "Pathways To The Common Core" and leader of professional development for instructional pedagogy. The mission of the Teachers College Reading and Writing Project is to help "young people become avid and skilled readers, writers, and inquirers. The organization has developed state-of-the-art tools and methods for teaching reading and writing, for using performance assessments and learning progressions to accelerate progress, and for literacy-rich content-area instruction". (<http://readingandwritingproject.com/about/overview>) The workshop model offers an interdisciplinary approach to teaching and learning that allows teachers to simultaneously strengthen reading and writing skills while teaching content. Students will read content rich materials, work in response journals throughout the day and increase their level of engagement with the learning by participating in academic conversations, hands-on activities and thoughtful responses.

2. Partner with Discovery Place to provide a focused and intensive STEM program that includes curriculum and resources that are research based and supported by instructional experts. Teachers will have initial and ongoing professional development to support their instruction of STEM subjects and to provide internal benchmark assessments of teacher and student aptitudes as well as performance. Discovery Place will conduct longitudinal studies of student growth and help teachers refine instructional pedagogy to improve student performance. Students will master progressive STEM skills by completing projects in each domain with the support of integrated technology, hands-on activities and onsite/offsite learning modules that are aligned to NC Standards.

Steele Creek STEM Academy will teach the NC Standard Course of Study to ensure student success on all State assessments. It is the instructional delivery model and professional capacity of the staff that makes this school unique. Instructional leadership at SCSA will help teachers help students meet the demands of increased rigor of grade level expectations by providing professional development for the teachers to build the capacity of their instructional pedagogy. The workshop delivery model was developed through the Teachers College of Columbia based upon the research of Lucy Calkins, that incorporates, explicit instruction, paired and group learning activities, and individual practice that is differentiated to meet the needs of each unique learner. The focused inclusion of a STEM curriculum supported by STEM experts will develop content mastery in those critical subjects. LEGOS and Robotics as electives will supplement the core curriculum and provide real life connections to the content.

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

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

*The Six Legislative Purposes of a Charter School are:*

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

The program developed by SCSA will meet all 6 legislative purposes of a charter school per GS 115C-238.29A.

1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site and 6. Encourage the use of different and innovative teaching methods that 3. Provides parents and students with expanded choices in the types of educational opportunities that are available within the public school system.

The teachers will participate in one of the most widely-praised professional development programs which will allow them to take ownership in the learning program at this School. The School has developed a relationship with The Teachers College of Columbia (NY) to become a Home Grown Institute for The Reading and Writing Project (TCRWP). This partnership will require the leadership team to participate in intensive professional development workshops and conversations to develop leaders as instructional coaches, share best practices, and build the capacity of instructional staff. The leadership team will learn how to build connections and skill development across disciplines by bringing content-area teachers and administrators into the conversation about literacy instruction, creating a space for cross-content projects, shared understandings of standards, and community building around curriculum. Training is also provided to help leaders and teachers understand and work with the measures of student learning. Prior to opening, all teachers will participate in a 4-5 day institute training tailored to the needs of the school that includes: A Reading Institute (Grades K-8) A Writing Institute (Grades K-8) and Specialized Development for Middle School

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Teachers.

Discovery Place will provide specific and focused training in STEM instruction for all teachers. This intensive training that will be delivered in the summer prior to opening and through ongoing PD partnerships with Discovery Place will ensure that teachers develop a specialized skill set in delivering grade level appropriate STEM lessons, enrichment and extension activities to engage students and activate prior knowledge and measure

student growth. The workshops and development will be tailored to the unique needs of the students, teachers and School.

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

SCSA will implement with fidelity an educational plan that utilizes a data-driven approach to teaching and learning that incorporates research based materials and instructional methods to enable all students to make adequate yearly progress to meet grade level expectations for proficiency and growth. SCSA will administer MClass, Case 21, EOG's, and EOC's. All teacher evaluation data will be uploaded into NCEES to provide open communication with the LEA and state, but the School will also administer evaluation tools developed by Charlotte Danielson and Discovery Place to measure teacher effectiveness as it relates to our specific program and student growth. These collective reports will be shared with the Governing Board as available to help the Board review and assess student achievement. Report cards will include standard grades that reflect student performance as well as indicators of success for expected grade level performance. The "standards-based" report will describe the students current levels of mastery in expected grade level content areas. Home reports will also include performance assessment data as it becomes available. SCSA will publicly share all scores available through the NC Accountability program (ABC Reports, EVAAS, NC Report Cards) as required by Read to Achieve, on the school website, through newsletters and through onsite conferences. The School calendar has been created to include a fall and spring conference night, as well as quarterly data chats that will be student-driven and teacher facilitated grades 3-8.

Teacher performance will be measured by an integration of student performance data with the Charlotte Danielson Framework For Teaching (2013).

3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system SCSA is open to all students eligible for enrollment. This school will offer families a unique choice in the educational program that includes a specialized instructional delivery model, an intentional instructional focus on STEM and a programmatic plan that requires communication, cooperation and collaboration from all stakeholders to ensure student achievement and parent satisfaction. Both of these goals will be measured through formative and summative assessments and surveys. SCSA will meet each child where they are, and student achievement will be measured through individual and collective progress as structured by the work of John Hattie in Visible Learning For Teachers. (2012) Teacher performance will be measured by an integration of student performance data with the Charlotte Danielson Framework For Teaching (2013) The School will implement with fidelity an educational plan that utilizes a data-driven approach to teaching and learning that incorporates research based materials and instructional methods to enable all students to make adequate yearly progress to meet grade level expectations for proficiency and growth. School representatives will provide parent

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informational sessions designed to educate the families with respect to the Schools selected curriculum delivery model, curricular resources, business partnerships and student/parent expectations. Parents will understand The Schools daily schedule, course offerings, discipline plan and avenues of parent support and volunteer opportunities. Parents will have the opportunity to understand the educational plan and choose to enroll their child into the program that offers a diverse educational opportunity and provides a unique experience to meet the needs of the whole child.

4. Improving student learning and 5. Increasing learning opportunities for

all students, with a special emphasis on at-risk or gifted students.

The School is uniquely designed to meet the needs of all students by meeting the requirements and ideals of the recently adopted ESSA of 2015. The ESSA retains the hallmark annual standardized testing requirements of the 2001 No Child Left Behind Act but shifts the law's federal accountability provisions to states. Under the law, students will continue to take annual tests between third and eighth grade.[5] Another primary goal of the ESSA is preparing all students, regardless of race, income, disability, ethnicity, or proficiency in English, for a successful college experience and fulfilling career.[7

[https://en.wikipedia.org/wiki/Every\\_Student\\_Succeeds\\_Act](https://en.wikipedia.org/wiki/Every_Student_Succeeds_Act))

Through The Schools partnerships with The Discovery Place and with TCRWP, teachers will have Running Records, Spelling Inventories, and Text Selections for Close Reads that will help teachers identify students strengths and weaknesses, target specific areas in need of improvement, and alternative means to measure progress through ongoing performance assessments and portfolios. The workshop model enables teachers to meet the individual needs of all students by allowing them to practice grade level expectations with individual level resources. Students will practice reading and writing with text selections aligned to their personal level of proficiency, thus allowing teachers to differentiate instruction and meet the needs of struggling students while scaffolding them towards grade level expectations and challenge advanced learner. Our students will also work on long term problems/projects in STEM subjects that teach critical thinking supports "out of the box" learning. The hands-on activities will engage learners, activate their participation and require them to work collaboratively with their peers.

### **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.*

Operations, Finance, Governance:

The Board will meet monthly to review reports including but not limited to; LINQ, Powerschool, EVAAS Discovery Place and other assessments as they become available at each meeting.

There will be 6 components used to measure financial and operational goals:  
Student enrollment as reported through Powerschool (monthly/ongoing) Goal: 95% target enrollment

Budget V. Actual Expense Reports as reported in LINQ and prepared by contracted financial services (monthly/ongoing) Goal: meet 95% budget

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expectations

Financial Audit as reported by an independent Audit firm to measure financial efficacy, responsibility and stability (yearly/every year) Goal: No Management Comments

Parent and Staff Satisfaction as measured through valid climate surveys (yearly with 85% or greater satisfaction overall)

Completion of formal governance training Goal: 100% Board members will complete

Academics:

Teachers will use all data available, for both general education and special education students, to set baselines and assess student progress in comparison to classroom collected data and progress monitoring data. Baseline data will also be utilized to determine the level to which educational goals and performance standards have been met. This measurement of student growth will also be utilized to quantify how well the specific measureable objectives, identified in the charter school application, were met during the first year of operation. This first year baseline data will also be made available to stakeholders and the community at-large as we communicate year one goals for review. Pre- and post-testing in Year one, as well as reports from previous school records, will be collected as baseline to measure progress in Years one, two, three, and beyond, and as an integral part of the planning and refinement of instructional strategies.

Baseline data will include standardized test scores, report card grades, attendance reports, behavioral records, and IEP /EP and or ELL Plans (as applicable). This data will be compared to current data at the end of each school year. For example, EOG Scores from 2017 will be used as a baseline. Based on the schools philosophy of providing differentiated instruction, that respects the differing learning styles of students, the school will use data (state and district requirements, report cards, test scores, past performance and comporment data) as factors for placement into the appropriate cohorts in an attempt to set students up for success. Specific, Measurable Goals include:

SPG scores will ultimately (in 5 years) grow +15% higher than the local average.

In year one we expect:

Reading: will be +8% higher than the local average.

Math: will be +10% higher than the local average

Science: will be +3% higher than local average

School will "exceed expectations" in growth

All students will make at least 1-years worth of academic gain in each core subject measured based on initial and final benchmarking assessments. (specific goals table in the appendices)

Finally, as part of the Schools mission to provide a true STEM initiative, student participation and performance (demonstration of growth and mastery) in the STEM components will play a very integral role in assessing the Schools performance. Students will be expected to show increased gains and superior performance in the areas of engineering, technology. We expect our students to successfully participate in school wide, local, regional, state levels of competitions. Key elements of the STEM initiative include the following: Athletics, Science Olympiad, FIRST Robotics/VEX, STEM/Engineering fairs.

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



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Governance effectiveness is a direct correlation to the measurement and achievement of the goals articulated above. It is the Board's responsibility to provide the oversight and support that enables the School to meet all of the goals for Academics, Operations and Finances. If the School has met or exceeded its goals in those categories, the Board will have met its obligation to The School, the LEA and to the State.

The governing board is comprised of local community members and parents with a vested interest in the schools long term viability and success. The Governing Board will hold monthly, open meetings that require the onsite administration will attend and present monthly reports inclusive of enrollment, academics, compliance, fundraising efforts, community relations and other information as available.

The Governing Board review survey data collected each spring as well as academic data to measure The Schools success and to provide feedback that will be used to create a School Improvement Plan aligned to the North Carolina Continuous Improvement Model.

The School has set for itself 3 overarching goals to graduate students who are:

1. academically superior as demonstrated by their academic achievement scores
2. prepared for challenging academic programs and careers as demonstrated through their engagement and mastery of STEM projects and successful participation in academic competition as well as their articulation into and success in High School
3. socially engaged as demonstrated by their community awareness and involvement

At the end of each year, the Governing Board will know that the school is working towards their mission statement by reviewing the student achievement reports and comparing them with other LEA schools. The expectation is that the school's instructional program via a workshop model will help increase student performance and yearly achievement gains. The STEM program implemented by professionally trained teachers will improve students' understanding and mastery of STEM subjects. The Board will also confirm that students are participating in community events and service learning activities.

The School will have met all areas of compliance in the NC Performance Framework.

The Governing Board will work cooperatively with its contracted service providers to ensure academic accountability, fiduciary responsibility and community engagement. The Governing Board will receive and review monthly financial statements and academic progress reports, provided by site based leadership, to ensure that expenditures and academic results are consistent with the goals of the district and the charter. The Governing Board has local control over the budget and approval of expenditures and is responsible to ensure compliance with the charters contractual obligations.

The Governing Board will contract with an independent financial services provider to ensure appropriate segregation of financial duties and

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reporting. Each year the Governing Board will review the audits, and set appropriate budgets that utilize the school's revenue and resources to meet the previously identified goals.

The Governing Board will review yearly climate surveys from Parents and Staff and will review yearly attrition rates, enrollment targets and staff retention rates (including SAR).

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<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<b>Mission statement is not strong.</b>	Jessica Kelly	Mission Stat
<b>Evidence of need is not fully shown. The map with other charter locations shows Unity Classical Charter School the closest - that school has not been able to fill their seats. - We also just approved another charter for this area. Does the board expect some on their current waiting list to travel to this area of the county?</b>	Lindalyn Kakadelis	Mission Stat
<b>The language reads as though this is an attempted replication of Mallard Creek.</b>	Kenneth Tucker	Mission Stat
<b>Do you have specifics to explain that the performances of the public schools in the LEA perform at or below average?</b>	Les Stein	Mission Stat
<b>this application refers to Mallard Creek Charter - that school has only been in operation two years. Last year was a C school - did not make growth.</b>	Lindalyn Kakadelis	Educational
<b>Aside from contracting with Teacher's College and Discovery Place, what makes Steele Creek different from traditional public schools (who are also very focused on developing student skills in STEM and literacy? What if traditional schools contracted with those same agencies? What would differ at Steele Creek?</b>	Arasi Adkins	Educational
<b>Applicant should provide more detail on its STEM curriculum. The writing component is strong in detail while the other lacks.</b>	Heather Soja	Educational
<b>Concerned about meeting enrollment projections</b>	Lynn Kroeger	Educational
<b>In first part of application it states this is not a replication of another charter however many times here it is stating that it is a replication of Mallard Creek. This is contradictory.</b>	Jessica Kelly	Educational
<b>Do the traditional public schools partner with the Discovery Place? Are any of them partnering with the Teachers College? If so, what makes Steele Creek STEM Academy's education plan different than the LEA.</b>	Kenneth Tucker	Educational
<b>How has the school already created a strong relationship with the Teachers College when they are not yet established? Again indication this is a replication.  What is the additional cost/agreement in partnering with Discovery Place?  Please clarify What growth you expect to see with your targeted population.</b>	Jessica Kelly	Purposes of
<b>Can you explain what you mean by "developed a relationship with the Teachers College of Columbia?" Do you have an agreement with them? What does the relationship entail?  What is the basis for using Charlotte Danielson and Discovery Place to measure teacher effectiveness? Will your administrators be trained to evaluate teacher performance?  What specific achievement levels will you be looking for at each grade level? What kind of growth in student performance do you expect the school to show between each year? How many students will be at grade level after years, 1, 2, 3, etc?</b>	Les Stein	Purposes of
<b>STEM specifics need additional support and evidences for a genuine cross curricular approach.</b>	Heather Soja	Purposes of
<b>How does this differ from traditional public schools? Couldn't this be implemented there? Why is there a need for a charter school to offer this?  How will you ensure equitable parent involvement and participation? What will the parent outreach look like for historically under-served groups?</b>	Arasi Adkins	Purposes of
<b>Please provide specific details on the relationship with The Teachers College of Columbia. Is it a formal partnership with some kind of official agreement (i.e. MOU, contract, etc.).</b>	Kenneth Tucker	Purposes of
<b>Why do you base your growth expectations on the local average? If the local average is low will your growth figures adequately define the success of your school?</b>	Les Stein	Goals for th

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<b>Concerned about the enrollment expectations. Need more survey data regarding interest in school What do they mean by "local average?"</b>	<b>Lindalyn Kakadelis</b>	<b>Goals for th</b>
<b>Clarify what data is being used for local average.</b>	<b>Jessica Kelly</b>	<b>Goals for th</b>
<b>What do you mean by "local average"? All of Charlotte-Mecklenberg Schools? NC state averages? Just those schools where you propose to siphon off students for this charter school?</b>	<b>Arasi Adkins</b>	<b>Goals for th</b>
<b>How will some of the operational goals be measured? (I.e. adequate food, etc.)</b>	<b>Shannon Stein</b>	<b>Goals for th</b>
<b>What will the academic goal be if the proficiency level is below 90%?</b>		
<b>STEM curriculum needs detail and focus. Clubs and competitions do not equate to a STEM-focused school. What does a language arts class look like with STEM integration? What about social studies and STEM?</b>	<b>Heather Soja</b>	<b>Goals for th</b>
<b>Applicant needs to clarify what they mean by "local average".</b>	<b>Kenneth Tucker</b>	<b>Goals for th</b>

<b>Reviewer</b>	<b>Score</b>
Arasi Adkins	Pass
Heather Soja	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Kenneth Tucker	Pass
Cheryl Turner	
Alan Hawkes	
Alex Quigley	
Jessica Kelly	Pass
Tammi Sutton	
Sherry Reeves	Pass
Shannon Stein	Pass
Robert McOuat	
Phyllis Gibbs	
Lynn Kroeger	Fail
Les Stein	Pass
Lindalyn Kakadelis	Fail
Joe Maimone	Pass

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### **III. EDUCATION PLAN**

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

The educational focus of the School is a thoughtful and purposeful STEM program designed to provide our students with a creative and challenging student-centered learning environment. The STEM program will be implemented through a cross curricular delivery method that will encourage and enable students to become globally competitive. This fully integrated STEM program will meet the needs of all learners by engaging students through a hands-on technology infused educational environment that is meaningful and purposeful in its scope and sequence. This will be fostered with the implementation of a relevant and rigorous workshop model.

STEM education encompasses the processes of critical thinking, analysis, problem solving, and collaboration in which students integrate the processes and concepts in real world contexts of science, technology, engineering, and mathematics, fostering the development of STEM skills and competencies for college, career, and life . This idea is supported by a statement from engineeringforkids.com wherein they state "STEM education creates critical thinkers, increases science literacy, and enables the next generation of innovators. Innovation leads to new products and processes that sustain our economy. This innovation and science literacy depends on a solid knowledge base in the STEM areas. STEM activities provide hands-on and minds-on lessons for the student. It is critical to provide such opportunities to all learners. STEM education helps to bridge the ethnic and gender gaps sometimes found in math and science fields. Initiatives have been established to increase the roles of women and minorities in STEM-related fields. STEM education breaks the traditional gender roles (Engineering for Kids, 2016). The core curriculum in Reading will meet the guidelines for NC Standard Course of Study and include the six components of Reading: phonemic awareness, phonics, fluency, vocabulary, comprehension and oral language. Teachers will work with the emergent readers in a phonics and word study program developed by Fountas and Pinnell. They will also use "words their way" to supplement some of the phonics and word study work. We will utilize the Reading Units of Study developed by Lucy Calkins and Teachers College Reading and Writing Project (TCRWP) out of Columbia University to assist with the reading pacing and scope and sequence K 8. Students will also receive instruction in various levels and genres of text. Small group instruction will be given at their guided reading instructional level, in addition to differentiated literacy work stations to support specific learning goals/targets. The Units of Study in Writing developed by Lucy Calkins and TCRWP will help develop the students mastery in multiple writing genres and writing an inclusive grammar and conventions instructional plan embedded into the Writers Workshop. Again, the Units of Study in Writing

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assist in the pacing and the scope and sequence to ensure a variety of genres are taught K - 8.

NC Social Studies and Science standards will be taught throughout Reading and Writing workshop, as well as through hands-on extension activities and projects. For example, if a first grade is studying animal habitats, in reading they may use an Interactive Read Aloud, such as *Stellaluna* during Reading Workshop and during Writing Workshop, they may work on a non-fiction piece of writing that describes their chosen animals habitat. STEM projects will be utilized to teach the majority of the NC Science standards, so a project could include designing a habitat for a chosen animal. The Math core will be aligned to NC Standard Course of Study and will include small guided math groups, work stations, vocabulary, shared writing, math journaling, calculation, and word problems. The STEM component will include science projects, coding and engineering activities and multiple forms of real-life applications for data gathering, assessment and graphing.

### **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.*

In order to meet our goals, the school must design and implement effective classroom environments. Research by SUSAN C. STEWART, WILLIAM H. EVANS, and DAN J. KACZYNSKI in the article; *Setting the Stage for Success: Assessing the Instructional Environment* (Preventing School Failure v41 p53-6, 1997) indicates that the physical and instructional environment play integral roles in school success. All classes will meet class size reduction requirements and the average student/teacher ratio will be 1:18 in the elementary and 1:20 in middle school.

Support staff for EC, AIG and ELL students will provide additional small group instruction. The facility plan calls for classrooms with additional rooms for media, science labs, technology and multi-purpose spaces. Within The physical environment will meet the needs of the students appropriate by grade level. Elementary classrooms will include student tables for group and center work with a gathering area rug for whole group instruction. All classrooms will include space designed for classroom libraries and independent work areas. Wall space will be designed to include instructional boards and space for student work displays. In the middle school, students will have individual desks for movement in the classroom, but the desks can be easily moved together for collaborative activities and tasks. Teachers will be able to provide direct whole group instruction and allow students to move their desks to work in groups and pairs. Individual seating also allows for an appropriate testing environment and independent learning. Seating arrangements for all children must be carefully considered. The teachers desk will allow a broad view of the classroom and all students. Young students may be seated in small clusters at tables to promote language interaction and social/emotional skill development, whereas older students may require flexibility in seating to accommodate instructional style and specific class activities. "An aesthetically pleasing environment can influence behavior. Many areas may be used to display work or materials, post class rules, provide schedules and feedback charts, list daily assignments, and highlight new skills. Bulletin boards and walls should be visually appealing, uncluttered, and changed frequently. At the elementary level especially, students should have a place to store personal materials

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and to sit during activities. (Stewart and Evans, 1997)

In Classroom Spaces That Work by Marlynn K. Clayton and Mary Beth Forton they discuss the importance of setting up your classroom to fit the needs of the students not the adults. We will make the classroom fit the childrens bodies. So, we will estimate the range of sizes based on whats typical for that age. We will use this estimate to:

- \* Choose desks, tables, and chairs that fit the children.

- \* Select and arrange bookcases and shelves. In general, children should be able to see and be seen over any shelves. Taller shelves should be placed along the perimeter.

- \* Determine where to locate display areas. Displays meant for children should be at their eye level whenever possible.

- \* Plan the amount of space needed for class meetings. When children are sitting in a circle on the carpet, there should be approximately three inches between children.

- \* Plan enough space for table work. Keep in mind that when children sit at a table to work, they need "elbow room" and space to spread out materials.

- \* Utilize space that best meets the needs of the students and provides flexibility for independent and cooperative learning.

\*

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 schools foundation is a data-driven model of instruction using researched based curriculum and materials to promote increased academic achievement. The selected curriculum materials are based on current research and were chosen to align with the Schools Educational Plan. Great care was taken in the selection of our chosen curriculum materials, founded in research and best practices, and alignment to the North Carolina Standards and the Next Generation Science Standards. Additionally, these curricular choices are in direct alignment with the Schools mission and vision.

Teachers College Reading and Writing Project (TCRWP) was developed by Lucy Calkins to help teachers teach their students at the ever increasing higher level expectations and standards in reading and writing. We will provide the curriculum needed to promote and support the workshop model of instruction in reading, writing, and math and STEM to improve student performance:

- \*All grade level anchor text selections required for ELA as part of the Fountas and Pinnell Guided Reading program and TCRWP in grades K-8. The guided reading text sets and the mentor texts satisfy the requirements for all genres and achievement levels in Reading and Writing at every grade level (sample included in appendix)

- \*All assessment materials needed to measure ongoing progress in Reading/Writing including inventories, running records and close reading

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selections

\*Intervention materials and leveled readers for small group and MTSS, such as the Leveled Literacy Intervention Kits

\*Words Their Way and the Fountas and Pinnell Phonics and Word Study Series

\*Intervention materials for ELL and EC students

Go Math!, has shown that major research strands that were incorporated into the GO Math! Program: Writing to Learn, Vocabulary, Scaffolding, Metacognition, and Graphic Organizers." (Eddy, et al., 2014). These embedded strands enhance the instruction of mathematics while simultaneously incorporating strategies that support reading and writing development.

Legos Educational Program - Legos Education provides a myriad of STEM activities for students in grades K-8 that blend grade level content standards with a technology infused delivery and hands-on projects to teach mathematical, science and engineering topics, concept through execution. The Legos program is a balanced curriculum that also incorporates literacy (Reading and Writing). The adopted program for Elementary students includes: WEDO STEM projects, Story Starter, Build to Express, More to Math and Simple Machines

\* EiE curriculum products have been created using rigorous, research-based design principles. Contextual Learning and Problem Solving. EiE engineering design challenges show students how what they learn in school connects with the world around them.

Collaborative Learning and Teamwork. Most EiE activities involve small-group work that encourages students to consider more than one solution or idea and work collaboratively.

Communication. All EiE curricula develop students communication skills and encourage them to share ideas in several ways: speaking, writing, drawing, and building.

Project-based Learning. EiEs engineering design challenges engage students in inquiry.

Social Studies and Science literacy will be taught through high interest, non-fiction based leveled readers, novel studies, news articles and journals. Examples are included in appendix B

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.*

We will use of innovative teaching strategies and methods through an interdisciplinary approach to teaching that will help students "go deeper" into the content, and transfer newly acquired knowledge across subject areas. The school will implement a three-pronged approach to innovative teaching and learning methods: 1.The workshop model as the primary method of instructional delivery in all content areas. 2.A focused component for STEM education in all grade levels with clearly defined resources and integration with the core curriculum 3.Technology infused instruction that allows teachers to use technology to deliver information and instruction and allows students to use technology to demonstrate understanding and mastery of content.

The workshop model will help students become proficient and avid readers, expressive writers, and critical thinkers. Students will have protected



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blocks of time for instruction and application. The educational program includes explicit instruction in all content areas utilizing research based curriculum resources aligned to the North Carolina Standard Course of Study and includes a technology enriched component for students to access a wide variety of text resources and demonstrate their learning. The lessons begin with a whole group mini-lesson and are front loaded with the learning objective. Anchor charts are utilized as a teaching tool and are developed by the students and teachers during the lesson. The anchor charts remain posted to serve as visual reference for the learners. During the "mini-lesson", teachers set the purpose for learning and scaffold for students throughout the lesson. Teachers will open the lesson with an explicit explanation of the expected student learning objective. After the mini-lesson, students are allowed to work in pairs or small groups as they delve deeper into content. These include "Think, Pair, Share, Buddy Reading/Writing, Independent reading/Writing, Side by Sides, Literacy and Math Stations etc. While students work in groups or pairs or at a learning station, the teacher is able to pull a small group for guided/direct instruction at the students instructional level. Instruction differentiated to meet the needs of each student. Students are given texts in a variety of genres that are at their independent and instructional level. They practice the strategies and objectives they just learned. During small group Workshop in all content areas, teachers will conference with students. While "conferring" the teacher will be able to meet the needs of student individually by assessing their understanding of content, re-teaching those who need additional support or alternative forms of engagement and challenge those students who are ready to either move on or "go deeper" into content mastery. If needed, flexible grouping in reading and math across a grade level (for outliers that are below grade level or outliers that are above grade level) or grade levels (for students that are above grade level) will be utilized to meet the needs of our high and low outliers so that students have a group of students to work and learn with at their instructional level. This also enables individual teachers to be able to provide quality differentiated small group instruction to ALL learners. The TCRWP is specifically designed to improve student achievement in Reading and Writing, which will ultimately improve all other areas of student performance. The connection between the Reading and Writing Project is designed to accelerate students' levels of achievement and to teach important skills such as deep comprehension, writing in a range of genres, problem solving, and close interpretative reading. We will replicate the workshop method to teach all of the expected NC Standards which require students to expand their critical thinking skills, enrich their understanding of content based vocabulary, and demonstrate their mastery of NC standards and STEM through a variety of means.

*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.*

In addition to participating in the NC Accountability model and Read to Achieve, we will implement a variety of assessments to accurately measure student achievement and readiness for promotion to each subsequent grade level. The School will participate in mClass K 3, Case 21, BOG Grade Reading for 3rd grade, EOC/EOG's, and internal benchmarks. The School will utilize these measures of student learning to create a true picture of each students independent mastery of reading and writing. The reading passages, anchor texts, and units of study including Science and Social Studies

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content to encourage a cross-curricular approach to teaching. The interdisciplinary curriculum model means that students are asked to transfer and build upon what is taught in one curriculum area while working in another area, and we believe this has enormous power to accelerate student learning. The interdisciplinary curriculum is all about application, transference, and assessment-based learning. We will supplement the math program with manipulatives, materials and assessments to measure student proficiency and growth in Math. The school will follow the NC grade level expectations for all subject areas to ensure that all students are prepared for each subsequent grade level. Although we intend to provide a very unique delivery model for instruction through the workshop model, the standards remain the same. All students will be required to meet the grade level expectations and will be measured on the NC Standards based report cards as published. Student learning will be demonstrated through the ongoing assessments in Reading, Science and Math as well as student projects and portfolios for Writing and the social sciences and foreign language in the middle school. K 8 rubrics designed for the STEM projects will assess if the student has met the grade level and project standards. Through peer critiques, students will assess projects. Students will learn how to be reflective and give meaningful feedback to each other. Students must be designated as meeting grade level expectations in the standards proposed in the new NC standards based report cards. Third grade students will participate in Read to Achieve and will have opportunities to meet the 3rd grade reading standards either through passing the NC BOG or EOG, mClass read assessments, the reading portfolio passages/assessments, or the Read to Achieve alternative assessment, when appropriate. Also, 3rd grade students will attend summer camp if they have not met the Read to Achieve guidelines/standards.

Students who are academically at-risk will be identified through the MTSS Team and placed in tier 2 of the MTSS plan. At-risk students will be placed on a Personalized Education Plan (PEP) and their progress will be documented based upon formal assessments and inventories. Students who fail to progress will then move to tier 3 for a more intense intervention. At the end of the year, students who are performing below grade level expectations will have a MTSS meeting to determine whether promotion criteria has been met with appropriate supports and assistance from the school. Students who are below grade level expectations according to the standards based report cards, who fail their required courses of study, and who fail the NCEOG's may be retained by the school. Students in the middle school may be offered course recovery in the summer through a virtual program so that they can be promoted to the next grade level, if appropriate. It is understood that all students exiting our school program in 8th grade must have completed all course and grade level requirements per NC Statute that enable them to register and enter 9th grade in any NC public school. The policy handbook includes language specific to transition and promotion for all students including EC and ELL students.

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

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*proposed mission and education plan.*

We will follow a calendar similar to the draft included which is closely aligned to the CMS operating calendar. SCSA will follow the posted holiday calendar for students and staff and have a slightly modified calendar for student attendance. Students will attend our school for 179 instructional days. Each school day will run approximately 7 hours with approximately 380 instructional minutes per day. In addition, we will offer an Extended Learning Program (ELP) for students identified as struggling or at-risk for failing to master their grade level expectations based upon benchmark data and formal assessments. The calendar includes 1075 core instructional hours for all students. The ELP will offer enrichments for the AIG students who elect to participate in local competitions, including Odyssey of the Mind, Science Olympiad, and other clubs. Certified teachers and trained staff will assist with scaffolding instruction and providing tutoring services as needed through a protected MTSS block within the school day and during the extended learning program (ELP). Field excursions will occur during the regular school day both on and off site at our local community partners who support our STEM focus. We will be offering an extension of the science program by hosting a summer program called "Camp Invention". Our proposed calendar also includes quarterly data chats for parents so the families can be well informed of their students' progress and either support or challenge them at home. All students will host quarterly data chats with their teacher serving as facilitator, thus taking ownership of their learning and progress. Finally, the calendar includes quarterly "presentation" dates for students to experience presentations from local experts in science, technology, engineering and math as well as to share their finished projects with their families and our community partners.

The operational calendar will include up to 21 days (year 1) for Professional Development and conferences to ensure that the staff has the proper training to implement our selected curricular resources, utilize the best instructional practices defined above and the interpret student data to refine and reform instructional pedagogy. Professional Development is the key to improving student learning. Therefore, we will focus on appropriate and sustained professional development from 3 primary sources:

1. Trained experts in Reading and Writing Workshop and Guided Reading to promote and develop our own experts in these areas.
2. Certified trained experts from Discovery Place via private training sessions, Education Studio and participation in STEM Fellows, and protovation.
3. Instructional Leadership and data-driven instruction based on the research of John Hattie and supported through the research of best practices from Charlotte Danielson.

Instructional personnel will report for 200 days year 1 and 195 days in the following years. This yearly calendar is included in Appendix C.

**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.*

All students will participate in district and state assessments, including; mClass Reading Assessments, Case 21, End of Grade Tests in Reading, Math,

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and Science, End of Course Tests. The School expects all students to work towards a higher level of proficiency on the end of year assessments, maintain within the expected achievement levels at or above grade levels of 3, 4, or 5; and/or Demonstrate more than one years growth within achievement levels as indicated by the developmental scale scores of assessments. The School will have an MTSS team to identify at-risk students through the NC Child Find program and a focused MTSS model with 3 Tiers for academics, attendance, and behavioral support for all students demonstrating need. At-risk students may include those below grade level expectations, those with frequent tardies or absences, those with exorbitant behavior referrals or those who demonstrate other symptoms of concerns. The goal of the school is to implement the MTSS model to assess and address their needs and to provide ongoing support as deemed appropriate. This Multi-Tiered Student System of Support model (MTSS) is a data-based framework for delivery that uses a multi-tiered approach to provide high-quality instruction and intervention matched to student needs and utilizes learning rates across time to inform important instructional decisions. The workshop model approach to instruction lends itself to differentiated instruction since reading, writing, and math instruction is conducted for whole group, as well as small group instruction at the students individual instructional level.

Tier 1: Core, Universal Instruction & Supports - General academic and behavior instruction and support provided to all students in all settings.

Tier 2: Targeted, Supplemental Interventions & Supports -More targeted instruction/intervention and supplemental support in addition to and aligned with the core academic and behavior curriculum.

Tier 3: Intensive, Individualized Interventions & Supports This is the most intense (increased time, narrowed focus, reduced group size) instruction and intervention based upon individual student need provided in addition to and aligned with Tier 1 & 2 academic and behavior instruction and supports.

All academically "at-risk" students will be placed on a Personalized Education Plan. The PEP will be maintained by the MTSS Team of teachers, parents, instructional leaders, and counselors, that convene to address the students need for additional support for students below level or failing to make gains. The PEP (appendix) will document all current levels of performance on assessments and will serve as a tool for ongoing progress monitoring. The master schedule is designed to provide protected instructional time in each core subject, with a minimum of uninterrupted 90 minutes for Reading/Language Arts and a secured time in the schedule for interventions and support. Teachers will incorporate the areas of deficiency stated in the PEP into their MTSS block. Teachers will be trained in MTSS in order to understand their responsibility to provide alternative forms of instruction, curriculum and assessment in order to remediate students and help them progress towards grade level proficiency. Teachers will have access to research based intervention materials and activities to provide interventions for content areas and social/behavioral needs. Behavioral interventions will be implemented for at-risk students whose behavior is negatively impacting their learning. Point cards, task cards, and behavior contracts will be used, as needed. The goal is to meet the needs of each student where they are and to support their development. Teachers will offer alternative forms of instruction and materials. Students who fail to make adequate progress will be recommended for further evaluation. (PEP to IEP recommendation form included in appendices).

## *2. Explain how the instructional plan and curriculum will meet the needs of English Language*

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*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.*

All students who complete a registration package in the school must complete a home language survey per NC-GCS-K-000 (16 NCAC 6D.0106). If the student's primary language is not English, the school will administer the WIDA-ACCESS Placement Test. Eligibility assessment on the Kindergarten W-APT for entering Kindergarteners and ACCESS for ELLs 2.0 Summative Assessment is used for 1st-12th grade and is based on results of the Home Language Survey (HLS) process. The HLS process, identification, and subsequent placement of limited English proficient students in English as a Second Language (ELL/ESL) services are guided at the state level by the NCDPI Curriculum and Instruction Division. A committee meeting will be held to enter the student into an approved ELL program which will be comprised of the parents, ELL liaison, and assigned homeroom teacher of record.

The school will employ specific instructional programs, such as Houghton Mifflin Harcourt's On Our Way to English curriculum and ACCESS English resources, practices, and strategies to ensure academic success and equitable access to the core academic program for our ELL students. An ELL endorsed staff member will provide instructional staff with strategies for meeting the additional needs of the student. Some of these approved methods for supporting instruction supported through LEARN NC are:

\*Provide alternative instruction whenever the class lessons are extremely difficult for the ELL student

\*Arrange small discussion and talking activities that permit students to practice verbal skills

\*Utilize additional techniques, such as cueing, modeling elicitation and chunking

\*Utilize graphic organizers such as webbing and semantic maps

\*Modify your lesson objectives according to the language level of the ELL student

\*Use manipulatives to help students visualize the math concepts

\*Allow students to use computational aids such as number lines, counters, and computation charts

We will provide equitable access to services needed, and ensure provisions and accommodations are made for the student. The workshop model approach to instruction with STEM learning and technology driven academics will naturally assist these students in any grade level (as outlined above when describing the MTSS model). Literacy support will be offered for these students and the core program will be inclusive of ELL appropriate tests that offer students a chance to demonstrate appropriate progress and growth as they move towards mastery of expectations. Plans for monitoring and evaluating the progress and success of ELL students (Kindergarten W-APT and ACCESS for ELLs 2.0 Summative Assessment) including exiting students from ELL service: The MTSS meetings as described for students failing to make academic progress will be used to monitor the progress of the ELL students. An ELL liaison will provide teachers with instructional strategies needed in the classroom to support the ELL and internal benchmark data will be disaggregated to determine learning gains and academic progress for these students. A PEP will be used to show the areas of success and growth that

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the student maintains. It further identifies the type of help needed to equip the student with the ability achieve high standards of proficiency and to comprehensively communicate in English. The ELL strategies will be documented in the teachers lesson plans and in the students Personalized Education Plan and ELL folder. The effectiveness of these ELL strategies will be determined by the teacher observations, student achievement and progress on EOG/EOC assessments, administrative walk-throughs, and fidelity checks from ELL resource teacher. ELL students who continue to make academic gains and show a minimum of "basic" performance levels on NC EOGs shall meet the criteria to begin exiting the student from the ELL program. The ELL Team shall convene with the parents to discuss exit plans and future support strategies for the student.

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

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

Academically or intellectually gifted (AIG) students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experiences or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both the intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.

Identification:

Initial criteria include superior academic achievement as demonstrated on EOG, EOC, mClass Reading Assessments, Case 21 scores. Teachers and parents of students identified as gifted candidates may also complete Renzulli checklists that identify academic and behavioral indicators for AIG students. The candidates who meet the criteria, will receive a gifted screening with parental consent (OLSAT). A certified, trained specialist will administer the test and the AIG Team composed of AIG certified teachers will analyze the results. Students who meet criteria will be recommended to our AIG program after having an initial "placement for services" meeting with our AIG Team and Differentiated Education Plan (DEP) will be developed to address that students individual needs. Our workshop model naturally lends itself to enrichment and differentiation at all of the highest levels of Bloom's Taxonomy. Students will have access to higher levels of fiction and non-fiction texts, technology infused instruction, small group instruction at their level in reading, writing, and math, and challenging STEM projects. Once identified, staffed and serviced, the AIG team will provide yearly evaluation meetings to review student progress, growth and goal achievement in similar fashion to IEP team meetings and update student DEP and goals each year.

In a review of research on gifted students in the regular classroom, Johnson and Ryser (1996) describe five overall areas for differentiation: modifying content, allowing for student preferences, altering the pace of instruction, creating a flexible classroom environment, and using specific instructional strategies. The Workshop model and STEM components are natural supports for

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an AIG student. They each allow students to "go deeper" into their instructional level. The following have been established as effective strategies:

- \* Posing open-ended questions that require higher-level thinking
- \* Modeling thinking strategies, such as decision-making and evaluation
- \* Accepting ideas and suggestions from students and expanding on them
- \* Facilitating original and independent problems and solutions
- \* Helping students identify rules, principles, and relationships
- \* Taking time to explain the nature of errors

The AIG Team will meet with the Gifted services provider, the parents and the students to set appropriate goals which may be academic, social or emotional at its core. All gifted students will have measurable goals to meet and demonstrate higherlevel/critical thinking skills, the opportunity for presentations of culminating projects and benchmark assessments of specific goals set for each individual child. Norm referenced and criterion referenced test data will be used to measure grade level performance progression and portfolios and authentic projects will be incorporated into their daily instruction to ensure that all gifted students stay engaged and on task. They will have opportunities for acceleration in placement, coursework, enrichments and resource time. A fully developed AIG plan will be board approved and submitted for final approval to NCDPI. This will be posted and shared to articulate the process and plan to all families.

### **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)*

We will provide a Free and Appropriate Public Education (FAPE), including special education and related services, to all children with disabilities pursuant to the North Carolina Public Schools Policies Governing Services for Children with Disabilities and federal special education guidelines and regulations. The school will also act in accordance with the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act (Section 504) and the Americans with Disabilities Act (ADA) with respect to students with disabilities. The school A transferring EC student is a student who was previously enrolled in another district or out-of-state

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public/charter school with an active individualized Education Program (IEP) and who is enrolling in the charter school. Upon notification that a transferring student is one with an active IEP, the school will review the existing IEP and implement the supports identified. Yearly meetings with the IEP Team will determine student progress and additional services required if indicated. The school is aware that exceptional children must be evaluated in accordance with NC 1503-3 through NC 1503-5. A student may not be given special instruction or services as an exceptional child until after he or she has been properly evaluated, identified, and placed in the manner prescribed by rules of the State Board of Education. The IEP Team for each child must include the parent, a regular education teacher, a special education teacher, a qualified representative of the LEA, and an individual that can interpret the instructional implications of evaluation results. Request for initial evaluation or determination of eligibility. Consistent with the consent requirements in NC 1503-1, either a parent of a child, or an LEA may initiate a request for an initial evaluation to determine if the child is a child with a disability. Upon an oral request for an initial evaluation from a parent, the LEA shall provide assistance, as needed, in completing a written referral. Timeline for initial referral: (1) Evaluations must be conducted, eligibility determined, and for an eligible child, the IEP developed, and placement completed within 90 days of receipt of a written referral; and (2) The IEP Team must determine (i) If the child is a child with a disability under NC 1500-2.4; and (ii) The educational needs of the child. The school will display posters and brochures throughout the school pertaining to Child Find as well as a link to child find on our school website. In additional, this will also help to satisfy the monitoring visit requirements. When a public agency, as defined at NC 1500-2.27, or parent suspects that a child may be a child with a disability, he/she shall provide in writing the reason for referral, addressing the specific presenting concerns and the child's current strengths and needs. Parents may request an evaluation in writing, with copies to the principal and the school's director or coordinator of special education. The School will communicate to parents their right to request an evaluation during parent information sessions, back to school nights and individual parent conferences. The EC Coordinator is required to maintain locked files and to monitor access. All files must be requested from the EC Coordinator and returned to her. On each individual E.C folder there is an Access to Records form that must be completed each time the identified personnel go into the file. Thus, keeping a running record of who views the files, why and when. EC Coordinator will share the IEP/504 at a Glance with teachers and recommendations for classroom modifications and accommodations for students who qualify. If files are removed from the filing cabinet for any reason (audit, review of files with parent, meeting, etc.), documentation will be kept and monitored. Specific language regarding Records requests (and forms), Record confidentiality and Compliance are in our policy handbooks.

### 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*



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*and*

*reported to the student, parents and relevant staff.*

4. *Describe the proposed plan for providing related services.*

The educational program of SCSA is designed to meet the needs of all students and improve academic achievement. Yearly goals include growth and proficiency for our EC students sub-group. To that end, we will implement a continuum of services to meet the needs of our students in the Least Restrictive Environment whenever possible.

Our EC team includes the EC facilitator, EC teachers, admin, general education staff and contracted service vendors as needed. The EC team will:

\*Review and evaluate cumulative and exceptional childrens folders of all students coming from another state to determine their eligibility status for exceptional student educational services. Services will be provided through contracts with an appropriate agency if necessary or a school staff member will be employed having the appropriate certificate in that exceptionality. The school will provide services to students whose needs can be met in the traditional classroom setting and with additional levels of support offered by certified EC staff. Speech and Language and OT/PT services would also be included for students in this category. These services will be contracted with outside agencies by the school. In providing for the educational needs of the exceptional student, the Principal, Exceptional Children teacher and the general education teacher will utilize the regular school facilities, which are physically designed and adapted to meet the needs of exceptional students as required by the Americans with Disabilities Act (ADA) and IDEA. The IEP Team will determine the least restrictive environment and proper placement within the full continuum of services offered for students with special needs. Appropriately licensed teachers will serve students meeting the eligibility criteria for special education in our educational program. The EC Team will determine a students eligibility for services based on the results of the evaluation/re-evaluation data. Placement of the student with disabilities services will be in the least restrictive environment. The EC Team will:

\*Make placement decisions and ensure that the individual instructional needs of the exceptional student are reflected in the students IEP

\*Review placement decisions annually at the IEP review meeting

\*Ensure accurate placement occurs for the student based on that students IEP and Free and Appropriate Public Education guidelines

We will provide students with the services and support they require based upon their IEP and ongoing progress monitoring. Teachers will be provided with additional support materials and training that is specialized and scaffolds the learning, such as Wilson Reading and Touch Math. We will support unique social/emotional needs of our students. The EC teachers will utilize various social stories and curriculum, such as Superflex. Furthermore, the general education and EC teachers will be trained in Responsive Classroom so that they can utilize Responsive Classroom techniques and strategies to support our EC students. Contracted personnel will provide the continuum of services and materials needed for Speech/Language, PT and OT as written in the IEP and appropriate. We will develop and oversee annual strategic plan for exceptional children services that includes (1) how students will be identified and evaluated for exceptionalities,

(2) the procedures for developing and implementing IEPs,

(3) How students with exceptionalities will be integrated in the school's

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instruction and culture, and (4) specific procedures and expectations for including parents and other stakeholders in the process of delivering special services.

Based on the enrollment of exceptional children, the school will hire and train the appropriate number of teachers/para-professionals, to ensure adherence to the Federal and state guidelines for class size and caseload, to ensure all necessary IEP services are being implemented.

Opportunities for in-service education regarding Least Restrictive Environment and working with mainstreamed/integrated exceptional students will be provided for school administrators, teachers, school staff, parents/guardians, students, and the community. These in-service workshops will be designed to promote a better understanding of the special education process and exceptional students. Teachers will be provided with appropriate accommodations and strategies for working with EC students. The school shall utilize this supplemental EC funding to provide for each exceptional students education needs. We will use a variety of assessments to determine the effectiveness of the program including district and state assessments, formal and in-formal assessments, and classroom performance. The IEP team considers the following factors in the development, review, and revision of the IEP:

a) Strengths of the student and concerns of the parents for enhancing the education of their child b) Results of the initial or most recent evaluation or reevaluation c) As appropriate, results of the student's performance on state or district-wide assessments d) Academic, developmental, and functional needs of the student Quarterly updates will monitor the students progress towards meeting the measurable annual goals as stated on the IEP. The goals include academic and functional goals designed to meet the student's needs that result from the student's disability to enable the student to be involved in and make progress in the general curriculum. As appropriate, the goals enable the student to participate in appropriate activities and meet each of the student's other educational needs that result from the student's disability. The school will develop procedures for updating, at least annually, the effectiveness of the individualized education programs in meeting the educational needs of special education students, including parent/family involvement in the evaluation process. Students eligible for special education and related services will be re-evaluated every three years or sooner if deemed necessary by the IEP team, in accordance with state and federal requirements. For accountability purposes, all students will participate in assessment procedures for students with disabilities. Appropriate accommodations will be in place based on the individual needs of each student to afford an accurate assessment. Accountability for the learning of all students is the cornerstone of the School. The North Carolina End-of-Grade (EOG) Test and Alternate Assessments are used to measure the achievement of individual student on the NCSCS. EC students are required to participate in state and district assessments for accountability purposes. The ESEA and the IDEA requires that students with disabilities participate in accountability measures and are provided access to the instructional support and resources their IEP requires. The selected curricular program includes materials and support for EC students who need alternative materials and assessments. All EC students will be measured for progress based on their IEP and under the auspices of the entire EC team. ALL students, including EC students will be exposed to grade level functional curriculum every year. Students will have the opportunity to work on grade level appropriate curriculum, but they will also be offered additional

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resources and supports at their individual functional levels. EC students will have additional supplemental curriculum available to help meet their needs and their current level of performance (below level texts, remedial math materials, intervention programs, manipulatives, etc.). We do not currently have children in need of modified standards. When the need arises, students will be entitled to extended content standards. Students with those modified standards would be exempt from gen ed promotion standards.

## **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.*

Steele Creek STEM Academy will comply with the North Carolina Accountability Model including all BOG EOG, EOC and Read to Achieve tests. We will implement an educational and assessment program that combines successful, standards-based instructional practices with ongoing bench marking assessments. The School expects to enroll students from 5 or 6 neighboring schools with average School Performance Grades (SPG) ranging from 40-65 and therefore understands that laser-like focus will be needed to meet each child where they are and set appropriate growth goals. These are included in a table format in the appendices. SCSA will strive to become a B graded school within 3 years by examining student performance data and addressing areas of deficiencies in each content area and grade level. Teachers will work together in vertical planning sessions to review student performance data and level set expectations and improvement plans.

In addition to using the standardized NC exams, the School will use additional bench marking assessments such as MClass, TE 21 and IReady as appropriate to measure student progress and mastery. The School's priority is to push student growth individually and collectively through focused, data driven instruction, differentiation and careful attention paid to individual student needs.

SCSA will also administer classroom assessments that include: spelling inventories, running records, close read, explicit writing rubrics, and assessments for STEM learning provided by Discovery Place, Go Math, STEMScopes and Engineering is Elementary. The assessment tools are used to analyze student performance on school-based curriculum and mission that are aligned to benchmarks within the Standard Course of Study. The result is a balanced approach to assessment that combines the benefits of state, district and school-wide assessments with the instructional value of day-to-

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day classroom assessments and assignments.

By identifying the state-specific standards that students must master in order to move to the next grade level teachers will determine what students should know and be able to do to demonstrate proficiency on high-stakes assessments, as well as, in the foundational skills and understanding necessary for success in future grade levels. SCSA will implement a continuous model to measure academic progress and to measure instructional effectiveness and teacher capacity. The data-driven cycle of assessment, analysis, and action, based on Hattie's research, is part of the school's culture and is the top priority for school-wide improvement. Leadership and teachers will begin to identify/implement additional strategies to use for closing the gaps and promoting growth by utilizing the MOSL from TCRWP as well as other formal assessments to identify the following:

- \*What is the present level of proficiency (each student)

- \*What should the present level of proficiency be

- \*What can teachers do to close the gap? Implementation of NC model of MTSS

- \*Identify students who need additional instructional support and increase the 1:1 and small group instructional time for those students.

- \*Use varied, effective strategies to instruct diverse learners and to assess content understanding and mastery levels

- \*Use test and other information on students' performance in instructional planning

#### Promotion Requirements

Students are required to meet promotion standards in grades K-8 that include demonstrated grade

level proficiency on local assessments, standardized tests, report cards, and student work. In

determining the best educational interests of a student, appropriate grade placement decisions

shall be based upon the mastery of critical knowledge and skills including reading and

mathematics.

The educational program shall provide for the continuous progress of students.

In order to be promoted to the next grade levels, students in all grades should be proficient in

reading and mathematics, which may be demonstrated through North Carolina End-of-Grade

tests, school assessments, student portfolio of work, and report card grades. A promotion

decision should not be made solely on the basis of a state assessment.

Parents will receive quarterly report cards and progress reports as well as data reports from benchmark assessments. Parent conferences will provide

face to face conversations related to student progress. Additional parent meetings will be held related to EC and ELL student progress.

If a student appears likely to be retained, then the parent/guardian of the student shall receive at

least two (2) notices. The first notice may be a conference; the second notice must be in writing

and must be provided by the end of the third quarter. The principals office must provide in

writing an official notice of retention to the parent/guardian by the last day of school.

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Students with Disabilities and Limited English Proficiency Students  
Students with disabilities who do not have the ability to participate in the Common Core State Standards and North Carolina Essential Standards may be exempt from the promotion standard;

however, exempt students must be enrolled in a functional curriculum and demonstrate evidence of progress on alternate assessments.

All recommendations regarding special needs students will be made in conjunction with the IEP

Committee or the Section 504 Committee.

Students of Limited English Proficiency (LEP) as identified by state and federal standards shall

meet the same standards as all students; however, in accordance with federal law, English

language proficiency cannot be the factor that determines whether a student has not met

performance standards. All retention recommendations regarding Limited English Proficient

students should be made in consultation with the English as a Second Language teacher.

Samples of standards based report cards, PEP for at-risk students and IEP at a Glance docs are included in \board approved policies.

### **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.*

SCSA believes in a Positive Behavior Support plan which will be implemented through training in Responsive Classroom Model. A student/parent handbook which details offenses which may lead to suspension or expulsion and student rights is included in the appendices. The Responsive Classroom detailed below is purposefully selected to create a climate and culture on campus that mitigates negative behavior and creates a culture of respect and empathy. All classes will begin their school day with a Morning Meeting based on the Responsive Classroom model. Morning Meetings are an important element in creating the nurturing, safe, familial environment that is so important to our program.

Morning meetings will include the following:

\*Greeting Elementary school students need to feel acknowledged and vital to

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the group.

\*Sharing Ethical issues, world events, community issues, and personal triumphs need to be shared, discussed, and processed.

\*Team Building Such activities provide opportunities for camaraderie while breaking down barriers and fostering trust among a diverse group of students.

\*News and Announcements Information about schedule changes, approaching deadlines, and daily events allow students to begin their academic day centered and informed.

\*Goal setting

The K-8 teachers and staff will receive Responsive Classroom for Elementary and Middle School professional development. They will spend time with our students learning the rules and routines and creating a respectful and kind classroom/school climate and culture to ensure that everyone can learn and that the classroom operates safely and efficiently. They will utilize the book *The First Six Weeks of School* by Roxann Kriete to facilitate the learning of the classroom guidelines, routines and processes. The teachers and students will model and practice all of the classroom routines so that when it is time for students to break into their guided reading and math groups, students are able to independently work and navigate the classroom while the teacher works with small groups. This is key to a workshop model working effectively.

We will serve all students and implement a Positive Behavior Plan which includes interventions and behavioral support. With respect to the services provided to our student population and staff, no person shall be discriminated against in any education program, activity or other related service based on race, color, religion, gender, sex, age, national origin or disability. SCSA will implement the discipline plan to support its mission of academic and social development for all students by providing an escalating consequence program that seeks to remediate and change negative behavior, not just "punish" it. Students and parents will sign a declaration page that states they have read, understood, and agree to adhere to the behavioral expectations of the student code of conduct.

A copy of our Behavior Chart and draft discipline policies are included which identify specific infractions and consequences as well as a formal grievance procedure.

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<b>Section III: Education Plan Concerns and Additional Questions</b>		
Applicant shows a detailed STEM approach in this explanation.	Heather Soja	Instructiona
Does the school have evidence that these kinds of strategies are not currently being used in the LEA?	Kenneth Tucker	Instructiona
These strategies are great. What is the evidence to support that most of these same strategies are not being implemented in the traditional public schools in the same geographic region? Can you present evidence otherwise, and is that evidence compelling enough that a new school is warranted?	Arasi Adkins	Curriculum a
How will you ensure the AIG program and students identified in Tier 2 & 3 MTSS are not racially segregated?		
Elaborate and clarify how all of your target populations needs will be met; ELL, EC, AIG, etc.	Jessica Kelly	Curriculum a
Are these same strategies used at other school already and have you found successful?		
Is there a specific curriculum you will use in support of your STEM instruction?	Les Stein	Curriculum a
These are the same exact strategies used in traditional public schools. What makes this charter school different?	Arasi Adkins	Special Prog
Well done in the alignment with mission.	Heather Soja	Special Prog
Who will be responsible for the AIG program?	Les Stein	Special Prog
Is there a missing or extra word in this sentence? (The school A transferring EC student is a student ...). What is the meaning f this sentence fragment? (Request for initial evaluation or determination of eligibility.).	Robert McOuat	Exceptional
These are the same exact strategies used in traditional public schools. Why is there a need for a charter school?	Arasi Adkins	Exceptional
Does the school make the choice to waive electives to give additional remediation or is that a joint decision with parents?	Shannon Stein	Student Perf

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Tammi Sutton	
Cheryl Turner	
Kenneth Tucker	Pass
Steven Walker	Fail
Deanna Townsend-Smith	
Heather Soja	
Arasi Adkins	Pass
Sherry Reeves	Pass
Shannon Stein	Pass
Robert McOuat	
Phyllis Gibbs	
Lynn Kroeger	Pass
Les Stein	Pass
Lindalyn Kakadelis	Pass
Joe Maimone	Pass
Jessica Kelly	Pass
Alan Hawkes	

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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:* Alliance Preparatory Schools, Inc

*Mailing Address:* 9142 Browne Rd Charlotte NC, 28269

*City/State/Zip:* Charlotte NC 28269

*Street Address:* 9142 Browne Rd

*Phone:* 980-288-4811

*Fax:* 888-799-3166

*Name of registered agent and address:* US Corporation agents, Inc. 101 N. Brand blvd Glendale CA 91203

*FEDERAL TAX ID:* 46-4207477

**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:

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

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

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

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

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

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



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Nixon		G			
Christy Condon	Secretary	MECKLENBURG	Educator		
Jose Garcia	Chair	MECKLENBURG	Assistant Principal		
Vishi Cook	Treasurer	MECKLENBURG	Project Manager		
Tyrone Harmon	Member	MECKLENBURG	Developer		
Shelly Domenec	Vice Chair	MECKLENBURG	Business Owner		

**Please provide the following in this location of the APPLICATION:**

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

A North Carolina Not-for-Profit Corporation has been established for sole and exclusive purpose to establish and operate a Charter School under the Charter School Act of 1996, as codified in North Carolina Statutes 115C-238.29A et seq. All business and affairs shall be managed by a volunteer Board of Directors, or by such committees as the Board of Directors may establish to accomplish the goals of the school and its programs. Directors will be required to demonstrate commitment to the mission and purpose of Steele Creek STEM Academy, and will be required to attend regular meetings and accept committee memberships. Such committees shall have such responsibilities as the Board of Directors shall specify. Committees may include, but are not limited to: Finance, Personnel, Facility, Curriculum, Exclusion or others as needed. The Board will bear final responsibility for the schools academic success, organizational viability, and faithfulness to the terms of the charter by developing and approving the annual budget in addition to school policies. It will set goals and review strategy to continually guide the school towards the fulfillment of its mission. The board shall perform a national search utilizing a wide array of established educational leadership job posting sites, and will hire the founding principal with the following characteristics at a minimum:

- Masters Degree in Educational Leadership or equivalent
- Professional Educators Certificate in Educational Leadership or Equivalent
- Minimum three years prior experience as a principal of a charter school
- Verifiable and quantifiable evidence of ensuring student academic success
- Prior experience as a start-up school leader

The Board of Directors will supervise the school principal via a continuous improvement and reflective leadership process consisting of data review of the following:

- Academic benchmark and end of course/grade data
- Financial data including monthly budget versus actual, cash flow, enrollment and financial audits
- Stakeholder data including annual parent, staff, student surveys, staff and student attrition data
- Strategic planning toward achievement of the schools short term and long term goals.

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*

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*governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The Board of Directors currently consists of six and may include up to a maximum of nine members. Directors shall serve for terms of three years, or until their successors assume office. The powers of the Board are comprehensive in scope, designed to effectively operate the charter school, and are detailed in the bylaws. Duties of the board are to attend scheduled meetings, contribute through expertise and service, and vote on matters related to school, in the best interest of the school and in support of the schools mission and purpose. The Boards officers minimally consist of a Chairperson, Vice Chairperson, Secretary, Treasurer and such other offices as deemed appropriate by the Board of Directors. Designated officers shall have such authority to perform duties as sanctioned by the Board of Directors, in addition to specific responsibilities outlined in the bylaws. These officers shall be elected by majority vote of the Board of Directors. The current skills and expertise represented by the Board are purposefully requisite to the needs of Steele Creek STEM Academy: expertise in education, specifically both regular public and charter school, local and national business expertise, financial expertise, and construction expertise. Additionally, professional educators serve as a preponderance of the Board, a majority of the Board are parents of school age children, and all Board members are local residents with a deep and pervasive connection to the local community. The structure and composition of the Board will ensure success of the school by combining a well-established governance model evidenced by the highly successful charter school they govern, utilizing talented local stakeholders with not only a vested interest in local educational choice, but verifiable experience in opening and operating highly successful charter schools. The success of the school will be evaluated through systematic review of the schools goals through an annualized school improvement process, state academic data collected via the READY accountability model, compliance checks from the state and successful financial audits. The principal will be evaluated utilizing the evaluation process for school leaders found within the NC Educator Evaluation System (NCEES).

*3. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?*

The initial founding board in 2013 was recruited by a grassroots effort targeted toward attracting an active group of community members which together provide the necessary balance of educational background, parent support, business acumen and local experience necessary to open and operate a highly successful heterogeneously populated charter school. Interested candidates attended an informational meeting hosted by the original founding board member, and chose to serve in support of the schools mission and purpose. Board seats have staggered terms such that 1/3 of the positions expire each year, to allow for consistency in board operations while at the same time allowing for the composition of the board to thoughtfully evolve in parallel to the school. New board members shall be elected by a majority vote of the current Board of Directors members, or by such committees as the Board of Directors may establish pursuant to the bylaws. Vacancies occurring due to events outside of the

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natural term expiration will be filled as quickly as possible with qualified candidates as identified and approved pursuant to the bylaws, and any replacement member will continue the term of the previous board member as to preserve imposed staggered term limits.

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

The board shall meet no fewer than ten times per year, and shall conventionally meet once per month: including the annual meeting in June, a school readiness meeting in August, and mandatory monthly meetings during the school year. The board will schedule additional meetings as needed.

5. *What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.*

The staggered term limits imposed via the bylaws ensure that there remains a consistent number of inveterate Board members who can provide guidance and leadership to new members of the Board. Each new member shall receive a Board Book which will include: a copy of the charter application, charter contract, North Carolina School Board Association Governance Standards, bylaws, school policies and procedures, budget, prior year financial audit, conflict of interest policy and prior year board minutes. At the first meeting following a new member joining the board, new member orientation training will be conducted by the Board Chair. This training will explain all items within the Board Book, and articulate how the documents are used in the discharge of duties as a member of the Board. In addition to new member orientation, the Board will undergo at least six hours of professional development, in one hour modules at each board meeting, in the following areas: Charter School Legal and Legislative Updates, Financial Policy and Oversight, Data Driven Decision Making, School Improvement Planning, Instructional Leadership, and Effective Governance. All board members are required to attend the trainings, or otherwise acquire the information after the board meeting, and pass an assessment after each module which demonstrates understanding of the curriculum.

6. *Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.*

The Board of Directors will accept only the highest standards of ethical and moral conduct from its Members and the school staff. Due to the important role played by the Board, all Directors undergo the same background check procedures as employees of the school, and will conduct themselves in accordance with the North Carolina School Boards Association(NCSBA)standards. A Director may be removed with or without cause only by a simple majority vote of the Board of Directors at any meeting. Directors will be considered for dismissal for any one the following breaches of integrity, including violation of confidentiality, undermining the directives of the Board, being indicted or convicted of a felony, failing to oversee and abide by terms and conditions stated in the bylaws, or by acts that would constitute a general breach of integrity in the views of the members of the Board of Directors. Matters that come before the Board of Directors which places a Director in a perceived conflict of interest between the interests of the Corporation of the Board member, his/her family, and/or business, the Director with the conflict shall be prohibited from participating in the discussion and recuse his/herself from voting on

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the particular matter in the event the Board upon review of the potential conflict of interest deems that a conflict in fact has or will occur. The Board of Directors shall comply with the voting and disclosure provisions of Director Conflict of Interest Section of the Non-Profit Corporation Law NCGS 55A-8-31. Article XII of the bylaws details specific and comprehensive measures the Board adopts to proactively avoid actual conflicts, including the requirement that all Board of Directors sign an annual statement that he/she:

1 has received a copy of the conflicts of interest policy

2 has read and understands the policy,

3 has agreed to comply with the policy, and

4 understand that the Corporation is a charitable organization and that in order to maintain its federal tax exemption, it must engage primarily in activities which accomplish one or more of its tax-exempt purposes. The bylaws also include a due process by which a perceived conflict may be investigated fully in order to decide if a legitimate conflict exists, and empowers the Board to act in a decisive manner to correct the conflict should one exist. As of the submission of the charter application, the Board of Directors has signed the annual statement so that no perceived or real conflicts exist, or will arise should the Steele Creek STEM charter application be approved.

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

Guided by the schools mission, the board will set policies regarding finances, enrollment, program evaluation, and other operational aspects. The boards policies will have two purposes: to provide direction to the school staff in implementing the schools goals, and to ensure the school meets legal requirements and obligations of the charter contract. The board may also adopt policies throughout the year to address situations and crises. To adopt proven practices and avoid adopting unsound or illegal policies, the board may research policies established at other charter schools in the county and state. Guided by existing research and established best practice, the board may also seek legal consultation when developing policy. Both the board and school leadership will adopt the "School Improvement Life Cycle" as published by AdvancED/SACS, to guide all decision-making processes and particularly those that involve school policy. The cycle begins and ends with the gathering and thoughtful analysis of relevant school data. Goals will be established for school policies that match a SMART format (Specific, Measurable, Achievable, Relevant and Time-Bound). The board will implement the policies in furtherance of the schools mission, and will evaluate the impact and relative effectiveness of the policies, thus renewing the cycle of continuous improvement. Furthermore, the school will undergo AdvancED accreditation in its third year of operation to provide external review and feedback to the schools programs and decision-making process.

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

There are two main advisory groups who serve critical roles within the organizational structure of Steele Creek STEM Academy: the School Advisory Council (SAC) and the Parent-Teacher Organization (PTO). The School Advisory Council is responsible for the development and review of the School Improvement Plan, in addition to other roles and duties assigned to it by the Steele Creek Board of Directors. Given the importance of the School Improvement Plan as the document which will both guide and evaluate the school's programs, both the Principal and the Board Chair will serve as

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adhoc members of the SAC. The remaining composition of the SAC will consist of parents, staff, community members and, when appropriate, students. To ensure that parents and the local community have the largest voice in the school improvement process, at least 51% of the SAC will be comprised of non-school staff. The Parent-Teacher Organizations role in the school is responsive in nature, therefore the PTO will evolve to meet different needs as the school grows and becomes more established. In the initial years, the PTO will help to establish a positive school culture, broaden the base of volunteers, and increase school-to-home and home-to-school communication. As the school becomes established, the PTO will transition toward increasing vibrancy to the school programs through development of social and community service opportunities for the school. The membership of the PTO will be free of charge to any and all school community members in the first two years of the school. An executive committee will be established in the first year of the school to provide leadership and direction to the PTO. The Principal as well as an active Governing Board member will serve on the PTO executive committee in order to ensure continuity of the schools mission and purpose as realized in the decisions, actions and events that arise from the PTO.

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

Parents or Staff who have a grievance at Steele Creek STEM Academy will use the following procedure in order to solve issues with other interested parties. Grievances will be resolved promptly, equitably and in the educational best interests of children. This policy is not intended to replace other professional, informal discussion and resolution of issues as they may arise. The Aggrieved Party will raise the grievance with the lowest-level appropriate member of the faculty or staff via written note or email, and the staff member will then seek to resolve the issue. The faculty or staff member may involve other, higher-level members of the school staff. Staff will endeavor to resolve issues at this level within 3 school days of initiation of this grievance. If the problem persists and cannot be solved at the staff level, the Aggrieved Party can appeal to the appropriate school leadership team member. School leadership will endeavor to resolve issues at this level within 3 school days of initiation of this next step. If the grievance is not satisfactorily resolved by School Leadership, the grievance may be submitted to the Board Chair in writing for mediation. The Board will review and their decision will be final. Resolution at this level will occur by the next regularly scheduled Board meeting, unless that Board meeting is less than 3 school days after reporting at this level. The only student disciplinary matters that may be appealed to the Board are those taken under N.C. Gen. Stat. 115C-390.7, 115C-390.10, or 115C-390.11. Recommendations from the Principal to exclude a student from the School can also be heard by the Board.

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

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix E)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).
3. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a

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*stated commitment to the NC Open Meetings Law (Appendix G).*

- 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.

Teachers-Elementary 24.00

Teachers-Middle 3.00

Teachers Arts/STEM/Music 3.00

Teachers PE 2.00

Teacher Assistant 4.00

EC Teacher 3.00

EC Teacher Assistant 1.00

Salary STEM elective 1.00

Salary - Principal 1.00

Assistant Principal 1.00

Office 2.00

Business Manager 1.00

Salary - Registrar 1.00

Salary - Technology 1.00 Maintenance/Cafeteria 2.00

Nurse/Health Officer 1.00

Guidance 1.00

After School Coord 1.00

P/T teachers (aftercare)3.00 Bus Drivers 2.00

Substitutes as needed

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

Include the following information for the proposed charter school:

The Board is committed to ensuring that its leaders have strong interpersonal skills to promote professional growth among the instructional

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staff. This school culture of excellence results in recruiting effective teachers and maintaining high retention rates and high academic performance. The School principal will active advertisements on targeted social media, word of mouth recruitment and partnerships with local universities to assign interns to the school who will be considered for possible future openings that may arise based on their performance. Most importantly, the school has developed two integral partnerships that will help recruit and retain high performing teachers. The partnerships secured with Teachers College of Columbia and Discovery Place will help serve as initial recruiting efforts for staff expected to implement the workshop model of instruction and a STEM based curriculum. Instructional openings will also be posted online through Indd.com and the NC Jobs site. Relationships with partner schools will help recruit high quality teachers committed to the SCSA mission. Candidates selected for hire will be given a thorough explanation of the school's educational program, expected climate and culture, performance objectives and the operational calendar.

The Governing Board believes the retention of high performing staff is based on relationships developed and benefits provided. The Governing Board wants to ensure its employees are provided with competitive benefits, raises and employee services, within the Schools financial parameters and responsibilities. Climate surveys will help identify employee satisfaction and areas in need as will feedback tools in the NCEES process. Experience and research dictates that when the employees have a good benefit package and a positive working relationship with their supervisors the environment is conducive to effective teaching and learning and retention of desirable staff.

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

The School will be a not-for-profit, at-will, private employer and will not participate in the NC Retirement System. The employees will be employed by the school under the purview of the Governing Board. The Board will hire the Principal and the Principal will recommend for hire all subordinate staff. The School will provide a competitive compensation plan to attract and retain good, loyal and committed employees. The Board will promote a healthy, productive work environment that rewards creativity and performance.

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

School is an equal opportunity employer and will not discriminate against any applicant, contractor or employee on the basis of age, race, color, religion, sex, national origin, veteran status, disability, genetic information or other legally protected status, except where it is an occupational qualification. This policy extends to all terms, conditions and privileges of employment as well as the use of the schools facilities and participation in all activities sponsored by the school. It is also Schools policy to ensure that all employees are treated equally on the basis of merit and performance competence with regard to any and all terms of conditions of employment, including recruitment, hiring, compensation, promotions, demotions, assignments, trainings, layoffs, and terminations.

According to NC Charter School law GS\_115C-238.29F (e) (1), all NC Charter Schools shall adopt a background check policy mirroring the local board of education policy that requires an applicant for employment to be checked for

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a criminal history, as defined in G.S. 115C-332. School is required to apply its policy uniformly in requiring applicants for employment to be checked for a criminal history before the applicant is given an unconditional job offer. According to NC charter School law, a charter School may employ an applicant conditionally while the board is checking the person's criminal history and making a decision based on the results of the check.

Employment with the School is based on mutual consent; both the employee and the School have the right to terminate employment at any time, with or without notice, for any lawful reason, or for no reason at all. The most common circumstances under which employment is terminated include resignation, discharge, reduction-in-force, or retirement. The full hiring policy/procedure is included in the handbooks.

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

The board recognizes that in order to attract and retain qualified, effective school staff members, that both the salary and benefits offered to staff must be competitive with the existing market. As evidenced in the schools budget, the average salary for all instructional staff is \$42,000 per year.

The School expects to hire a range of instructional staff with a wide range of experience, and will adjust the budget accordingly. School Leadership salaries also reflect local market rates as well. Non-instructional staff has been budgeted to include a range of \$14-15 dollars per hour for front office and custodial staff, which is the competitive market rate. For other specialized non- instructional 12 month staff such as the Business Manager, the board will be seeking Bachelors Degree or higher candidates for these 12 month positions, and have created salary schedules as proposed in the budget to confer salaries within the current market that are competitive. The school will offer health insurance through the North Carolina State Health Plan and to all employees who work an average of 30 hours per week or more. Additionally, dental, vision insurance, disability, and life insurance will be offered to employees at market rates and to those who qualify according to applicable state and federal law. A 403(b) tax-advantaged retirement plan with an employer match of 100% of up to 3% of the employees contribution will be offered to all employees through a licensed, reputable vendor. Paid Time Off (PTO) will also be offered to full time employees, up to 10 equivalent work days per year. Vacation time will be offered to 12 month full time employees, and will be negotiated individually per position. A PTO policy has been included in the appendices.

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

Employment with the School is based on mutual consent; both the employee and the School have the right to terminate employment at any time, with or without notice, for any lawful reason, or for no reason at all. The most common circumstances under which employment is terminated include resignation, discharge, reduction-in-force, or retirement. No provision in this handbook or any other personnel policy or procedure document shall be construed to the contrary or construed to limit this right in any way.

1. The grievance process is as follows:

Step 1: To file a grievance, an employee must submit a letter in writing to the Principal of the School. If the Principal of the School is implicated



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in the grievance, the grievance should be submitted to the Chair or Vice Chair of the Board.

Step 2: The Principal of the School shall have up to five business days from the time they receive the formal grievance to respond to the grievance in writing. The employee shall submit their satisfaction to the Principal in written form.

Step 3: If the employee is not satisfied with the response the employee may file an appeal by submitting a letter in writing to the Board. This must be done within 5 business days of the initial response from the Principal.

Step 4: The appeal shall be considered by the Board at its next regularly scheduled monthly meeting, provided such meeting is more than seven days after the filing, or the Chair of the Board or Principal s may call a special meeting of the Board to consider the appeal in accordance with the Schools bylaws. The Board will consider and discuss the grievance at the meeting in accordance with Open Meetings laws. Any decision of the Board will be communicated to the individual who filed the grievance within five school days. The Boards decision concerning the grievance is final.

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

It is possible that custodial, office and early/after care staff may have dual responsibilities by assisting in the breakfast and lunch service during the school day. The staff will be funded through the regular operating budget and the school will receive no net revenue from the school lunch program. There are no additional positions inside or outside of the organization that will have dual responsibilities.

*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.*

SCSA will have at least one staff person certified in EC, ELL, and AIG in anticipation of serving these students prior to the school opening. The Principal and Registrar will review completed enrollment packages with SCSA leadership to identify all supplemental staffing needs based upon student population enrollment data. As the school opens, data collected from cum files, home language surveys and Student Search measures will help the school quantify the number of additional certified staff needed to provide the appropriate support services and materials for these student populations. The school will continue to hire appropriate numbers of certified staff as students who enroll and are entered into EC, AIG or ELL programs. This will be an ongoing process to ensure the needs of all students are met and provided a continuum of services required by their IEP, EP and ELL status. The School will contract for additional services such as Speech, PT and OT etc. The budget tool reflects same.

*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).*

Below is a list of primary roles, responsibilities and qualifications for integral staff positions. Complete job descriptions are available in the Policies and Handbooks. School is required by the state of North Carolina to conduct criminal background checks for all staff including full-time, part-time and substitutes, which will be done upon the acceptance of a conditional employment offer. A criminal records check may also be

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conducted on a selective, random or rotating basis for any current employees, annually rehired employees, and employees whose contracts are scheduled to be renewed.

Principal: Ed Leadership, Certification, MS Educational Leadership, 3-5 years classroom experience required

- \* Establishes and maintains a safe and effective learning environment in the school.

- \* Initiates, designs, and implements programs to meet specific needs of the school.

- \* Assists in the management of the school budget.

- \* Enforces district and corporate policies and procedures.

- \* Maintains active relationships with parents and students.

- \* Budgets school time to provide for efficient conduct of school instruction and business.

- \* Schedules classes within established guidelines to meet student needs.

- \* Meets and instructs assigned classes in the locations and at the times designated.

- \* Plans a program of study that, as much as possible, meets the individual needs, interests and abilities of the students.

- \* Creates a classroom environment that is conducive to learning and appropriate to the maturity of the students.

- \* Prepares classes for the classes assigned and shows written evidence of preparation upon request.

- \* Encourages students to set and maintain standards of classroom behavior.

- \* Guides the learning process toward the achievement of curriculum goals and in harmony with the goals, establishes clear objectives for all lessons, units and projects to communicate these objectives to students.

- \* Employs a variety of instructional techniques and instructional media, consistent with physical limitations of the location provided and the needs and capabilities of the students involved.

- \* Strives to implement by instruction and action the schools philosophy of education and instructional goals and objectives.

Assistant Principal: Bachelors in Education, Certificate/Licensure and a minimum of 3 years classroom instruction required

- \* Act as Administrator in charge in absence of Principal

- \* Serve as LEA as needed in EC/ELL/AIG/MTSS meetings

- \* Share with the principal the responsibility for protecting the health and welfare of students.

- \* Oversees all matters of student attendance and compliance

- \* Resolves all discipline problems in a fair and just manner and maintains records of any discipline action taken.

- \* Assists in administering practices dealing with campus control and security.

- \* Serves on the MTSS team; Assists with grade level data chats and updates data walls/boards and identifies areas of need

- \* Has a general supervisory responsibility for student activities, athletic events, programs of student orientation, and similar activities during school hours.

- \* Assists in assigning faculty to supervision of co-curricular activities.

- \* Meets with department heads and/or leadership team to insure compliance with standards

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- \* Works with the test coordinator in the administration of achievement tests
- \* Works closely with Principal/Guidance Counselor and Testing Coordinator on master schedule

EC (AIG/ELL) Facilitator: MS in Exceptional Student Education, ELL/AIG endorsement, Staffing/IEP experience required

- \* Supervise EC teachers, Classroom Teachers of EC students, contracted vendors and EC students
- \* Coordinate Testing and Evaluations
- \* Maintain compliance in all IEP cum folders and online platform
- \* Ensure compliance with all IEP accommodations
- \* Attend and facilitate all EC/Staffing/Evaluations/MTSS meetings
- \* Submission and maintenance of EC Grants and expenditures

Teachers: Bachelor of Arts/Science in Education or field of instruction, Certification/license)

- \* Meets and instructs assigned classes in the locations and at the times designated.
- \* Plans a program of study that, as much as possible, meets the individual needs, interests and abilities of the students.
- \* Creates a classroom environment that is conducive to learning and appropriate to the maturity of the students.
- \* Prepares classes for the classes assigned and shows written evidence of preparation upon request.
- \* Encourages students to set and maintain standards of classroom behavior.
- \* Guides the learning process toward the achievement of curriculum goals and in harmony with the goals, establishes clear objectives for all lessons, units and projects to communicate these objectives to students.
- \* Employs a variety of instructional techniques and instructional media, consistent with physical limitations of the location provided and the needs and capabilities of the students involved.
- \* Strives to implement by instruction and action the schools philosophy of education and instructional goals and objectives.
- \* Makes provisions for being available to students and parents for education related purposes outside the instructional day when required or requested to do so under reasonable terms
- \* Plans and supervises purposeful assignments for paraprofessionals and volunteers.
- \* Strives to maintain and improve professional competence.
- \* Attends meetings and serves on staff committees as required.

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

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

The Principal will work directly with a licensure director to ensure that all staff are appropriately licensed, have documented professional development opportunities and maintain active NC certification. These reports will be maintained in SAR.

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*

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*licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

The No Child Left Behind Act of 2001 simplifies the process of identifying and hiring "highly qualified" teachers. Steele Creek STEM Academy provides procedural guidelines and support that enhances the likelihood of recruiting highly effective staff. SCSA is designed to improve student learning and academic achievement of all students enrolled in the school. The Board understands that in order to promote superior academic achievement, they must build instructional capacity of the staff. The School will implement the NCEES tool for staff evaluations, observations and feedback. The School has developed a Licensure Plan and BT Plan that outlines and meets the required formal and informal evaluation expectations.

SCSA will implement a purposeful BT mentor program for new teachers and provide ongoing support for all staff as they learn the new instructional model for delivery and become comfortable with STEM instruction. Initial professional development will be uniform for all staff in the workshop model and STEM integration. Ongoing training and professional development will be individualized, tailored to the specific needs of each teacher based upon student growth data, leadership feedback, and personal reflections in their personal development plans. The professional development provided by Education Studio of Discovery Place, Teachers College of Columbia and vendor based training will provide teachers with the CEU's necessary to qualify teachers for NC licenses and re-certification. The School will implement Board approved BT and licensure plans.

All staff will be evaluated through a variety of measures. The school will use the NCEES and EVAAS program to document mentor programs, PD participation and formal observations as well as to measure student academic growth. The School will also utilize the research based evaluation tools developed by Charlotte Danielson and aligned to the educational program of MCSA to measure teachers' effectiveness in perspective of the unique educational program.

At the end of school year, staff will have comprehensive evaluation meetings with leadership to review their performance, student growth, and a value-added component that measures their value to their team, grade level and the school at large. Teachers will have the opportunity for salary raises and

bonuses in a merit pay system. All returning staff will participate in some amount of yearly increases which may be tied to state/local allotments, but the highest performing teachers may qualify to receive higher salary increases or bonuses. Stipends will also be paid to teachers who offer their expertise in the extended learning program (ELP) and serve as team leaders, coaches, committee chairs etc.

The goal for the Board is to recruit, train and retain a premier staff of highly qualified instructors dedicated to the mission of MCSA to improve academic performance.

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

Professional Development is critical to ensure success of the school mission. The Board will provide a variety of professional development opportunities for the instructional staff through our business partnerships,

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vendors and staff experts. Professional development will be conducted both internally and externally in effort to support the educational program. Internal PD will be presented by site based leadership built upon the research and best instructional practices of John Hattie which emphasizes goal setting, reflection and feedback as a means of fine tuning effective teaching and learning. Teachers will also be evaluated by the formal evaluation tools developed by Charlotte Danielson, therefore an internal PD delivery will include an explicit explanation of what that tool looks like, how it will be implemented by leadership and how it will be used to measure performance. Internal PD will also be provided by mentor teachers through implementation of a strong BT plan and onsite instructional coaches. Internally developed PD also includes workshops designed and implemented already for MTSS, Reading instruction and effective lesson planning.

External PD will be provided by 3 primary sources: The Teachers College of Columbia University in effort to develop SCSA as a Home Grown Institute for Workshop delivery of Reading/Writing; Education Studio via Discovery Place for all STEM Education which includes initial and ongoing PD, classroom coaching, feedback and lesson plan development and support;

. All prescribed professional development is aligned to the educational model of the school and designed specifically to help teachers build instructional capacity in order to promote improved student academic achievement. Initial training will be uniform to benefit the entire staff, and ongoing pd will be tailored to the individual needs of the staff as deemed appropriate based on evaluative feedback.

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

The 10 pre-service PD days include intensive initial training to prepare teachers for the Reading and Writing Project Workshop Delivery Model, the STEM instruction via Educationa Studio (Discovery Place) and SCSA culture/climate.

Days 1-3 internal PD will be provided by School Leadership with regards to expectations for:

1. School mission/vision and culture; expectations; Staff Handbook, BT Plan, Communication, Calendar, Committees, Support, Master Schedule etc
2. MTSS framework and Benchmark
3. Responsive Classroom/Behavior

Days 4-7 are deigned to develop MCSA as a Home-Grown Institute for Teachers College. Teachers will receive 4 days of training in the following topics (whole group and small group)

\*Home Grown Reading Institute (Grades K-8)

The central role of curriculum development and planning in the teaching of reading; Units of study across the year in the reading workshop; The components of balanced literacy; Comprehension strategies; Assessing and planning for work with individuals and small groups; Read aloud and accountable talk; Writing about reading.

\*Home Grown Writing Institute (Grades K-8)

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The central role of curriculum development and planning in the teaching of writing; Units of study across the year in the writing workshop; Methods of holding students accountable for doing their best work; Assessing and planning for work with individuals and small groups; Using literature to help students craft their writing; Classroom structures that support inquiry and collaboration.

\*Content area literacy \*Meeting the Needs of Diverse Learners (ELL, EC, AIG, At-risk)

(<http://readingandwritingproject.org/services/professional-development>)

Secondly, teachers will have intensive initial training provided by Discovery Place to help support STEM instruction and to build effective practices for teachers in STEM education.

Days 8-10 the Discovery Place

will present (whole group and small group) \*Standards-based innovative and engaging activities; Content-Based Workshops that provide opportunities to interact with experts and engage in collegial discourse; hands-on, inquiry-based activities can be adapted to most grade levels or differentiated for students with special needs. Teachers will learn how to incorporate STEM instruction through all subject areas and which types of teaching and learning activities support STEM education. With a science focus, many Workshops integrate additional subject areas such as art, mathematics, social studies and literacy. Through the Discovery Place Education Studio, educators will be inspired and effective teachers of science, technology, engineering and math (STEM) through hands-on courses, interactive workshops and real-time learning labs. With access to new ideas and field experts, the MCSA teachers will take home a variety of innovative resources that can be customized to their specific classroom environments and appropriate for their grade level of instruction (<http://educationstudio.org/discover>).

Ongoing PD will be held on the dates indicated in the School Calendar to support and promote instructional best practices and will be focused on areas of need based upon feedback from Leadership, Teachers and student performance data. Teachers will be encouraged to attend individual PD workshops presented by DPI, the Region/LEA that are aligned to their unique area of need, interest or growth. Teachers will be formally observed utilizing the Charlotte Danielson Framework for Reaching in cooperation with the NCEES/EVAAS program and their PDP will be determined according to those observations and conversations between Leadership and Faculty. staff will also have the opportunity to attend workshops or institutes specific to their field of expertise such as the EC Summer Institute and MTSS trainings. During pre-planning, staff will have time to work together to plan for student services for students enrolled with IEP, 504, AIG DEP and ELL plans.

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.*

The Schools operating and instructional calendar are designed to meet the mission of the School. The yearly calendar is drafted at 179 student days which allows for more staff PD and conference days during the year. Staff are expected to work 200 days, (in year 1 only) thus allowing 21 days for PD, conferences and make up dates if needed. The operating calendar is also based on extended days so we have included 1075 hours of instruction into the regular schedule. An ELP (extended learning program) is available for those at-risk students who need assistance with homework/tutoring etc. This

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is a separate program from the tuition based Aftercare. After year one, teachers will report to work 1 week prior to School for 195 days per year.

Our K-8 model includes a seven-hour day to ensure protected time for workshop instruction, a STEM block, and 30 minutes for MTSS/remediation/acceleration. The calendar also allows for two functions: Grade level common planning time during specials throughout the year and; Professional Development and Conference days during pre-planning and throughout the year that allow for external PD to provide full day training and planning/implementation. Conference days are included to meet the mission of the School related to parent and student engagement and careful implementation of the standards-based report cards to share student growth and achievement.

The staffing structure we implemented in Mallard Creek was very effective in securing an experienced, master teacher in each grade level to serve as Team Leader and balancing the staff rosters with experienced and novice teachers to help maintain experience, effective teaching strategies and enthusiasm for an innovative model. Onsite leadership will have experience in Workshop Model and/or STEM instruction and success teachers from Mallard Creek will help support new staff in Steele Creek.

### **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)).*

The Schools Board and staff will make extensive efforts to address people where they meet, work, pray and play in order to communicate the opportunities available at the new school. Special effort will be taken to ensure that marketing, application and registration materials are available in multiple languages. All marketing materials and the Schools website will include the following statement: "Tuition-free public charter school". A large-scale postcard drop will be created and sent out inviting parents to attend parent informational sessions. The postcards will be largely distributed to the 5-8 mile radius in which the School intends to serve in the Southwest corridor of Charlotte-Meck as described with targeted maps included. This area was selected due the fact that this growing population is not currently served by a STEM based charter school in the immediate surrounding areas, and this particular area the only other charter schools comparable to ours in grade span or size are 5-8 miles away. The Steele Creek communities are expected to continue to grow at an escalated pace, and members of the board are tied to this community. The areas targeted for postcards and intensive marketing and recruiting efforts are included in the appendices as target maps. The Board and local community supporters will engage the community through public presentations and partnerships with

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other local agencies and non-competitive schools. These postcards described have proven to be highly successful in the past. Local Board members, school leadership and invested parents will also work in a grass-roots effort to share printed materials with families and invite them to the open sessions. The promotional plan to publicize the school will be designed to reach the entire community and, accordingly, all racial/ethnic groups within it. The school will implement a community awareness plan that will target all area elementary schools, area communities and homeowner associations. Presentations will include information about charter schools in general and specifically about the Schools curriculum focus and the application procedure. Flyers will be developed in multiple languages for distribution at area businesses, community centers, churches, and child care facilities. The Schools staff will contact social service agencies in the area that typically serve "harder to reach" families. The School will ensure that there are no "built in" barriers for applications or attendance in the school. School personnel will solicit opportunities to meet with families served by these agencies for a "direct" opportunity to inform parents about the new school.

Finally, the School will create and share a variety of social media to inform the community about the new School. Facebook, Twitter, Youtube and Instagram will be utilized in a safe and professional manner to help share invitations to parent information sessions, and provide multiple forms of applications for enrollment. Parents will have the ability and opportunity to apply for a seat online through our application database system, or in person via hard copy. We will publicize the open enrollment periods and the lottery dates and ensure that there is equal opportunity for acceptance. Students will be considered for admission without regard to ethnicity, national origin, gender, or achievement level. Although students will most likely come from the neighboring communities, the promotional plan to be followed in publicizing the school will be designed to reach the entire community and accordingly, all racial/ethnic groups within it. . The School will embrace all students, regardless of their racial, cultural, ethnic or religious orientation.

### **Parent and Community Involvement**

- 1. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
- 2. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.*

The school will implement a community awareness plan that will target all area elementary schools, area communities and homeowner associations. The Steele Creek communities are expected to continue to grow at an escalated pace, and members of the board are tied to this community. The areas targeted for postcards and intensive marketing and recruiting efforts are included in the appendices as target maps. The Board and local community supporters will engage the community through public presentations and partnerships with other local agencies and non-competitive schools. Board members and staff of MCSA are tied to families and businesses in the Steele Creek area and will serve as community liaisons. Our partnership with Discovery Place may prove to secure a partnership with Microsoft headquartered in this area as a business cohort and sponsor for technology. A social media page connection has already been made. Our founding team will



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reach out to secure other business partnerships and community relations during this process and leveraging our strong relations with businesses and families in MCSA.

Research suggests that when both school and home share the responsibility for students educational success, social and economic stressors are less apparent. Parental involvement in a child's education process is vital to ensuring that the students are not only being encouraged at school to be successful but that they are also being encouraged at home as well (Bowen, 1999). The School will provide parents with information in a timely manner and will provide resources to stimulate parental participation in their child's education. Parents will be encouraged to attend quarterly data chats and student led conferences, as well as student project exhibitions. Parents will also be strongly encouraged to volunteer in STEM based academic projects and activities to support the academic achievement and growth of each student. Parental involvement is critically important in fostering the success of students, so the school will make steadfast efforts to motivate parental participation. Student performance will be reported through quarterly report cards and interim/progress reports both of which will require a parent signature. Students who are failing courses, or failing to make adequate progress will have additional letters of notification for parents to read and sign that acknowledge students identified for Tiers 2 and 3 of MTSS and those who are at-risk for retention. Finally, parents will be invited to attend a number of formal events at the school including curriculum nights which will define and address promotion criteria and grade level expectations as well as data conferences in which student data on district, state and internal benchmarking assessments will be shared by the teachers and the students. Students will play an integral role in their progress by receiving feedback from teachers on tests, quizzes, projects and participation. Individual meetings and conferences will be held to review student performance and assessment data as a part of a holistic approach to using student performance and assessment data to improve instruction and learning. Students in grades 3-8 will be responsible to lead parent conferences to share their data and progress. In the first quarter, teachers will work with students to show them how to read data and to set goals. This information will then be shared with their parents to help facilitate a sense of ownership for their learning, as well as foster open and improved communication skills.

## **Admissions Policy**

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

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

As a charter school, School will be open to all students who would otherwise

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qualify for enrollment in North Carolina Public Schools. School will open enrollment year 1 immediately following final approval. No criteria for admission will be used except the completed application. The application may be completed online through our website unless a family is unable to access the site. In that case, we will provide a paper application to parents when requested. The application will include the students name, parent/guardian names, current address of student, phone number of parent/guardian, email of parent/guardian, county of residence, current grade level, their grade level for the coming year, students date of birth, current school, the name of any siblings already enrolled at the school, declaration of the students residence in the state of North Carolina, confirmation of access to email, parent email address and an indication as to how the family would like their children entered into the lottery.

#### Enrollment Timeline:

August 2018 -February 2019: Initial student application period begins.

March 1, 2019: First official lottery. If the number of applicants exceeds capacity, admission lottery will be conducted and Parents will be notified of childs acceptance to the school. Parents will be required to complete a letter of acceptance and will be enrolled into the School. If there is greater subscription than there are available seats a waitlist will be generated.

April 1- June 30, 2019: Second registration period begins. If number of applicants exceeds capacity, lottery will be conducted. Parents of students enrolled during second registration period will be notified of their childs acceptance to the school.

#### Year two (2) and subsequent years:

Recruitment activities will commence at the end of the calendar year. The earlier enrollment period will enhance the effectiveness of the schools marketing and communications efforts and allow students and parents to more carefully weigh their options. Applications period will begin each November.

#### Lottery Process:

The School will have an open admissions policy as required by statute, unless the number of applicants exceeds capacity. During the initial open enrollment period, all applicants will be added to our database until the First Lottery. On the day of the First Lottery, the database will randomly select students for enrollment based on the number of seats available at each grade level. If the number of applicants is greater than the number of seats available, the remaining students will be placed on a waiting list for the Second or following lotteries. In such case, all applicants shall have an equal chance of being admitted through a random selection process conducted by the Schools accounting firm in conformity with North Carolinas Charter School Legislation. All students in the lottery will be assigned a waiting list number should student seats become available or capacity increases. Any premature vacancies will be filled in the same way described above. If the number of applications falls short of the established capacity, supplemental registration periods may be held for the purpose of reaching student capacity. If the parents response is negative or if there is no response then the School shall move to the next applicant selected in the lottery until all student vacancies have been filled.

#### Enrollment Priority:

SCHOOL will follow all rules and regulations regarding enrollment priority

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as specified required by applicable North Carolina law

The following groups will have enrollment priority at School for subsequent school years in the order that follows as space permits in each grade:

1. Children of full time employees and board members (may not exceed 15% of total school population)
2. Siblings of current students (as determined by Charter School law G.S. 115C-238.29F(g)(5a))

### **Weighted Lottery**

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

Yes:

No:

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

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

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

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

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**PROJECTED ENROLLMENT**

**2018-19 through 2022-2023**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools

LEA #2

LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000
Kindergarten	80	0	0	80	0	0	80	0	0	80	0	0	80	0	0
Grade 01	84	0	0	84	0	0	84	0	0	84	0	0	84	0	0
Grade 02	84	0	0	84	0	0	84	0	0	84	0	0	84	0	0
Grade 03	84	0	0	84	0	0	84	0	0	84	0	0	84	0	0
Grade 04	88	0	0	88	0	0	90	0	0	90	0	0	90	0	0
Grade 05	88	0	0	88	0	0	90	0	0	90	0	0	90	0	0
Grade 06	46	0	0	88	0	0	96	0	0	96	0	0	96	0	0
Grade 07	0	0	0	69	0	0	96	0	0	96	0	0	96	0	0
Grade 08	0	0	0	0	0	0	94	0	0	94	0	0	94	0	0
	554			665			798			798			798		

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<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Since this seems to be a replicated school as stated earlier will the boards be the same and/or be collaborating with one another or will this be a complete separate entity?	Jessica Kelly	Governance a
How will it be decided as to the actual size of the functioning board? (5-9 members?)	Shannon Stein	Governance a
Elaborate on the relationship of this board to the Mallard Creek STEM Academy board	Lynn Kroeger	Governance a
NA	Jessica Kelly	Proposed Man
What flexibility does SCPA have if they are dissatisfied with leadership since they are employed by CSUSA?	Shannon Stein	Proposed Man
Does SCPA have the flexibility to sever the relationship with CSUSA in the future? What does that look like? (I.e. penalty, timeframe, etc.)		
Will the principal need the board's approval for terminating a teacher or staff member? Who has final say on the termination of teachers or staff members?	Les Stein	Staffing Pla
If the average teacher salary will be \$42,000 will most of the teachers be entry level?		
The applicant doesn't "outline the school's proposed salary range and employment benefits for all levels of employment" as instructed in this section. The average teacher salary seems low.	Kenneth Tucker	Staffing Pla
Is there cost affiliated with Discovery Place and Teachers College partnerships?	Jessica Kelly	Staffing Pla
Since you are not participating in the retirement system what will be used in its place, if anything? How will that impact your hiring and retention rates? What research has been done in the area to see if system in place is competitive?		
Are you using the DPI state pay scale for teacher salaries?		
Clarify how this extensive PD aligns with proposed budget? If middle of the year hiring or hiring after this training occurs would happen is there a plan in place to make sure those staff also receive the training?	Jessica Kelly	Staff Evalua
No Child Left Behind Act of 2001 has been replaced by Every Student Succeeds Act, signed in 2015.	Les Stein	Staff Evalua
Please elaborate on the types of PD provided by the Discovery Place.	Kenneth Tucker	Staff Evalua
Projected enrollment too high for first year.	Arasi Adkins	Projected St
What data was used to determine projected enrollment?	Jessica Kelly	Projected St
Want to better understand the relationship with Alliance Education Services - is this a CMO? Where is their fee in the budget?	Lindalyn Kakadelis	Projected St
N/A	Shannon Stein	Weighted Lot

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Alan Hawkes	
Cheryl Turner	
Kenneth Tucker	Pass
Steven Walker	Pass
Deanna Townsend-Smith	
Heather Soja	Pass
Arasi Adkins	Fail
Jessica Kelly	Pass
Joe Maimone	Pass
Lindalyn Kakadelis	Fail
Les Stein	Pass
Lynn Kroeger	Pass
Phyllis Gibbs	

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Robert McQuat	
Shannon Stein	Pass
Sherry Reeves	Pass
Tammi Sutton	

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## **V. OPERATIONS**

### **Transportation Plan:**

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

Buses will be provided as needed for students who live a reasonable distance from the school, which would be considered as a 1-5 mile radius from the geographic center of the physical location of the school. Transportation costs are reflected in the school budget. Bus routes will consist of depot stops strategically placed at safe locations where students enrolled at the school are concentrated. Admission to the school, however, is not predicated upon residence. Therefore, any child eligible to enroll in a public North Carolina School may enroll at the charter school. For families who enroll into the school who do not qualify for bus transportation, parents may provide transportation to the school on a daily basis. Carpooling will be facilitated via online signups accessible through the schools website. The school will also contract with approved vendors for field trips, local competitions and athletic events as needed and also as articulated in the school budget. Bus Transportation is a major unknown variable with new charter school operations due to the lack of conventional zoning or districting. The budget includes a substantial contingency fund which will account for the costs of providing bus transportation as described in the application. The budget contains a separate line item for gasoline to account for other aspects of school transportation, such as field trips and athletics. The stop locations will be within an approximate 1-4 mile radius to allow for depot type stops to be utilized by the school and students, while also allowing for reasonable transit times for students to be on the bus itself. Bus seats are offered on a first come, first served basis, and carpooling will also be encouraged through a student directory and bulletin board system. Several successful charter schools in the state employ these practices successfully within their programs. If eligible, the school will apply for a grant under NCGS 115C-218.106.

### **School Lunch Plan:**

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

The program is designed to outsource a fully functional NSLP compliant program to a vendor at a cost neutral basis to the school. The program will undergo a state-approved RFP process and meet all criteria to operate under DPI/NSLP guidelines in order to serve reimbursable meals. The school will contract with a food service vendor for breakfast and lunch. The vendor will provide equipment including warming ovens, hand wash sinks, triple sinks (for equipment & utensil washing), and refrigeration to store food once it has been delivered to the school. All food handlers will be required to complete Food Handling Training as mandated by the Department of Health. Student meal counts and records of student participation in the National School Lunch Program will be maintained at the school. The Governing Board will require the vendor to supply a monthly menu meeting the requirements of

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the National School Lunch Program. These menus will be published monthly and presented to parents and students. The meal provider will be required to submit evidence of proper meal balance and portion size for the students served. The vendor will ensure that the point of sale system accurately provides a count of reimbursable meals by category (free, reduced price, full pay) served to students. These counts will be taken at point of meal service and only meals that meet pattern requirements will be claimed for reimbursement. The School will adopt the sanitation and reporting requirements prescribed by the health dept. The health dept will be notified of the schools intent to provide food service to students. The School will obtain an application for an operating permit, maintain that licensure and the School will post the results of health and food inspections on its website. The school will follow all required procedures when distributing and processing F/R Meal Applications. This is the process that several charter schools follow to deliver breakfast and lunch programs under NSLP.

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

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$3,000,000		\$2,800.00
Officers and Directors/Errors and Omissions	\$2,000,000		\$2,100.00
Property Insurance	\$4,000,000		\$4,000.00
Motor Vehicle Liability	\$1,000,000		\$350.00
Bonding Minimum/Maximum Amount	\$1	\$250,000	\$450.00
Other	\$5,000,000		\$10,650.00
Total Cost			\$20,350.00

\*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.



**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 is already in final negotiations with a private real estate developer who will secure the land, construct the school facility, and will then lease the facility to Steele Creek STEM Academy. Before the school begins operations, DPI will be provided with documentation of ownership or lease of the facility and certification that the building satisfies all occupancy requirements. The facility layout will be decided upon through a collaborative effort of the Board and the developer, and will include a design based on current research on safe schools, adequate classroom and office space, appropriate outdoor recreational areas, designated pick-up and drop-off zones, and parking for staff and visitors. The Board will work closely with the developer to ensure a timely completion of the facility. In the event the charter application is approved, the school will issue an RFP for construction. Once the charter is awarded, the school will vigorously pursue a permanent facility as described above. Funding for a permanent facility has already been secured and is referenced in Appendix M.

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

The budget provided includes a projected \$550k+ lease payment for the facility to demonstrate the viability of the school, which targets a current commercial lease market rate of approximately 14 dollars per sqft, or approx \$125 per sqft to construct

**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.*

The Board will carefully monitor the construction progress schedule and will receive weekly updates from the developer as to the progress of the facility. However, should the construction progress not be sufficient to guarantee delivery of the school facility by the beginning of the school year, a contingency plan has been established and will activate approximately six months prior to the initial opening of school. The school has received offers from both Mobile Modular and ModSpace to construct a school facility in the event that the primary facility is not ready for school opening. The focus of the Board will shift to the development of a site which will suit the schools needs for a 1-3 year span, utilizing modular classroom space. Approximately five modular units of eight

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classrooms each would be required to open the school according to the initial years K-6 plan. Additional units may be added should the school choose to remain at the alternate site for the following school year. Local churches and other similar organizations have been contacted to open dialogue in the event a contingent location is needed. It is expected that no programs will be delayed should an alternate facility be used, and the school will encumber no lease payments or otherwise incur any debts for the primary facility until such time as the primary facility is ready for school use. The Board at that time will negotiate a transition plan in the academic and financial best interests of the school.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
What research was conducted to determine if the mile radius and target population would utilize the provided transportation?	Jessica Kelly	Transportati
Why will transportation only be provided within a 5 mile radius? Is this sufficient?	Lynn Kroeger	Transportati
Where will the students eat lunch? Will the facility include a cafeteria?  Will the school provide lunch for students who do not qualify for free/reduced lunch but fail to bring a lunch to school?  Who will be assigned to operate the school's lunch program?	Les Stein	School Lunch
Will the use of the modular classrooms/spaces hinder the STEM curriculum?	Jessica Kelly	Facility and
Why is there a need to create a brand new school, when most of the proposed program is already happening at traditional public schools?	Arasi Adkins	Facility and

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Alan Hawkes	
Tammi Sutton	
Sherry Reeves	Pass
Shannon Stein	Pass
Robert McOuat	
Phyllis Gibbs	
Lynn Kroeger	Pass
Les Stein	Pass
Lindalyn Kakadelis	Pass
Joe Maimone	Pass
Jessica Kelly	Pass
Arasi Adkins	Fail
Heather Soja	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Kenneth Tucker	Pass
Cheryl Turner	

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## VI. FINANCIAL PLAN

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

### **Budget: Revenue Projections from each LEA 2018-19**

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

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

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

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

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

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

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

LEA #1600 - Charlotte-Mecklenburg Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,992.65	554	\$2,765,928.10
Local Funds	\$2,600.00	554	\$1,440,400.00
Federal EC Funds	\$4,253.55	55	\$233,945.25
<b>Totals</b>			\$4,440,273.35

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
-State ADM Funds	\$2,765,928	\$3,320,112	\$3,984,135	\$3,984,135	\$3,984,135
-Local Per Pupil Funds	\$1,440,400	\$1,726,400	\$2,074,800	\$2,074,800	\$2,074,800
-Exceptional Children & Federal Funds	\$233,945	\$282,383	\$339,433	\$339,433	\$339,433
-Other Funds*	\$177,885	\$202,716	\$222,759	\$222,759	\$222,759
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$4,618,158</b>	<b>\$5,531,611</b>	<b>\$6,621,127</b>	<b>\$6,621,127</b>	<b>\$6,621,127</b>

**\*If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.**

**Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix J.**

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000	1	\$80,000	\$80,000
Assistant Administrator	1	\$54,000	\$54,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000	2	\$54,000	\$108,000
Finance Officer	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800	1	\$40,800	\$40,800
Clerical	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000
Food Service Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Custodians	2	\$30,600	\$61,200	2	\$30,600	\$61,200	3	\$30,600	\$91,800	3	\$30,600	\$91,800	3	\$30,600	\$91,800
Transportation Staff	3	\$13,000	\$39,000	3	\$13,000	\$39,000	4	\$13,000	\$52,000	4	\$13,000	\$52,000	4	\$13,000	\$52,000
A - Total Admin and Support:	11		\$371,000	12		\$425,000	14		\$468,600	14		\$468,600	14		\$468,600
Instructional Personnel:															
Core Content Teacher(s)	27	\$40,000	\$1,080,000	31	\$40,000	\$1,240,000	36	\$40,000	\$1,440,000	36	\$40,000	\$1,440,000	36	\$40,000	\$1,440,000
Electives/Specialty Teacher(s)	6	\$40,000	\$240,000	8	\$40,000	\$320,000	9	\$40,000	\$360,000	9	\$40,000	\$360,000	9	\$40,000	\$360,000
Exceptional Children Teacher(s)	3	\$44,000	\$132,000	4	\$44,000	\$176,000	5	\$44,000	\$220,000	5	\$44,000	\$220,000	5	\$44,000	\$220,000
Instructional Support	2	\$43,000	\$86,000	2	\$43,000	\$86,000	3	\$43,000	\$129,000	3	\$43,000	\$129,000	3	\$43,000	\$129,000
Teacher Assistants	6	\$20,000	\$120,000	7	\$20,000	\$140,000	9	\$20,000	\$180,000	9	\$20,000	\$180,000	9	\$20,000	\$180,000
B - Total Instructional	44		\$1,658,000	52		\$1,962,000	62		\$2,329,000	62		\$2,329,000	62		\$2,329,000

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	55		\$2,029,000	64		\$2,387,000	76		\$2,797,600	76		\$2,797,600	76		\$2,797,600
Administrative & Support Benefits															
Health Insurance	8	\$5,000	\$40,000	9	\$5,000	\$45,000	10	\$5,000	\$50,000	10	\$5,000	\$50,000	10	\$5,000	\$50,000
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	4	\$1,105	\$4,420	4.5	\$1,105	\$4,973	5	\$1,105	\$5,525	5	\$1,105	\$5,525	5	\$1,105	\$5,525
Life Insurance	8	\$15	\$120	9	\$15	\$135	10	\$15	\$150	10	\$15	\$150	10	\$15	\$150
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	11	\$600	\$6,600	12	\$600	\$7,200	14	\$600	\$8,400	14	\$600	\$8,400	14	\$600	\$8,400
Social Security	11	\$2,500	\$27,500	12	\$2,500	\$30,000	14	\$2,500	\$35,000	14	\$2,500	\$35,000	14	\$2,500	\$35,000
Unemployment	11	\$225	\$2,475	12	\$225	\$2,700	14	\$225	\$3,150	14	\$225	\$3,150	14	\$225	\$3,150
D - Total Admin and Support Benefits:	53		\$81,115	58.5		\$90,008	67		\$102,225	67		\$102,225	67		\$102,225
Instructional Personnel Benefits:															
Health Insurance	44	\$5,000	\$220,000	52	\$5,000	\$260,000	62	\$5,000	\$310,000	62	\$5,000	\$310,000	62	\$5,000	\$310,000
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	22	\$1,105	\$24,310	26	\$1,105	\$28,730	31	\$1,105	\$34,255	31	\$1,105	\$34,255	31	\$1,105	\$34,255
Social Security	44	\$2,500	\$110,000	52	\$2,500	\$130,000	62	\$2,500	\$155,000	62	\$2,500	\$155,000	62	\$2,500	\$155,000
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	44	\$600	\$26,400	52	\$600	\$31,200	62	\$600	\$37,200	62	\$600	\$37,200	62	\$600	\$37,200
Life Insurance	44	\$15	\$660	52	\$15	\$780	62	\$15	\$930	62	\$15	\$930	62	\$15	\$930
Unemployment	44	\$225	\$9,900	52	\$225	\$11,700	62	\$225	\$13,950	62	\$225	\$13,950	62	\$225	\$13,950
E - Total Instructional Personnel Benefits:	242		\$391,270	286		\$462,410	341		\$551,335	341		\$551,335	341		\$551,335
D+E = F - Total Personnel Benefits	295		\$472,385	344.5		\$552,418	408		\$653,560	408		\$653,560	408		\$653,560

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A+D = G - Total Admin and Support Personnel (Salary & Benefits)	64		\$452,115	70.5		\$515,008	81		\$570,825	81		\$570,825	81		\$570,825
B+E = H - Total Instructional Personnel (Salary & Benefits)	286		\$2,049,270	338		\$2,424,410	403		\$2,880,335	403		\$2,880,335	403		\$2,880,335
G+H = J - TOTAL PERSONNEL	350		\$2,501,385	408.5		\$2,939,418	484		\$3,451,160	484		\$3,451,160	484		\$3,451,160

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
	Administrative & Support:					
Office:	Office Supplies	\$18,000	\$20,000	\$22,000	\$22,000	\$22,000
	Communications & Telephone	\$10,000	\$12,000	\$13,000	\$13,000	\$13,000
	Copier leases	\$20,000	\$25,000	\$35,000	\$35,000	\$35,000
Professional Contract	Legal Counsel	\$10,000	\$12,000	\$14,000	\$14,000	\$14,000
	Financial	\$34,902	\$40,466	\$47,376	\$47,376	\$47,376
Facilities	Facility Lease/Mortgage	\$550,000	\$750,000	\$1,000,000	\$1,150,000	\$1,250,000
	Maintenance	\$6,050	\$6,900	\$7,000	\$7,000	\$7,000
	Custodial Supplies	\$10,000	\$11,500	\$11,500	\$11,500	\$11,500
	Custodial Contract	\$38,000	\$46,000	\$46,000	\$46,000	\$46,000
	Insurance (pg19)	\$20,350	\$28,950	\$34,250	\$34,250	\$34,250
Utilities	Electric	\$45,000	\$52,000	\$54,000	\$54,000	\$54,000
	Water/Sewer	\$30,000	\$38,000	\$45,000	\$45,000	\$45,000
	Trash	\$6,500	\$7,500	\$7,500	\$7,500	\$7,500
Transportation	Buses	\$30,500	\$30,500	\$45,600	\$45,600	\$45,600
	Gas	\$12,000	\$12,000	\$18,000	\$18,000	\$18,000
	Oil/Tires & Maintenance	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
Other	Marketing	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
	Travel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Facilities	Debt Service	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000
	Athletic/Event Rent	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Building Supplies And Materials	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	General Contracts	\$60,000	\$80,000	\$100,000	\$100,000	\$100,000
	Misc. Contracts	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Security Monitoring	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Office:	Non-Cap Office Hardware	\$2,000	\$3,000	\$3,000	\$3,000	\$3,000
	Equipment And Furniture	\$10,000	\$12,000	\$15,000	\$15,000	\$15,000
Professional Contract	Audit Fees	\$10,500	\$10,500	\$10,750	\$10,750	\$10,750
	Bank Fees	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	General Administration	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000
	Sis Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Technology Support Services	\$5,000	\$6,500	\$7,000	\$7,000	\$7,000
	Hr Support Services	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000



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Office:	Misc. Expenses	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	K - TOTAL Administrative & Support Operations	\$1,046,802	\$1,324,816	\$1,655,976	\$1,805,976	\$1,905,976
	Instructional:					
Classroom Technology	Computers	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
	Software	\$22,000	\$24,000	\$26,000	\$26,000	\$26,000
Instructional Contract	Staff Development	\$14,000	\$16,000	\$16,000	\$16,000	\$16,000
Books and Supplies	Instructional Materials	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
	Curriculum/Texts	\$75,000	\$75,000	\$20,000	\$20,000	\$20,000
Books And Supplies	Library Books	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Ec Supplies	\$8,000	\$8,000	\$5,000	\$5,000	\$5,000
	Health Supplies	\$750	\$750	\$1,000	\$1,000	\$1,000
	Safety Supplies	\$3,500	\$1,000	\$1,000	\$1,000	\$1,000
	Athletic Supplies	\$13,000	\$15,000	\$15,000	\$15,000	\$15,000
	Postage	\$2,000	\$2,000	\$3,000	\$3,000	\$3,000
	Memberships	\$4,000	\$4,600	\$4,600	\$4,600	\$4,600
Classroom Technology	Internet Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Non-Cap Hardware	\$10,000	\$14,000	\$14,000	\$14,000	\$14,000
	Technology Supplies	\$4,000	\$7,000	\$7,000	\$7,000	\$7,000
Other	Capital Instructional Equipment And Furniture	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Classroom Technology	Instructional Technology And Equipment Lease	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000
Instructional Contract	Instructional Services	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Ec Services (Psych, Speech, Ot)	\$60,000	\$65,000	\$80,000	\$80,000	\$80,000
	Athletic Services	\$10,000	\$10,000	\$12,000	\$12,000	\$12,000
Professional Contract	Tuition And Fees	\$1,000	\$5,000	\$7,000	\$7,000	\$7,000
Instructional Contract	Substitute Teachers	\$16,000	\$21,000	\$38,000	\$38,000	\$38,000
	L - TOTAL Instructional Operations	\$673,250	\$698,350	\$679,600	\$679,600	\$679,600
	K+L = M - TOTAL OPERATIONS	\$1,720,052	\$2,023,166	\$2,335,576	\$2,485,576	\$2,585,576

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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
J - TOTAL PERSONNEL	\$2,501,385	\$2,939,418	\$3,451,160	\$3,451,160	\$3,451,160
M - TOTAL OPERATIONS	\$1,720,052	\$2,023,166	\$2,335,576	\$2,485,576	\$2,585,576
J+ M =N TOTAL EXPENDITURES	\$4,221,437	\$4,962,584	\$5,786,736	\$5,936,736	\$6,036,736
Z - TOTAL REVENUE	\$4,618,158	\$5,531,611	\$6,621,127	\$6,621,127	\$6,621,127
Z - N = SURPLUS / (DEFICIT)	\$396,721	\$569,028	\$834,391	\$684,391	\$584,391

**Budget Narrative:** (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

1. *How was the student enrollment number projected?*

*Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.*

*Provide the break-even point of student enrollment.*

Enrollment of the school is based on a customary matriculation pattern of four classes per grade level K-6. The school will add grade levels and welcome new kindergarten classes in successive years until the school is at its full capacity of 796 students. The NC state average enrollment in elementary schools is 500. The district LEA average is 708, yet almost all of the elementary schools in Steele Creek have well over 800 students enrolled. The NC state average for middle school enrollment is 668. The district LEA average is 1002, yet the middle schools in the Northwest Charlotte region have over 1400 students enrolled. The student to teacher ratio in Charlotte for public schools is 16:1, which is 8.3% greater than the North Carolina state student to teacher ratio. According to the demographics posted on the CMS website, the school district has grown about three percent each year since 1994. This equates to about 3,500 students per year. Much of the growth has been evidenced within the northern and southern portions of the county. It is anticipated that growth will continue for at least the next ten years. Based upon data released in this year's bond referendum, CMS recognizes it has and will continue to have challenges assigning students into schools. There are not enough school facilities to house the growing student population in this area and new school development is not expected to occur until 2020. There are hundreds of students currently in overcrowded classrooms and schools that would consider membership in our charter school for the facility alone and charter school membership (assignment) is not impacted by zoning issues. Furthermore, the proposed Steele Creek STEM Academy will offer a unique STEM program for all students K-8 that is specifically designed to offer students the opportunity to become proficient in the areas of STEM.

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

The Board has pre-identified approximately three hundred thousand dollars in salary and benefits for non core instructional and related staff (or 17% of projected staffing costs), and three hundred thousand dollars in non-staffing related expenses (or 20% of projected non-staff related school

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expenses) that can be immediately reduced should enrollment not meet expectations, for a total of reduction to 70% of the original projected budget, or 431 student equivalent revenue. This enrollment would further reduce the core instructional teacher requirement by eight, reducing the actual revenue needed to break even by an additional three hundred twenty thousand dollars, for an overall composite reduction to 60% of anticipated projected revenue, or the equivalent of approximately 360 students needed to break even. Break Even continued below.

*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*

Not Applicable. The schools budget is built to sustain itself solely on the accumulated per-pupil funding from federal, state and county sources. Any fundraising, grants or donation that the school receives will serve to enrich the existing program and assist the school in achieving its programmatic and financial goals sooner than forecast. The budget as submitted in the appendix also includes a customary aftercare component that provides slight net revenue to the school. The budget includes a total of \$400k+ annually for any and all FFET(Furniture, Fixtures, Equipment and Technology) and instructional materials needed to operate the school, spread across various expense GLs to simulate the probability that the school will combine leases and outright purchases of furniture, IT, textbooks, and other materials for instructional use (such as copy paper). Amortized lease rates allow for the school to develop a year 1 implementation of approximately \$1.25MM in purchasing power, and service this debt without compromising other aspects of the budget. This is customarily how year 1 successful charter schools open, where the various instructional and related items are available for students and staff on day one, and amortized over a 3-5 year span. The five year budget proforma is purposefully built to provide an accurate, yet fundamentally conservative financial basis, ensuing that the school is sustainable over the long term. Three important aspects of the budget which protect the school against unforeseen negative revenue scenarios are: the 5- 7% positive fund balance projection built into the 5 year proforma, all source revenue projections are flat (no annual percentage increase) in the first five years of the school, and the budget does not rely on any outside sources of funds such as grants, fundraising or donations to operate. Additionally, large capital purchases initially budgeted in years one through three could be amortized via long term leases which would free up operating cash during the schools initial opening phase.

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

K-3 20:1, 4-5 21:1, 6-8 22:1 average per classroom

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

The board intends to contract with LBAH for comprehensive financial and relates services support, including: preparation of financial reports each month, preparation of vendor payments , reconciliation of bank accounts, preparation of payroll (including payroll deductions and withholdings), preparation and submission of state and federal payroll taxes and associated reports, preparation and transmission of state and federal reporting in

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accordance with the Uniform Education Reporting System, provide financial, budget and other reports and data independent auditor to plan and conduct annual audit, and confer with staff and board as necessary at reasonable intervals and provide consulting relating to accounting and financial matters. The board may elect to contract with other independent entities or vendors should the school staff require additional assistance in areas necessary to operate the school, or otherwise not be able to provide a specific service through in house staff. Examples of this would include contracting with a licensed vendor for speech and occupational therapy services, should the school not be able to hire qualified candidates, or should the EC service requirement be such that contracting with an outside vendor at an hourly rate would be in the best financial interests of the school versus hiring employees directly. In instances where the board will contract for services with an outside vendor, there will be strict criteria and a robust selection process to ensure that the contracted services are performed appropriately and school funds are expended in the best interest of students. Minimally, potential vendors will be licensed in their respective fields, insured or otherwise bonded, and undergo background checks which mirror the school and the local LEA. The Board or a school leadership designee will research available vendors and independently obtain data (such as a client list for reference checks) to gauge the quality of potential vendors. The Board will vote to contract with specific vendors based on this criteria, and such contracts will be subject to periodic review for efficacy. When appropriate, the board will enact a full Request for Proposal (RFP) process and adjust to fit the individual need as articulated by the board and allowable under state law.

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

The budget as presented, including salaries for administrators, teachers and other school staff reflected in the charter application are averages that were calculated directly from published financial audits from similarly sized charter schools currently operating in North Carolina counties with similar per-pupil county funding amounts, since 2010. The substantial contingency and positive fund balance were thoughtfully constructed to account for those unforeseen or unknowable variables that naturally accompany a new charter school start up, and to guarantee that the school has the fiscal capacity and agility to address those needs. Primary spending priorities are on expenses directly related to student instruction and a conducive learning environment. This would include: salaries and benefits of instructional and support staff, instructional materials and supplies, contracted services for educational support, insurance, facility costs and related costs necessary to provide a safe and healthy learning environment for students. Secondary spending priorities are for those non-essential but beneficial expenses to improve student learning. These costs are usually incurred as the School reaches its targeted student capacity. This would include: additional enrichment, auxiliary supplemental instructional materials, intramural uniforms, etc. The school will contract with an outside food service vendor who is pre-approved to process Free and Reduced Lunch applications and serve within the guidelines of the National School Lunch Program. It is anticipated that the costs associated with this program will be cost neutral. School staff is sufficient in number to assist and otherwise facilitate the breakfast and lunch service if necessary. The school will allocate funds as necessary to comply with state law regarding

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charter school students and transportation to and from school. The acquisition and operation of additional school buses to transport students to and from school, within a reasonable radius of the school will be the first use of surplus funds beyond the anticipated fund balance.

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

*Describe how the school will develop the fund balance.*

The Board has set an anticipated goal of approximately 2-8% percent of annual expenditures to develop the schools unrestricted fund balance. After year one, at no point will the fund balance decrease below 2% of the schools annual approved budget, or one full months worth of operating expenses, whichever is the greater amount. Cash flow will be monitored to ensure that the school's cash balance remains at or above 2% until such time within the first year of operation that the board can accurately predict all financial obligations will be met through the end of the fiscal year. Developing and maintain a healthy fund balance will be a primary component of the schools budgeting process. The systematic budgetary review process conducted by the Board and school leadership consists of four main budgeting periods: Early Bird (June of preceding fiscal year), Post ADM (September), Spring (February) and Final (July of following fiscal year). This schedule of compulsory budget review will ensure a balance between revenue and expenses, and empowers the Board and school leadership with the agility needed to quickly adjust the budget. This practice when combined with monthly review of financial Budget versus Actual statements prepared by the schools financial accountant, local comptroller and school principal will allow the school to thoughtfully and methodically develop an appropriate unrestricted fund balance.

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

Based upon current discussions with real estate developers, the estimate that the per square foot lease cost of the completed facility will be approximately \$14 per square foot, which will result in an annual lease estimate in the half-million dollar plus range and escalating after year 1. The rate variation is due variation to the actual size of the facility and whether the school leases an existing facility (\$10-\$12/square foot per year) or builds a new facility (\$12-\$14/square foot per year). These costs are consistent with leases that have recently been executed in the area. These costs are also consistent with our information on current land costs and construction costs. From our research and discussions with commercial real estate brokers, general contractors and real estate developers, we estimate the total cost of a new facility would be between \$8 million and \$10 million depending on the location and size of the facility. This would translate into posted estimated annual lease costs assuming a typical lease CAP rate of 7% to 9%. The Board has already received a funding commitment from a nationally recognized and reputable investor who specializes in commercial real estate to construct and lease back the facility to the school as described above. The Board has already received a funding commitment for all furniture, fixtures and equipment necessary to open and operate the school from an internationally reputable company who specializes in equipping new schools and specifically charter schools. The funding commitment is for approximately \$1,300,000, and is evenly split into monthly

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payments beginning September after the school opens and spans over 42 months at an 8% annual interest rate. School bus financing will be facilitated by the Carolina Thomas Bus company via their Daimler-Chrysler/Mercedes financing arm. Current finance rates are 5.6% for a 7 year term on 72 passenger-rated school buses, and payments are reflected in the budget. As the school may discharge funds in support of the school opening, the Board has opened negotiations with Charter School Capital, who has offered to advance operating capital in exchange for acquiring a portion of the schools accounts receivable. This continues to be an ongoing discussion and there is a proactive debt service payment placed in the budget in the event the Board chooses to move in this direction.

*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*

Not Applicable. The school will not rely on assets from any external sources. As described in the budget and financing narrative, the Board has arranged for a long term lease for all necessary furniture, fixtures and equipment (FFET) to open and operate the school. Additional asset needs are provided for in the annual operating budget and increase as the school grows in enrollment.

Break even point Continued: This enrollment would further reduce the core instructional teacher requirement by eight, reducing the actual revenue needed to break even by an additional three hundred twenty thousand dollars, for an overall composite reduction to 60% of anticipated projected revenue, or the equivalent of approximately 360 students needed to break even. Contingency Plan continued: Should these proactive measures not fully ameliorate a deteriorating revenue situation, the Board and school leadership team through its established budget review process will identify potential expenses that can be reduced and act in the combined best interest of students and the financial longevity of the school. Should the revenue reduction be a result of lower than expected enrollment, the budget review will also include a reconciliation of current staffing needs and appropriate reductions in force (RIF) will occur within the first six weeks of school.

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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?*

The board will work in conjunction with the financial accountant, auditor and school leadership to develop policies that comply with Generally Accepted Accounting Principals (GAAP), and all federal, state and local law and policy related to monitoring and use of public school funds and those funds received and discharged by a North Carolina Non-Profit Corporation. The internal control system will be documented and evaluated regularly by the board, school leadership, and financial accountant, and will be reviewed as part of the annual financial audit. An accounting policy and procedures manual will be developed that includes the following: an organizational chart which sets forth the actual lines of responsibility and that shows individual names and titles, accounts payable and accounts receivable listings, listing of all bank accounts and authorized signatories, payroll calendar and processing information, vendor files, lease and contract documents, segregation of duties chart, cash handling procedures, credit card policy, travel and expense policy, master copies of school-based forms (time sheets, expense reports, etc.) School staff will receive training about the internal control system and their individual responsibilities within the system. The organizational chart, accounting procedures, record retention policy, vendor list, and chart of accounts will be maintained on a timely basis to eliminate outdated information and include current information. Procedures will be followed by the schools office and leadership team that mirror widely established segregation of duties habits, such as the person making bank deposits is not the same person as who is reconciling those deposits. The school will inventory and track items purchased with school funds, especially those items with an initial value of 700 dollars or more, and also items purchased as a set with a combined initial value of \$700 or more, such as a textbook adoption. Items in these categories may be considered capital purchases and depreciated over time to accurately reflect the schools real asset position. Items in this category that break or no longer serve a useful function may be disposed of by the school. A disposal form which includes a record of the reason for the disposal as well as relevant tracking information on the item will be used, and noted in the inventory.

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

Not Applicable. There are no known or possible related party transactions the board is aware of at this time.

*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.*

Jay E. S Sharpe, CPA  
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Email: [jsharpe@rivescpa.com](mailto:jsharpe@rivescpa.com)

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
first year enrollment aggressive	Joe Maimone	Budget Reven
Not realistic.	Arasi Adkins	Budget Reven
Further elaboration is needed on the agreement with Building Hope (Appendix M).	Kenneth Tucker	Total Budget
Are the other funds from the Building Hope loan? Is this loan necessary or will it cause more unneeded debt?	Jessica Kelly	Total Budget
Concerned about projected revenues based on aggressive enrollment Explain \$200,000 "Other funds"	Lynn Kroeger	Total Budget
Not realistic.	Arasi Adkins	Total Budget
High lead admin salary.  This indicates \$40,000 as core content salary but earlier in application you stated \$42,000. Will all staff be hired at the \$40,000 range and have no salary increase?	Jessica Kelly	Personnel Bu
Teacher salaries at \$40,000 seem low.	Lynn Kroeger	Personnel Bu
Does the budget provide sufficient funds for contracts with related service providers?	Robert McOuat	Operations B
Is the tuition and fees line item included to support continuing education activities for staff? Please elaborate.	Kenneth Tucker	Operations B
What is the professional contract for tuition and fees for?	Arasi Adkins	Operations B

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Tammi Sutton	
Shannon Stein	Pass
Robert McOuat	
Phyllis Gibbs	
Lynn Kroeger	Pass
Les Stein	Pass
Lindalyn Kakadelis	Pass
Joe Maimone	Pass
Jessica Kelly	Pass
Arasi Adkins	Pass
Heather Soja	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Kenneth Tucker	Pass
Cheryl Turner	
Alan Hawkes	
Sherry Reeves	Pass





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

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## OVERALL ASSESSMENT

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

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

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

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

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

<u>CSAB Votes</u>	
No	Yes
0	9
	AQ,SW,JM,AH,CT,H V,LK,PG,SR

***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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<b>Mission, Purposes, and Goals</b>	- craig_tucker
<b>Education Plan</b>	- craig_tucker
<b>Governance and Capacity</b>	- craig_tucker
<b>Operations</b>	- craig_tucker
<b>Financial Plan</b>	- craig_tucker
<b>OVERALL</b>	- dtsmith840 - craig_tucker - dtsmith840

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Do you have specifics to explain that the performances of the public schools in the LEA perform at or below average? - lstein692</p> <p><u>Mission Statement</u> The language reads as though this is an attempted replication of Mallard Creek. - craig_tucker</p> <p><u>Mission Statement</u> Mission statement is not strong. - jessica.kelly</p> <p><u>Mission Statement</u> Evidence of need is not fully shown. The map with other charter locations shows Unity Classical Charter School the closest - that school has not been able to fill their seats. - We also just approved another charter for this area. Does the board expect some on their current waiting list to travel to this area of the county? - kakadelis1</p> <p><u>Educational Need and Targeted Student Population</u> Aside from contracting with Teacher's College and Discovery Place, what makes Steele Creek different from traditional public schools (who are also very focused on developing student skills in STEM and literacy? What if traditional schools contracted with those same agencies? What would differ at Steele Creek? - jade1124</p> <p><u>Educational Need and Targeted Student Population</u> Do the traditional public schools partner with the Discovery Place? Are any of them partnering with the Teachers College? If so, what makes Steele Creek STEM Academy's education plan different than the LEA. - craig_tucker</p> <p><u>Educational Need and Targeted Student Population</u> In first part of application it states this is not a replication of another charter however</p>
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	<p>many times here it is stating that it is a replication of Mallard Creek. This is contradictory. - jessica.kelly</p> <p><u>Educational Need and Targeted Student Population</u> this application refers to Mallard Creek Charter - that school has only been in operation two years. Last year was a C school - did not make growth. - kakadelis1</p> <p><u>Educational Need and Targeted Student Population</u> Applicant should provide more detail on its STEM curriculum. The writing component is strong in detail while the other lacks. - heather_soja</p> <p><u>Educational Need and Targeted Student Population</u> Concerned about meeting enrollment projections - marylynn_kroeger</p> <p><u>Purposes of Proposed Charter School</u> Can you explain what you mean by "developed a relationship with the Teachers College of Columbia?" Do you have an agreement with them? What does the relationship entail?</p> <p>What is the basis for using Charlotte Danielson and Discovery Place to measure teacher effectiveness? Will your administrators be trained to evaluate teacher performance?</p> <p>What specific achievement levels will you be looking for at each grade level? What kind of growth in student performance do you expect the school to show between each year? How many students will be at grade level after years, 1, 2, 3, etc? - lstein692</p> <p><u>Purposes of Proposed Charter School</u> How does this differ from traditional public schools? Couldn't this be implemented there? Why is there a need for a charter school to offer this?</p> <p>How will you ensure equitable parent involvement and participation? What will the parent outreach look like for historically under-served groups? - jade1124</p> <p><u>Purposes of Proposed Charter School</u> Please provide specific details on the relationship with The Teachers College of Columbia. Is it a formal partnership with some kind of official agreement (i.e. MOU, contract, etc.). - craig_tucker</p> <p><u>Purposes of Proposed Charter School</u> How has the school already created a strong relationship with the Teachers College when they are not yet established? Again indication this is a replication.</p> <p>What is the additional cost/agreement in partnering with Discovery Place?</p> <p>Please clarify What growth you expect to see with your targeted population. - jessica.kelly</p> <p><u>Purposes of Proposed Charter School</u> STEM specifics need additional support and evidences for a genuine cross curricular approach. - heather_soja</p> <p><u>Goals for the Proposed Charter School</u> Why do you base your growth expectations on the local average? If the local average is low will your growth figures adequately define the success of your school? - lstein692</p> <p><u>Goals for the Proposed Charter School</u></p>
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	<p>What do you mean by "local average"? All of Charlotte-Mecklenberg Schools? NC state averages? Just those schools where you propose to siphon off students for this charter school? - jade1124</p> <p><u>Goals for the Proposed Charter School</u> Applicant needs to clarify what they mean by "local average". - craig_tucker</p> <p><u>Goals for the Proposed Charter School</u> Clarify what data is being used for local average. - jessica.kelly</p> <p><u>Goals for the Proposed Charter School</u> How will some of the operational goals be measured? (I.e. adequate food, etc.)</p> <p>What will the academic goal be if the proficiency level is below 90%? - shannon_stein</p> <p><u>Goals for the Proposed Charter School</u> Concerned about the enrollment expectations. Need more survey data regarding interest in school What do they mean by "local average?" - kakadelis1</p> <p><u>Goals for the Proposed Charter School</u> STEM curriculum needs detail and focus. Clubs and competitions do not equate to a STEM-focused school. What does a language arts class look like with STEM integration? What about social studies and STEM? - heather_soja</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> Does the school have evidence that these kinds of strategies are not currently being used in the LEA? - craig_tucker</p> <p><u>Instructional Program</u> Applicant shows a detailed STEM approach in this explanation. - heather_soja</p> <p><u>Curriculum and Instructional Design</u> Is there a specific curriculum you will use in support of your STEM instruction? - lstein692</p> <p><u>Curriculum and Instructional Design</u> These strategies are great. What is the evidence to support that most of these same strategies are not being implemented in the traditional public schools in the same geographic region? Can you present evidence otherwise, and is that evidence compelling enough that a new school is warranted?</p> <p>How will you ensure the AIG program and students identified in Tier 2 &amp; 3 MTSS are not racially segregated? - jade1124</p> <p><u>Curriculum and Instructional Design</u> Elaborate and clarify how all of your target populations needs will be met; ELL, EC, AIG, etc.</p> <p>Are these same strategies used at other school already and have you found successful? - jessica.kelly</p> <p><u>Special Programs and "At-Risk" Students</u> Who will be responsible for the AIG program? - lstein692</p> <p><u>Special Programs and "At-Risk" Students</u></p>

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	<p>These are the same exact strategies used in traditional public schools. What makes this charter school different? - jade1124</p> <p><u>Special Programs and "At-Risk" Students</u> Well done in the alignment with mission. - heather_soja</p> <p><u>Exceptional Children – Identification and Records</u> Is there a missing or extra word in this sentence? (The school A transferring EC student is a student ...). What is the meaning f this sentence fragment? (Request for initial evaluation or determination of eligibility.). - robert_mcouat1</p> <p><u>Exceptional Children – Education Programming</u> These are the same exact strategies used in traditional public schools. Why is there a need for a charter school? - jade1124</p> <p><u>Student Performance Standards</u> Does the school make the choice to waive electives to give additional remediation or is that a joint decision with parents? - shannon_stein</p>
<p><b>Governance and Capacity</b></p>	<p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Since this seems to be a replicated school as stated earlier will the boards be the same and/or be collaborating with one another or will this be a complete separate entity?  - jessica.kelly</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will it be decided as to the actual size of the functioning board? (5-9 members?) - shannon_stein</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Elaborate on the relationship of this board to the Mallard Creek STEM Academy board - marylynn_kroeger</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - jessica.kelly</p> <p><u>Proposed Management Organization (EMO/CMO)</u> What flexibility does SCPA have if they are dissatisfied with leadership since they are employed by CSUSA?  Does SCPA have the flexibility to sever the relationship with CSUSA in the future? What does that look like? (I.e. penalty, timeframe, etc.) - shannon_stein</p> <p><u>Staffing Plans, Hiring, and Management</u> Will the principal need the board's approval for terminating a teacher or staff member? Who has final say on the termination of teachers or staff members?  If the average teacher salary will be \$42,000 will most of the teachers be entry level?  - lstein692</p> <p><u>Staffing Plans, Hiring, and Management</u> The applicant doesn't "outline the school's proposed salary range and employment benefits for all levels of employment" as instructed in this section.</p>

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	<p>The average teacher salary seems low. - craig_tucker</p> <p><u>Staffing Plans, Hiring, and Management</u> Is there cost affiliated with Discovery Place and Teachers College partnerships?</p> <p>Since you are not participating in the retirement system what will be used in its place, if anything? How will that impact your hiring and retention rates? What research has been done in the area to see if system in place is competitive?</p> <p>Are you using the DPI state pay scale for teacher salaries? - jessica.kelly</p> <p><u>Staff Evaluation and Professional Development</u> No Child Left Behind Act of 2001 has been replaced by Every Student Succeeds Act, signed in 2015. - lstein692</p> <p><u>Staff Evaluation and Professional Development</u> Please elaborate on the types of PD provided by the Discovery Place. - craig_tucker</p> <p><u>Staff Evaluation and Professional Development</u> Clarify how this extensive PD aligns with proposed budget? If middle of the year hiring or hiring after this training occurs would happen is there a plan in place to make sure those staff also receive the training? - jessica.kelly</p> <p><u>Projected Student Enrollment (Table)</u> Projected enrollment too high for first year. - jade1124</p> <p><u>Projected Student Enrollment (Table)</u> What data was used to determine projected enrollment? - jessica.kelly</p> <p><u>Projected Student Enrollment (Table)</u> Want to better understand the relationship with Alliance Education Services - is this a CMO? Where is their fee in the budget? - kakadelis1</p> <p><u>Weighted Lottery</u> N/A - shannon_stein</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> What research was conducted to determine if the mile radius and target population would utilize the provided transportation? - jessica.kelly</p> <p><u>Transportation Plan</u> Why will transportation only be provided within a 5 mile radius? Is this sufficient? - marylynn_kroeger</p> <p><u>School Lunch Plan</u> Where will the students eat lunch? Will the facility include a cafeteria?</p> <p>Will the school provide lunch for students who do not qualify for free/reduced lunch but fail to bring a lunch to school?</p> <p>Who will be assigned to operate the school's lunch program? - lstein692</p> <p><u>Facility and Facility Contingency Plan</u> Why is there a need to create a brand new school, when most of the proposed program is already happening at traditional public schools? - jade1124</p>



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	<p><u>Facility and Facility Contingency Plan</u> Will the use of the modular classrooms/spaces hinder the STEM curriculum? - jessica.kelly</p>
<p><b>Financial Plan</b></p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Not realistic. - jade1124</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> first year enrollment aggressive - joseph_maimone</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Not realistic. - jade1124</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Further elaboration is needed on the agreement with Building Hope (Appendix M). - craig_tucker</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Are the other funds from the Building Hope loan? Is this loan necessary or will it cause more unneeded debt? - jessica.kelly</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Concerned about projected revenues based on aggressive enrollment Explain \$200,000 "Other funds" - marylynn_kroeger</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> High lead admin salary.</p> <p>This indicates \$40,000 as core content salary but earlier in application you stated \$42,000. Will all staff be hired at the \$40,000 range and have no salary increase? - jessica.kelly</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Teacher salaries at \$40,000 seem low. - marylynn_kroeger</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What is the professional contract for tuition and fees for? - jade1124</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Is the tuition and fees line item included to support continuing education activities for staff? Please elaborate. - craig_tucker</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Does the budget provide sufficient funds for contracts with related service providers? - robert_mcouat1</p>
<p><b>OVERALL</b></p>	<p><u>Cover Page</u> Why does the applicant state that the application is a replication of the one used by Mallard Creek STEM Academy, but when asked if this is a replication of a current charter school model the response is "no." - lstein692</p> <p><u>Cover Page</u> Applicant states that "to that end, this application is a replication in the spirit of that extremely successful school by its board." Though the applicant selected "no", is this a replication? - craig_tucker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u></p>

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	<p>Why are the enrollment numbers so high for a brand new school? The enrollment goals are not realistic. - jade1124</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> High enrollment numbers for year 1. Explanation needed. - jessica.kelly</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Is starting with 7 grades optimal, especially when one is at a different level (I.e. MS)? - shannon_stein</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> large first year, convince us how you can meet target? - joseph_maimone</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Will the area handle this enrollment? - dswalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Concerned about meeting enrollment target - marylynn_kroeger</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Lofty enrollment goals and many grade levels to start - heather_soja</p>
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<b>Charter School Advisory Board Subcommittee</b>	
<p><b>Mission, Purposes, and Goals</b></p>	<p>Mr. Quigley led the interview and reviewed each section of the application. Mr. Maimone asked about student numbers in the Steel Creek area. He specifically asked them to provide convincing information to be able to confirm that they could enroll 500 students in year one. Additionally, the goals outlined in the application were confusing (Grow +15% higher than the LEA). The partnerships identified were a plus. Mr. Walker asked how many board members were the same as Mallard Creek STEM. Ms. Reeves responded that were the same board. The question was around how they are going to be able to meet growth in math while opening a school at the same time.</p> <p>Mr. Quigley wanted to know why the school did not check replication on the application. Ms. Turner responded that Mallard Creek STEM has not been open long enough to officially replicate (schools must have 3 years of data).</p> <p>Mr. Quigley directed questions to the board and opened questioning with the projected student enrollment. The Board responded that when they opened Mallard Creek last year in a similar area and with similar demographic they met enrollment targets (they had a 200 waitlist, 800 applicants for 140 spots) so they felt confident they would be able to reach the projected enrollment. This school would be southwest of Charlotte. Mr. Walker clarified if there would be any crossover between the two schools when getting applicants/enrollment. The Board responded that the schools are 30 minutes apart and that they would not be competing for enrollment. There was already a buzz in the area.</p> <p>Mr. Walker wanted to know the grade breakdown in first year. Specifically, the board projected less 6th graders entering than in other grade levels. He wanted to know the reasoning behind that strategy. The board responded that when you create a unique school like this, the culture was a unique component than compared to a Traditional Public School. There were benefits from having more students in K-5, such as planting the</p>

	<p>culture seed, and other implications with specials/electives that would benefit from having a smaller middle school to start.</p> <p>Mr. Quigley asked about another charter school in the same area that was recently approved by the CSAB and wanted to clarify whether the proposed board was concerned. Ms. Reeves asked about the closest charters. Unity classical was 6 miles from one of the proposed locations. There were 3 charters near where the school was proposing to locate.</p> <p>Mr. Maimone wanted to know if there was a relationship with another school (recommended in this round for approval) and if there was a chance the schools would open right down the street from each other. The board responded that there was no concern.</p> <p>Mr. Walker wanted clarification around the growth goal (15%). He specifically wanted to know if the 15% was tied to growth or proficiency. The proposed board responded that the 15% represented growth over time. The goal was to be 15% higher than the LEA. Mr. Quigley asked if Mallard Creek was 15% higher than the LEA. The board responded no. Mr. Quigley asked if this was a goal for Mallard Creek (the replicated school). The board responded yes.</p> <p>Mr. Walker asked if Mallard Creek had the same relationships with the local college. The board stated that the teachers received professional development throughout the school year (ongoing off site and on site), and they have access to resources through this relationship.</p>
<p><b>Education Plan</b></p>	<p>Ms. Reeves wanted the board to expand upon the extended learning program outlined in the Education Plan.</p> <p>Mr. Maimone wanted clarification on what the marketing "hook" was going to be and how the school would differentiate itself from other schools with similar names in the area. Specifically, why would students come to Steele Creek STEM.</p> <p>Ms. Vuncannon wanted to know what would STEM across the curriculum look like, aside from extracurricular clubs and add-ons to class.</p> <p>The board attributed Mallard Creek (replicated school) not meeting growth in math to the variety of students they received during its first operating year. Mr. Walker commented that the school focus was so much on STEM that there should be growth potential in math. Mr. Quigley stated that the school seemed heavily focused on developing literature, and sought clarification on what they were doing to improve instruction and student growth in math.</p>
<p><b>Governance and Capacity</b></p>	<p>Ms. Turner had concerns and questions about capacity of the board. Mr. Walker dived into the operations and finances and stated that he did not see any assurance for revenues. Also, the food contract was not clear as the budget did not reflect how it was going to work. He also wanted to know about the breakeven number after cuts and the breakeven number without making cuts. Ms. Kroeger wanted an explanation of the 200,000 each year in other revenue. She had concerns that the budget was identical to Mallard Creek initial application given that the school is currently operating and should have adjustments based on its limited operating experience.</p>

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Operations	
<p><b>Financial Plan</b></p>	<p>Ms. Kroeger wanted clarification on some financial aspects outlined in the budget. The board responded that its average budgeted salary was around \$40,000. Ms. Kroeger wanted to know if this was the trend at Mallard Creek. The board responded yes. Ms. Turner sought clarification around teacher salary average especially since the local LEA starting salary was \$40,000. The board stated they were competitive with the LEA and they scale on the NCDPI salary range.</p> <p>Ms. Reeves wanted an explanation on the large debt service built into the budget. The board responded that since they are building the school, this is a large debt they would be undertaking. Additionally, equipment, furniture, and technology would be a significant debt. Mallard Creek has around \$400,000 in fund balance, and the rough debt is around \$550,000 a year over 5 years. They were anticipating this same debt scale with Steel Creek.</p> <p>Ms. Reeves wanted clarification on the consultant fees. Specifically, what was the fee for student accounting. The board responded there was not a specific line item for student accounting and the consultant fees budgeted would be for services their third-party vendor may provide.</p> <p>Ms. Kroeger asked for clarification around the services for equipment and for the building and whether the company is the same (Building Hope) that was used for Mallard Creek. The board responded that they would conduct an RFP for the final financing. There were three different companies that offer financing for charter schools. There were two different companies that financed Mallard Creek for the schools two phases. The lease was developed based on student enrollment.</p> <p>Ms. Vuncannon asked questions about the 615-projected student enrollment in year one and wanted information on the year one enrollment at Mallard Creek. She outlined the year one enrollment at Mallard Creek was 500. Additionally, what would be the hook that would attract students to your school rather than the other recommended school. The board responded that 6-10 miles between schools was a far distance. Also, the board did not think there was another program like the STEM workshop they provided. Alliance Education Services would provide initial professional development. Ms. Lucas stated they were not a management group, but provided services as needed. Specifically, when and if they needed the support, Alliance Education Services receives payment for services rendered. Ms. Reeves wanted clarity on if Alliance Education Services was currently supporting Mallard Creek. Representatives from Alliance Education Services responded that they currently provide services from time to time. Ms. Reeves specifically asked the board chair about the services he expected to use from Alliance Education Services at the new school. The board responded that this would vary (case by case basis).</p> <p>Mr. Quigley asked how they would only spend \$20,000 on books with the number of students enrolled. The board responded that they do a lot more hands on versus textbooks. They also indicated that there was a large amount of money that encompasses the K-8 reader/writer workshop and LLI texts - FFE&amp;T Debt includes a massive budget.</p> <p>Mr. Maimone commented that the strongest thing this group had for them is that the proposed area is large and growing. Additionally, they would be providing a STEM service that was not widely offered.</p>

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<b>OVERALL</b>	<p>Mr. Maimone made a motion to recommend Steele Creek for Ready to Open status to the State Board of Education. Ms. Gibbs seconded. Mr. Quigley opened the floor for discussion on the motion. Mr. Hawkes was concerned that Mallard Creek does not have a long track record and was wondering if this decision is a little premature. Mr. Walker agreed with Mr. Hawkes sentiments after pulling up the school report card (12% EDS, 59% EOG math score and not meeting growth). Steele Creek elementary a traditional public school in the area (75.4% EDS, 70 in math, met growth). Mr. Walker wonders if they were going too quick, but if they take the vote right now, he would vote against the motion. Mr. Quigley voiced similar concerns and stated that this seems early in the timeline of development for replication, though the school has a good plan and good expertise on their board, its hard to step back and look at a school operating in one year (did not meet growth and a C school).</p> <p>Ms. Turner responded that the size of the proposed school was concerning for a school that is only a year old, that makes starting another large school harder to accomplish. Mr. Maimone stated that they were providing a quality service and they were planning to open in a growing and developing area. Mr. Walker commented that the plan and board was good and if they were voting on the strength of the application alone, he will support the motion. Mr. Turner stated that the schools name needed an amendment.</p> <p>Mr. Walker made an alternate motion to amend the earlier motion to include a stipulation that the school change the name to not include the words Steele and Creek. Ms. Gibbs seconded. The motion passed unanimously (9 0).</p> <p>* Mr. Hawkes commented that there was a great need in the area which was the reason he supported the motion. Also, he communicated that the CSAB had to conduct its due diligence of this board to scrutinize this application, he hoped this vote was a charge to the proposed school to really do this right.</p>
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### Overall Summary

<b>Initial Screening</b>  <b>09/27/2017</b>	<p>The Office of Charter Schools deemed this application complete on September 27, 2017. No further information is needed to begin the application evaluation.</p>
<b>Application Review</b>	<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. Additionally, the pass/fail ratings from the application rubric were shared. Assistance for this application was provided with Alliance Education Services.</p> <p>Mr. Maimone led the discussion with the Performance Committees review of the application. Mrs. Kakedelis wanted clarification as to why this school was not a replication of Mallard Creek. Mr. Maimone sought clarification around the enrollment numbers, especially within the first year of operation. Mrs. Reeves sought clarification around the measurement of goals. Additionally, she asked whether they would share board members with Mallard Creek Stem.</p> <p>Mr. Quigley asked if there were any shared board members. The Board responded that</p>

	<p>they are the exact same board. Mr. Quigley asked clarification on the exact replication. The Board responded that the decision was based around the 3-year stipulation in the replication requirements and noted that Mallard Creek Stem has not been operating for 3-years.</p> <p>Mr. Quigley asked how they can get those enrollment numbers projected in the application. The Board responded that it is one of the fastest growing zip codes. There is a public school that has a partial school that is magnet and STEM, but has been very limiting with regards to getting students into the STEM program of the school and has become a relief to overcrowding.</p> <p>Mr. Quigley inquired on the waitlist at Mallard Creek and clarified what is the distance. Ms. Turner responded that it is a 30-minute drive. The Board responded that they have 430 on the waitlist. Mr. Quigley asked whether the Board was aware that Charter Schools USA has an application for a school named Steele Creek. The Board responded that they were not aware.</p> <p>Mr. Quigley asked what data or survey data the school can provide an evidence of the need. The Board responded that they conducted a Google survey through which over 100 people completed. Additionally, school choice is a big issue in that community.</p> <p>Mr. Maimone commented that since they invited the other Steele Creek back for an interview, it will be interesting and quite the challenge to see how they will provide program for students in that area and whether there will be competition.</p> <p>Mr. Maimone made a motion for the Performance Committee to recommend to the full CSAB that they invite Steele Creek Stem Academy for a full interview. Mrs. Reeves seconded. The motion passed unanimously in the Performance Committee.</p> <p>Mr. Quigley made a motion on behalf of the Performance Committee to the full board to invite Steele Creek Stem Academy to full interview. Mr. Walker seconded. The motion passed unanimously.</p> <p>Ms. Turner suggested that they bring survey data as those numbers are going to be very important. Mr. Maimone requests that they also have idea of where they will locate.</p>
<p><b>Application Interview</b></p>	<p>OCS gave an overview of the applicant, proposed enrollment for the first five (5) years, proposed county, whether the applicant had an LEA impact statement and/or due diligence, and pass/fail ratings on the application. Assistance was provided by Alliance Education Services; no fee was paid to the third party for that service.</p> <p>The members of the Board introduced themselves to the CSAB. The board of Mallard Creek STEM Academy were also board members on this board.</p> <p>Mr. Maimone made a motion to recommend Steele Creek for Ready to Open status to the State Board of Education. Ms. Gibbs seconded. Mr. Quigley opened the floor for discussion on the motion. Mr. Hawkes was concerned that Mallard Creek does not have a long track record and was wondering if this decision is a little premature. Mr. Walker agreed with Mr. Hawkes sentiments after pulling up the school report card (12% EDS, 59% EOG math score and not meeting growth). Steele Creek elementary a traditional public school in the area (75.4% EDS, 70 in math, met growth). Mr. Walker wonders if they were going too quick, but if they take the vote right now, he would vote against the</p>

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