

Application Preliminary Evaluation Packet

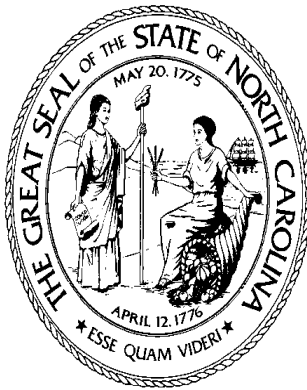
For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § 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:

Joe Maimone
Tammi Sutton
Jay Whalen
Danielle Allen
Bruce Friend
Alex Quigley
Shannon Sellers
Lindalyn Kakadelis
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Sally Houston
Shannon Sellers
Shannon Stein
Sherry Reeves
Stephenie Clark
Jessica Kelly

Date of Review:



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Bermuda Run STEM Academy

Public charter schools opening the fall of 2020

Due by 5:00 pm, October 1, 2018

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
2018 Application Process
To open a charter school in the 2020-2021 school year

APPLICATION DUE DATE/TIME

October 1, 2018 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 October 1, 2018 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

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

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Bermuda Run STEM Academy

X

Name of Municipality under which charter will be organized or operated:

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

Name of non-profit organization under which charter will be organized or operated: *Bermuda Run STEM Academy, Inc.*

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

Name of contact person: *Linda Petrou*

Title/Relationship to to nonprofitMunicipality: *Board Chair*

*Mailing address: 1324 Berwick Rd.
Winston-Salem NC 27103
Primary telephone: 336-287-6405 Alternative telephone: 704-236-1234
E-Mail address: lindapetrou@gmail.com*

*Name of county and local education agency (LEA) in which charter school will reside:
County: DAVIE
LEA: 300-Davie County 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.

Alliance Education Services, INC. a non-profit charter support and consulting firm assisted with the submission of this charter school applications. Upon approval of this application, 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:

The State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high quality charter schools. In considering whether to accelerate the planning year, the applicant must meet the following requirements:

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

Demonstrate an exceptional need for the charter school in the proposed location

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

Yes:

No:

Is a facility identified by the applicant that is feasible for opening on an accelerated schedule.

Yes:

No:

Demonstrate that the facility identified by the applicant is feasible for opening on an accelerated schedule.

Attach Appendix A1 to demonstrate you have a facility secured for opening on an accelerated schedule.

Once evidence for the requirements has been verified, the State Board will also consider the presence or absence of the following factors in making its determination:

- 1. Unique mission and educational program.*
- 2. Local, state, and national nonprofit partnerships committed to assisting the school.*
- 3. Potential for economic and educational development of the region.*
- 4. Mentoring by a successful organization that has experience in creating public schools.*

5. *Obstacles to educational reform efforts that leave chartering as an available option.*
6. *Commitment to work with a successful charter school board as a guiding mentor.*
7. *The length of time the board of directors has existed.*
8. *Whether the proposed board has previously or currently operates a successful public charter school.*

The above list is not exclusive or controlling and is intended to guide the exercise of the State Board's discretion. An applicant requesting acceleration must submit the request to the State Board of Education prior to the application due date for consideration.

In order to qualify for designation as an "alternative school" for purposes of accountability under this policy, the charter school must demonstrate that it serves a student population as follows:

1. *The school must include grades 9-12.*
2. *At least 75% of the school's population in grades 9-12 must be at-risk of academic failure as defined in GCS-Q-001, I.B, and must also meet one or more of the following indicators:*
 - a. *The student must either be recently released from a juvenile justice facility, or otherwise be subject to and participating in the juvenile justice court process;*
 - b. *The student must be currently served by a treatment facility licensed pursuant to Chapter 122C of the General Statutes, or have recently been discharged from such a facility;*
 - c. *The student must be currently under long-term suspension from a public or private school ; or*
 - d. *The student must be a high-school dropout as defined in GCS-Q-001; or be imminently at risk of dropping out as demonstrated by adequate documentation in the charter school's application for designation under this policy.*

Yes:

No:

A charter school meeting the eligibility criteria set forth in this policy and seeking designation as an "alternative school" must submit an application to the Office of Charter Schools describing in detail the school's mission as it relates to the request for designation; the criteria the school plans to use that will meet the eligibility requirements set forth above, including the documentation the school will use to support its admissions process; how the school intends to serve the select population, educationally and otherwise; and the goals the school is setting for academic achievement for this population. The application must also include an admission plan that is well-defined and specifically limited to serving at-risk students as described in the application. A plan that is not well-defined will not be approved.

The School must, in its application, designate which of the alternative accountability options it is requesting under GCS-C-038. The option selected, if approved, cannot be changed except at the time of renewal.

What is the name of the nonprofit organization that governs this charter school? Bermuda Run STEM Academy, Inc.

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2020

Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K, 01, 02, 03, 04, 05, 06	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. Additionally, the board is aware that if this application is approved by the State Board of Education, the approval is contingent upon successful completion of such planning year.

clemmonsforsyth

Signature

Board Chair

Title

clemmonsforsyth

Printed Name

10/01/2018

Date

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

<u>Reviewer</u>	<u>Score</u>
<u>Joe Maimone</u>	
<u>Tammi Sutton</u>	
<u>Jay Whalen</u>	<u>Pass</u>
<u>Danielle Allen</u>	
<u>Bruce Friend</u>	
<u>Alex Quigley</u>	
<u>Shannon Sellers</u>	
<u>Lindalyn Kakadelis</u>	
<u>Phyllis Gibbs</u>	
<u>Robert McQuat</u>	
<u>Sally Houston</u>	<u>Pass</u>
<u>Shannon Sellers</u>	<u>Pass</u>
<u>Shannon Stein</u>	<u>Pass</u>
<u>Sherry Reeves</u>	
<u>Stephenie Clark</u>	
<u>Jessica Kelly</u>	<u>Pass</u>

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

Clearly describe the mission of the proposed charter school:

The STEM initiative will drive student engagement and creativity that will result in increased academic achievement. Bermuda Run STEM Academy will provide students with a creative and challenging student-centered learning environment that focuses on science, technology, engineering, and math (STEM), implemented throughout K-8th grade and a strong, leadership model that will encourage and enable students to become globally competitive.

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.*

Davie County, NC has grown in the past 10 years and growth is expected to increase in this area as well as the areas surrounding it including Davidson, Clemmons, and Mocksville. Some of these towns have grown between 4-16% in the past ten years. The specific area targeted for this School is in the town of Bermuda Run. Bermuda Run is situated just off Interstate 40 on the eastern end of Davie County. Davie County is in western Piedmont North Carolina. It is surrounded by Yadkin County to the north, Forsyth County to the northeast, Davidson County to the east, and Rowan County to the south. Three of these 4 counties do not have any charter schools of choice. Although Forsyth County does have charter schools, we believe this School in Bermuda Run will serve families in all 4 areas, including those as far as Winston Salem inside Forsyth County. This School is supported by the town of Bermuda Run, as demonstrated in the letter attached to this application and designed to provide a unique educational choice. The Board primarily resides in this greater Piedmont area and hopes that this School will draw families from the adjacent counties to provide more educational choice for these diverse families.

Our School expects for the student enrollment to mirror that of the Piedmont

region. Of these areas, some have predominantly more diversity than others and some have more families that are economically disadvantaged. Although we will not have a weighted application, the Board intends to actively draw a diverse student body. This School is designed to replicate a "magnet model" to attract a diverse community of learners with equal access to academic rigor, technology-infused instruction and leadership opportunities in academics, service, and athletics. Our school intends to serve all students and will provide a National School Lunch Program, bus transportation, early and aftercare with an extended learning program and a full school implementation of NC MTSS to ensure success for all students to eliminate any barriers to entry or success. Land for this School has already been secured and architectural designs are already completed that show the School's intended use of the property to serve the greater community. The Board is excited about the opportunity to share the fields and school property with the surrounding residential area. The expected demographics, therefore, is a balance of the 4 counties the School strives to serve.

White 60%
Black 30%
Hispanic 10%
ELL: 12%
EDS: 35%

Many students located in Bermuda Run and surrounding area travel over 35 minutes into Winston Salem to attend a private school to find a "choice" option. Other students from adjacent counties travel out of their county to attend a charter school farther away or attend private and home schools. Additionally, many of the elementary and middle schools within 8-10 miles are larger membership schools. This Board believes that a K-8th-grade school with a target capacity in 5 years of 798 provides students a comprehensive school program with extracurriculars and sports without becoming so large that a child becomes lost in the crowd. A K-8 magnet model with an embedded Leader in Me also provides families a feeling of partnership in their child's education.

- 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).*

The total projected enrollment will be 798 which is approximately 13% of the Davie County LEA. Please note that the School expects its student enrollment to come from Davie, Forsyth, and Davidson counties.

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

We believe this unique model that strives for academic excellence and student leaders will serve this community well and provide our families with the opportunity to experience a 10-year continuum of STEM engagement through Project Lead The Way. The Schools commitment is to provide the highest quality education for our diverse population of students to increase student performance and close achievement gaps. The School will be unique to the

area as the FIRST and ONLY school of choice in the county, providing an option for families looking for a rigorous K-8th grade STEM program. In addition to the STEM initiative, other unique aspects of the school will include applied technologies, cross-curricular projects, extracurricular STEM enrichment opportunities, and a sports program. The mastery of these grade level expectations will be evident in student performance on end of year exams and measured through the NC Accountability model. Student mastery of our expectations will also be evidenced by student performance on completed projects, builds, competitions, and community partnered activities. The School sets high academic and social expectations that together lead to the successful development of the whole child and creates lifelong learners prepared to contribute in an ever-changing society. In doing so, the School recognizes that each student is capable of learning and achieving academic success and therefore is committed to developing student intellectual potential while reinforcing personal character and sparking a lifelong learner. This is in perfect concert with the School's mission and highlights our commitment to fulfilling it. The School's educational philosophy is grounded on the expectation of increasing learning opportunities and raising the academic achievement of its students through high expectations and character development. The intent of this school and the model of instruction and leadership is designed to provide a socially and academically successful program that is deeply ingrained in leadership, service, and rigor. The Leader in Me program is selected to develop a climate that cultivates service to one another, leadership opportunities for all students and a spirit of community. The Leader in Me will create a climate and culture committed to leadership and service. We will partner with parents to support the STEM initiative, develop student character, and strengthen our community partnerships by educating and encouraging them to participate in school-based academic events. It creates a student-centered model, that naturally differentiates learning, and demands engagement. Students are challenged to learn and apply the breadth and depth of content and skill sets across the disciplines through reality-based projects, using up-to-date research from the fields. Students are asked to perpetually evaluate their points of interest, experiences, and talents with ongoing portfolio development. The benefits of a well-articulated STEM program include: engagement; application of knowledge; collaboration and communication; problem-solving skills; embedded differentiation; increased learning relevance, allows for more meaningful projects, will help to foster community partnerships, and promotes a student-centered learning environment. Providing a rich and rigorous STEM K-8th grade program through Project Lead The Way will provide our students with every opportunity to be successful in the globally competitive world they are entering. The School's Educational Plan is to prepare our students to be responsible, caring, and productive members of an ever-changing and globally demanding society.

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.*

(1. and 6.)

As a STEM-based school, students will certainly have expanded choices in their educational opportunity. But in order for this model to work, we must also focus on the staff. Our teachers will have a unique opportunity to apply innovative instructional strategies, curriculum, and teaching methods. All staff will be provided with intensive professional development to help them implement focused projects and activities tied to the standards in science, technology, engineering, and mathematics specifically those tied to the Project Lead The Way modules. Although we have a certain number of teachers certified to teach PTLW, all teachers will incorporate the STEM content. Teachers will also have the opportunity to include School partner experts in their PLC groups to deepen lesson planning, instructional practices, and reflection as well as foster the flow of information between the multiple parties. Expert teachers in STEM disciplines, Technology, and Engineering, in particular, will assist classroom teachers to implement the supplemental curricular pieces to ensure the fidelity of the program. The Project Lead The Way program will be implemented for all students from Kindergarten through 8th grade which will help them build their skills in problem-solving, critical thinking, design and modeling and applying their knowledge to demonstrate mastery. The modules are created to align with grade-level standards of the NCSCOS and to enrich the core content subject areas.

The School will generate an opportunity for teachers to participate in an exciting and innovative venture; one that allows them to take ownership over the learning process, and flex their individual autonomy while incorporating their unique teaching styles into the classroom. In order to best utilize research-based strategies and implement the school programs, all teaching staff will receive ongoing professional development on the various components of the programs, respectively, to ensure effective implementation. All teachers will use a blended model of delivery that includes a component of direct and explicit instruction with time for shared and group practice through hands-on activities and projects. Units will culminate with both formative and summative individual assessments being employed to measure students level of mastery regarding the targeted content knowledge and skills. Teachers will be provided with initial and ongoing

feedback regarding the curriculum, the delivery model, the STEM initiative, and PLTW.

A full implementation of Leader In Me is also integral to developing a climate and culture in the School in which all stakeholders feel like "leaders" and are committed to the program's success. The intensive training in Leader in Me will help this school develop a strong sense of community and a culture committed to "do the right thing" at all times. By allowing teachers the opportunity to have some choice regarding their professional development offerings a positive school culture is created, where teachers feel respected and have a sense of ownership pride. The Leader In Me program provides a process for teachers and administration to celebrate student leadership and for staff to model appropriate behavior. Monthly assemblies will celebrate academic success and character development based on 7 Habits of highly successful students. A "lighthouse Team" will be created that is comprised of teachers as leaders who will have the opportunity to shape the program and develop student leaders.

Research demonstrates that PLTW students outperform their peers in school, are better prepared for post-secondary studies and are more likely to consider careers as scientists, technology experts, engineers, mathematicians, health care providers, and researchers compared to their non-PLTW peers. Students find PLTW programs relevant, inspiring, engaging, and foundational to their future success. Studies have shown:

- PLTW contributes to a strong, positive impact on mathematics and science achievement
- PLTW has a positive influence on students career interest and likelihood to continue their education
- PLTW offers a pathway to prepare and motivate students to enter careers in science and engineering
- PLTW high school graduates are nearly three times as likely to major in STEM versus non-PLTW graduates

PLTW students engage in hands-on activities, projects, and problems that are reflective of real-world challenges. This compelling, real-world approach empowers students to learn essential, in-demand skills validated by the worlds leading companies, while also providing an invaluable connection between what students are learning in the classroom today and how it applies to the paths they'll take in the future. (www.pltw.org)

Educators will be prepared to deliver instruction founded on research and best practices to all learners; including students receiving or eligible for EC, AIG, 504, speech and language, and/or ELL services, etc. which will increase student achievement for ALL learners. A teaching staff that has highly developed instructional practices will ultimately serve all students in our School.

(3.) This school will be the first and only charter school in Davie County. It will also serve students from 3 other adjacent counties with no charter schools.

Goals for the Proposed Charter School:

1. *Provide specific and measurable **goals** for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.*

The Board has established a variety of goals in order to measure the success of the overarching program. The Board will meet monthly and the onsite school Principal will present the appropriate reports to the Board. Additional personnel (contracted services) may also present reports, from LINQ, PowerSchool, SAS and other assessment reports will be shared with the Governing Board as they become available at each meeting. Most importantly, each year, the NC Performance Framework will not identify any areas of non-compliance.

Operational:

Student enrollment: 95% of target enrollment. Measured through 20 day ADM and monthly reports

Budget V. Actual Expense: meet 95% budget expectations. Measured monthly in LINQ and yearly audits

Financial Audit: No Management Comments/Concerns Measured each year through an independent auditor.

Parent and Staff Satisfaction: 85% "extremely Satisfied" Measured each year through climate surveys

Student attrition: less than 10% per year by year 3

Academics:

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. Ongoing Progress Monitoring (Interim Progress Reports and Report Cards, M-Class, MTSS data) will be utilized as reflective and guidance tools for cohort and class placement. Specific, Measurable Goals include:

Math and Reading scores will increase by 3% per grade level per year

Science scores will increase by 5% in Year 1 and then 3% each year

The school will "exceed growth" expectations each year.

All students will make at least 1-years worth of academic gain in each core subject measured based on

initial and final benchmarking assessments which will be reported to families

A minimum of 10% increase in the Schools SPG by year 5

85% of students will complete a minimum of 10 service hours each year.

Student data will be reported to parents during progress reports and quarterly report cards. Data charts and parent conferences will also be used to share student progress. The Board will review academic data at monthly Board meetings as available.

Governance:

100% of board members will have a minimum of 10 hours of governance training through the RTO process

80% of Governing Board members will attend the Charter Leadership Institute conference in Years 1 or 2

100% of new Board members will receive on boarding training as staggered terms expire

A minimum of 10 meetings will occur each year

All data and compliance measure will be shared monthly at the Board meetings, in Leadership team meetings, in School Improvement Team meetings and in an annual report that will be shared with faculty and families. A yearly School Improvement Plan will address yearly goals and progress. Financial reports will be shared each month as provided through LINQ and the audit will be provided yearly.

Climate Surveys will be distributed and analyzed in the Spring and shared during SIT meetings and Board meetings. The NC Performance Framework will be shared each year and/or as available to demonstrate compliance in all these areas.

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

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 school's 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 increased proficiency in the College and Careers Readiness scores in the NC Accountability model

3. socially engaged as demonstrated by their community awareness and commitment to the Leader In Me.

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 Board has established itself in an effort to provide a unique educational opportunity that promotes high academic achievement by providing an interdisciplinary curriculum taught through a pervasive workshop model that is cost effective and highly successful. The School has also secured resources and contacts to provide all students with a focused STEM component through technology, field experts and specialized curricular resources as indicated in the budget.

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 reporting. Each year the Governing Board will revenue 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, behavior referrals, and staff retention rates (including SAR).

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
What evidence other than growth in the county is there to show the need for the school. Were surveys given to parents?	Shannon Sellers	Educational
Drawing students from Winston-Salem is far. How will transportation not be a barrier for those students? How will you actively recruit and market to draw such a diverse student body? More evidence besides school performance is needed to prove a need and desire for this school in the community, especially given the aggressive enrollment targets?	Jay Whalen	Educational
How does the board intend to actively draw a diverse student body as stated?	Jessica Kelly	Educational
The goal to exceed growth expectations is very lofty; is that reasonable in the beginning of the schools inception? Should it be "meets or exceeds"? Will there be enough data and compliance measures to share every month at the Board meeting?	Shannon Stein	Goals for th
Is exceeding growth a realistic goal for each year? Please clarify.	Jessica Kelly	Goals for th
The goal to "exceed growth" each year is lofty. For the first couple of years, would it be more realistic to "meet growth?"	Shannon Sellers	Goals for th
While it's exciting to see professional development goals for board members, have you considered professional development goals for teachers given their daily impact on student achievement?	Sally Houston	Goals for th
What is the process to asses or revise goals? How did you come to the 3% increases each year as proficiency goals? Is that rigorous enough? How is the student service hour goals supported by the educational plan?	Jay Whalen	Goals for th

Reviewer	Score
Joe Maimone	
Jessica Kelly	Pass
Jay Whalen	Pass
Danielle Allen	
Bruce Friend	
Alex Quigley	
Shannon Sellers	
Lindalyn Kakadelis	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Shannon Sellers	Pass
Sally Houston	Pass
Robert McOuat	
Phyllis Gibbs	

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, inquiry-based 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 STEM program. 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. We believe that a STEM program is the best way to accomplish this task, based on the current global educational climate. "In the 21st century, scientific and technological innovations have become increasingly important as we face the benefits and challenges of both globalization and a knowledge-based economy. To succeed in this new information-based and highly technological society, students need to develop their capabilities in the STEM to levels much beyond what was considered acceptable in the past" (National Science Board, 2007). STEM education helps to bridge the ethnic and gender gaps sometimes found in math and science fields. The School will actively pursue teaching candidates with experience or interest in promoting a STEM initiative to promote fidelity to the core academic program and purposefully designed elective offerings. High-quality curriculum materials and the latest technologies will be used towards the achievement of this goal. Mastery of the NC Standards through Project-Based Learning and the use of technology-infused instruction for a STEM program will be the main focus. The School incorporates highly engaging and research-based interdisciplinary STEM units such as Project Lead the Way across the grade levels. Project Lead the Ways Launch (K-5 units) and Gateway (6-8 units) will "immerse students in hands-on activities, projects, and problems that build upon each other and related to the world around them. The program creates an integrated learning experience, blending computer science, engineering, biomedical science, and more" (Project Lead the Way, 2016).

Students will experience a variety of engaging learning formats such as direct instruction/lecture, collaborative groups, problem-solving activities, technology-infused videos and modules, expert guest speakers,

instructional field trips, experiential education, and examination of high level and related text selections. Students will be provided with access to technology-based instruction, engineering design process thinking, labs, technology, robotics, coding experience, math manipulatives, and a variety of other materials and hands-on learning opportunities. This integrated approach allows students not only to learn but also, more importantly, to apply the required benchmarks in real-world situations. Real-world application increases the relevancy of the learning experience and enhances critical-thinking and decision making.

STEM literacy will be used as an interdisciplinary area of study to bridge the core content areas of science, technology, engineering, and mathematics. By integrating STEM lessons throughout the curriculum, students will learn and be able to apply an understanding of how the world works within and across these interrelated domains. A STEM model ensures a new workforce of problem-solvers, innovators, environmental stewards, and collaborative inventors who are self-reliant and able to succeed in the knowledge-based workplace and community.

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.

A STEM classroom shifts students away from traditional, content specific, pieces of information and rote procedures towards a more integrated approach that includes investigating and questioning the interrelated facets of the world. An example of how the standard curriculum might be augmented in a STEM classroom is the teacher posing a problem and then requiring students to do original research inspired by a class-wide inquiry project, where they must use technology to gather and analyze information, design and test a model solution, collect data, provide peer feedback to improve upon a proposed solution, self-reflect and then present their conclusions and finished products/projects to a wider audience comprised of peers, staff, parents and community members. Opportunities for student choice and learning extensions would be provided as appropriate.

A standards-based curriculum infusing a thematic approach to integrate core areas of study such as mathematics, reading, language arts, writing, science, social studies with a purposeful inclusion of engineering and design in all grade levels

A state adopted Core Reading Program that is aligned to current standards in reading and provide appropriate professional development to build professional capacity;

Appropriate assessments for evaluation (screening, progress monitoring, and diagnostics);

Full implementation of PLTW

Data-driven, differentiated instruction

Supplemental programs for student advancement and remediation;

After school tutoring for at-risk students

A STEM based aftercare enrichment program

Support for teachers through ongoing, targeted professional development

Embedded in the framework is a system to establish well-balanced teams among educators and students based on a variety of characteristics. All classes will be taught by certified personnel and will be designed to maximize space for learning with a gathering area, collaborative work tables or pods and teacher stations. All classes will be equipped with technology to provide teachers the opportunity to embed technology into instruction. Classrooms will be uniquely designed to serve students in a collaborative, team environment including a "gathering area" for younger students with work tables, and specialized mobile desk units for older students which can be moved around in a fluid manner to allow for individual, partner and group work in a matter of seconds. This design will promote and support a progressive, technology-enhanced and project-based model of instructional delivery. 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.

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 school's 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 School's mission and vision. Houghton Mifflin Harcourt Journeys and Collections curriculum will help provide a framework for teachers to scaffold literacy instruction and provide best practices in reading while incorporating and integrating authentic literature. The selection of these programs is intended to integrate "Texts worthy of instruction allow readers to reflect on themselves and their actions; invite them in the worlds of others; understand the biological, social, or physical world; or solve problems that are timely and important. Texts worth of instruction also allow students to develop their literary prowess and become informed citizens" (Fisher & Frey, 2012, p.2). The balanced literacy approach allows the teacher to tailor the literacy block(s) in ways that best meet the needs of students and ever-increasing, higher level expectations and standards in reading and writing. The School

will provide the curriculum needed to promote and support interdisciplinary instruction in reading, writing, and math, and STEM to improve student performance:

*All grade level text materials required for ELA as part of the Houghton Mifflin Harcourt Journeys and Collections reading program and supplementary trade books/ guided reading books, grades K-8. The program and text sets satisfy the requirements for all genres and achievement levels in Reading and Writing at every grade level (sample included in an appendix)

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

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

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.1, 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 math, 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

* Project Lead the Ways Launch (K-5 units) and Gateway (6-8 units) will "immerse students in hands-on activities, projects, and problems that build upon each other and related to the world around them. The program creates an integrated learning experience, blending computer science, engineering, biomedical science, and more" (Project Lead the Way, 2016).

Social Studies and Science literacy will be taught through high interest, non-fiction based leveled readers, novel studies, news articles and journals. A list of the Project Lead The Way modules and a full K-8 Scope and Sequence are included in Allendix 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.*

The School will use innovative teaching strategies and methods through an interdisciplinary and inquiry-based 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. Interdisciplinary and inquiry-based models 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 interdisciplinary and inquiry-based approach to teaching will help students become proficient and avid readers, expressive writers, and critical thinkers. Students will have protected blocks of time for instruction and application.

Direct Instruction (Lecturing/Modeling) - This methodology will be used when teachers need to explain or demonstrate specific content and skills. Purposeful and sySTEMatic instruction will be based on Floridas Standards. This instruction is structured in a way to foster student content mastery. Frequent curriculum-based assessments will help to place students in ability groups for further differentiated strategies and identify students who require additional intervention.

Interdisciplinary Connections - Curricular decisions will be guided by a goal of student mastery and achievement, rather than by an effort merely to cover content. As teachers build on interdisciplinary connections, students naturally begin to merge information between and among courses, increasing the relevancy of skills and content in such courses.

Cooperative Learning Teachers will guide small-group learning, to increase communication, collaboration, and team-building skills. It is based upon a flexible small team grouping of students. Groupings may be heterogeneous or homogeneous, in relation to ability, gender, interests, etc The type of grouping will be based upon the desired lesson outcome, as dictated by best practices and the educator. Some Cooperative learning activities will include Jigsaw II, Peer/Buddy Reading, Think/Pair/Share, Group Inquiry Discussions, Team Projects, etc.

Differentiated and Standards-Based Instruction The Schools ultimate goal is to provide a learning environment that will maximize the potential for student success. Teachers will use differentiated instructional strategies in order to connect and support individual learning needs. Teachers will manage instructional time to meet the standards while providing motivating, rigorous, and meaningful experiences for students. Open-ended STEM activities will be utilized as often as appropriate, since they naturally differentiate and tailor to different learner levels.

Scaffolding - Teachers will identify the current developmental skills of individual students based on assessments and provide support structures to help students move to the next level. As the year goes on, the student becomes more adept at skills and at directing their learning, and learning becomes more autonomous.

Additional Supports - Students identified as not meeting grade level expectations or making adequate progress will have additional core instructional time. They will also receive intervention supports through a protected block in the master schedule designed to provide Tier II and III levels of support. Student data and progress will be shared with parents in a timely manner in order to establish an ongoing school/home partnership of student support.

Assessments used to measure a students initial level of performance and ongoing progress will include: ongoing progress monitoring

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, NC-Check-ins, 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 student's independent mastery of reading and writing.

* Student grades should reflect academic achievement.

* While attendance and behavior may influence a student's learning, they should be reported separately, not included in the student's grade.

* Teachers should compare each student's performance against pre-set standards, not against the performance of other students.

* For missing work, teachers should provide reasonable opportunities to complete the make-up assignment(s) in order to demonstrate the targeted learning

* Teachers should provide students and their parents with a clear explanation of their grading practices including the weighting of formative and summative assessments and rubrics as appropriate.

* All assessments and assignments, including teacher-made tests, should be aligned with the NC Standard Course of Study

Teachers use the results of on-going assessments to determine a student's present level of performance and in relation to the mastery of grade level content. Report cards provide meaningful and relevant information, detailing each student social/emotional and academic development.

Each student receiving exceptional children's services will receive an assessment of the student's progress toward goals on the student's Individual Education Plan (IEP) at the end of each grading period, including whether the student is likely to reach IEP goals by the end of the school year. The student's IEP shall state how the child's parent/guardian will receive this assessment.

The progress of students will be monitored at each grade level to determine appropriate grade assignment. Promotion standards are based on the belief that students must perform at grade level or above to be successful in school.

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 proposed mission and education plan.*

We will follow a calendar similar to the draft included which is closely aligned to the Davie County Schools operating calendar. The School 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 185 instructional days. Each school day will run approximately 7 hours with approximately 380 instructional minutes per day. 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.

The operational calendar will include up to 22 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. Certified trained experts from Project Lead the Way via private training sessions, conferences, and participation in PLC for PLTW programs.
2. Intensive Training in Leader In Me for a minimum of 3 days before the School opens and then ongoing during the year
3. Internal and External PD related to the core curriculum, MTSS and data-driven instruction, and other PD deemed relevant from Leadership.

Total Number of Instructional Days: 185 Days
Total Number of Work Days: 12 Days
Total Number of Holidays: 10 Days

Special Programs and "At-Risk" Students

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

All students will participate in school and state assessments, including but not limited to curriculum unit tests, M-Class Reading Assessments, NC Check-ins, End of Grade Tests and End of Course Tests when appropriate. 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 and/or demonstrate more than one year's growth within achievement levels as indicated by the developmental scale scores of assessments. The School will have an MTSS team to support at-risk students through 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 School will implement a system of feedback based on assessments to measure student learning, identify areas of needs and provide additional opportunities for learning through additional time, additional

resources, additional teaching methods, and supplemental supports. If a teacher has a struggling student, a Child Study Team will meet (including teachers, parent, admin) to discuss a formal plan.

Tier 1: Core, Universal Instruction & Supports - General academic and behavioral instruction and support provided to all students in all settings. The master schedule will be designed to provide protected instructional time in each core subject and time for hands-on learning and practice for all students.

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 to be 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. 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 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 Teacher, and assigned homeroom teacher of record.

The school will employ specific instructional programs, such as Houghton Mifflin Harcourts On Our Way to English curriculum, Journeys and ACCESS English resources, practices, and strategies to ensure academic success and equitable access to the core academic program. An ELL endorsed teacher will provide student support and 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
- * Picture cards and Illustrated Dictionaries
- *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. 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.

All ELL students will be fully included with their peers in the classroom and have equal access to all materials as well as support materials.

The Child Study Team (including parent and ELL teacher) as described for students failing to make academic progress will be used to monitor the progress of the ELL students. An ELL Teacher will provide other 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 the student maintains. It further identifies the type of help needed to equip the student with the ability to 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. The WIDA assessment is also used to measure growth and target exiting criteria.

ELL students who continue to make academic gains and show a minimum of "basic" proficiency performance levels on NC EOGs shall meet the criteria to begin exiting the student from the ELL program. The CST Team (including the ELL Teacher) shall convene with the parents to discuss exit plans and future support strategies for the student as appropriate to support ongoing

progress and academic success.

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 (AGP) 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.

Screening, Identification, and Placement Procedures

The process consists of four steps:

1. Student search process
2. Data collection. (The AGP committee) collects data about each students strengths, abilities, and attributes.
3. AGP Committee Review. One of three decisions can be made:
 - AGP criteria are met the student requires differentiated services above and beyond the general education environment and expectations.
 - AGP criteria are not met any additional services will be offered above and beyond differentiated services as indicated in our project-based model.
 - Students may be nominated or screened only after one full calendar year has passed from the initial screener. The school will consider additional information as it becomes available.
4. Differentiated Education Plan (DEP). The committee develops a Differentiated Education Plan (DEP) for identified AGP students. Parents must give written approval for a student to participate in any service delivery option.

Continuation of Services for AGP students

All AGP students with a DEP are monitored annually by the AGP committee to determine the appropriate service delivery options for the following year. When a students learning needs are no longer being met by the current service delivery option, the AGP Committee (including the parent or guardian) will review all of the data to make a determination for the appropriate level of service required.

Students transferring from another school will present to STEM Academy all information regarding the student's identification for differentiated services. Bermuda Run STEM Academy will review the information, apply criteria for identification, and make a decision concerning service delivery options.

Service Delivery Options

Learning Environments are the ways students are grouped to receive instruction. These environments include flexible grouping, ability grouping, and cluster grouping.

Content Modifications are those ways in which students receive instruction in the classroom. In grades K-5, for example, a content modification might consist of learning centers or computer-assisted instruction; in middle content, the modification would include delving more deeply into content and enrichment during core instruction.

Enrichment opportunities are those programs which may exist within the curriculum, but which are often outside the regular curriculum or even outside the school. They provide students with opportunities to explore topics or pursue interests in greater depth. Examples of enrichment opportunities at Bermuda Run STEM Academy are Geography Bee, Spelling Bee, as well as mentorships, apprenticeships, and a variety of leadership opportunities. The STEM component in Project Lead The Way will provide multiple opportunities for enrichment and extension and also provides for AIG students additional modules as electives and student choice.

Child Study Team meetings including the parents, homeroom teachers, and Gifted teacher will convene to review student progress and achievement towards DEP goals. Students may attend these meetings also to set new goals and identify areas for growth and acceleration based on mastery and interest.

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)*

All students who enroll and have been previously found eligible for special education services or provisions under a 504 will continue to have those services met. The initial identification process will occur during the request for previous records, search in PowerSchool and receipt of cum files

in addition to the registration documentation completed by the parent. The registrar will send formal records requests to the previous school.

Teachers are responsible for the early identification of students who are at risk of not meeting promotion standards. At the time students are identified as functioning below grade level, the teacher and principal with the support and assistance of the student's parent/guardian will use all available resources to begin intervention. Benchmark assessments will be used to measure progress. The MTSS process will drive the identification process. A child who fails to make gains through tier 2 and tier 3 interventions will be recommended for further evaluations.

As a parent, guardian, or advocate you have a legal right to request that your public school evaluate your child for special education. Federal law, the Individuals with Disabilities Education Act as amended in 2004 (IDEA), gives you that legal right. States, through local school districts, must "identify, locate, and evaluate every child who may have a disability requiring special education services." This is called "Child Find." When there is a suspicion that a child has a disability, parents and educators have a responsibility and a right to request a full, individual, comprehensive, multi-disciplinary evaluation.

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

EXCEPTIONAL CHILDREN'S PROGRAM RECORDS

A confidential folder shall be maintained for each child evaluated for or receiving exceptional children's services. Access to such files shall be limited in compliance with state and federal law and regulation. 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 EC 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 at a Glance with teachers and also provide recommendations for classroom modifications and accommodations for students who qualify. If files are removed from the filing cabinet for any reason (audit, review of file

CONFIDENTIALITY OF STUDENT RECORDS

Apart from directory information, personally identifiable information about a student shall not be released from a student's record without the prior written consent of the parent/guardian or emancipated student, except to the following persons: The Family Educational Rights and Privacy Act (FERPA) The law applies to all educational agencies and institutions that receive funds under any program administered by the Department of Education. The law prohibits a School from disclosing personally identifiable information from students education records without the consent of a parent or eligible student unless an exception to FERPA's general consent rule applies.

Student Records:

After a student withdraws (meaning a student is not transferring to another public School) School will keep a student's records including health and academic records for 5 years.

Exceptional Children's Education Programming

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

A free appropriate publicly supported education will be provided, in the least restrictive appropriate environment, to every disabled child with special needs. The Schools will comply with the State Board of Education's Procedures Governing Programs and Services for Children with Special Needs, and the Individuals with Disabilities Education Act and its implementing regulations.

The term "special education" means specifically designed instruction, at no cost to the parent/guardian, to meet the unique needs of the exceptional child. Each disabled child will have access to the variety of educational programs and services available to nondisabled children. This includes but is not limited to physical education, art, music, industrial arts, consumer and homemaking education, vocational education, and general interest electives. Every child suspected of having a disability is entitled to a multidisciplinary diagnosis and evaluation. All testing and evaluation materials and procedures shall be nondiscriminatory and administered in the child's native language.

Parents/guardians shall be provided in writing with the results, findings, and proposals based upon the evaluation. An Individualized Education Plan shall be developed for each disabled child whose parent/guardian consents to special education placement. Special education and related services shall be provided in the least restrictive appropriate environment to each child with special learning needs based upon the Individualized Education Program. Written notice shall be given to parents/guardians of exceptional children a reasonable time before the school system proposes to initiate or change the identification, evaluation, or educational placement of a child with special needs. The written notice shall give a full explanation of all of the procedural safeguards available to parents/guardians.

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 and outside contracted vendors when appropriate. The school is responsible for providing a full continuum of services at all times in the classroom or the Least Restrictive Environment. The school will provide a continuum of services for all students even if that means contracting with outside vendors providing a Resource Room. The Leadership team will review IEP requirements and contract for appropriate services required including Speech, PT, OT, and other related services. 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 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, student's intervention programs, manipulatives, etc.) When the need arises, students will be entitled to extended content standards. Students with those modified standards would be exempt from promotion standards.

An IEP at a Glance form will outline IEP begin and end dates, re-eval due dates, areas of exceptionality, service delivery areas and times, related services, testing/classroom accommodations, health information and any notes from a previous teacher or parent pertaining to the individual child. An EC team member will meet with each teacher at the beginning of the school year and go over the IEP to outline dates, location, frequency and duration of services, testing/classroom accommodations, and goals. At the completion of the meeting, the EC teacher has the classroom teacher sign a form indicating that they have reviewed the IEP and that they understand what is outlined. Teachers are given a folder marked confidential which houses all of their students IEP copies.

The EC Coordinator will review and share the IEP at a Glance for each student and will meet regularly with classroom teachers to discuss the progress of all EC students. These will be shared during planning time to ensure that students needs are being addressed in lesson plans and instruction. Grade level teams will have an opportunity to plan together weekly and all members of the students support team will be invited to attend in order to allow accommodations/ modifications from IEP to be considered during that time. Teachers will be provided additional, supplemental and appropriate curriculum resources and teaching strategies to use in the classroom.

The EC Coordinator will attend all DPI training and deliver training to all staff on scheduled teacher workdays to support the classroom environment and student needs. EC Coordinator will meet with each teacher to determine which best practices suit the student he/she serves based on the Individual Education Plan. Meetings related to individual student plans will be held during planning periods and will occur quarterly and/or before annual review.

Student progress will be shared with parents through quarterly report cards, progress reports, and parent conferences. All parents will be invited to attend yearly IEP meetings, re-evaluation meetings and change of placement meetings when necessary. Parents will receive student data reports from all benchmarking assessments conducted and report cards will include notations related to the present level of performance and progress towards IEP goals. If a student is not progressing towards their IEP goals, an IEP team meeting will be called. During this meeting, data will be reviewed that shows the students current level of performance. Based on the IEP team decision, additional services or time will be added to the students IEP, as needed.

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.

Bermuda Run 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 benchmarking assessments. The School expects to enroll students from 5 or 6 neighboring towns with average School Performance Grades (SPG) ranging from 40-65 and therefore understands that the focus of instruction is to meet each child where they are and set appropriate growth goals. These are included in a table format in the appendices. BRSA will strive to become an A graded school within 5 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 benchmarking assessments such as MClass, NC Check-Ins, 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, and differentiation with careful attention paid to individual student needs.

BRSA will also administer classroom assessments that include: spelling inventories, running records, writing prompt rubrics, and assessments for the modules completed in Project Lead The Way. The assessment tools are used to analyze student performance on school-based curriculum and the mission aligned to benchmarks within the Standard Course of Study. A result is a balanced approach to assessment that combines the benefits of the state, district and school-wide assessments with the instructional value of day-to-day classroom assessments and assignments to drive student engagement with the model. Students will be expected to demonstrate grade-level proficiency as well as mastery on PLTW content to enrich the core curriculum and expand their knowledge in these critical areas.

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 testing, as well as, in the foundational skills and understanding necessary for success in future grade levels.

BRSA will implement a data-driven model to measure academic progress, instructional effectiveness, and teacher capacity. The data-driven cycle of assessment, analysis, and action is expected to be 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 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
- * Ensure students on an IEP or PEP are receiving the accommodations and modifications as well as test strategies they require for success.
- * Continue to develop intensive Tier 2 and Tier 3 instructional supports to assist at-risk students and improve or accelerate academic achievement
- * Ensure AIG students are given opportunities for enrichment

Students must be assessed for the purpose of student academic assignment recognizing that there is a wide range of variables that must be considered in this process. The school principal should make promotion and retention decisions in accordance with state regulations and this policy.

Teachers are responsible for the early identification of students who are at risk of not meeting promotion standards. At the time students are identified as functioning below grade level, the teacher and principal with the support and assistance of the student's parent/guardian will use all available resources to begin intervention.

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 principal's office must provide in writing an official notice of retention to the parent/guardian by the last day of school.

Parental involvement is essential in providing quality instruction for all students.

Teachers will communicate each child's progress and identify areas of concern. All parents/guardians will receive communication regarding the progress of each student between report cards, regardless of the level of progress.

Student grades should reflect academic achievement.

While attendance and behavior may influence a student's learning, they should be reported separately, not included in the student's grade.

Teachers should compare each student's performance against pre-set standards, not against the performance of other students.

For missing work, teachers should provide reasonable opportunities to complete a make-up assignment(s) in order to demonstrate the targeted

learning

Teachers should provide students and their parents with a clear explanation of their grading practices including the weighting of formative and summative assessments and rubrics as appropriate.

All assessments and assignments, including teacher-made tests, should be aligned with the Common Core State Standards, North Carolina Essential Standards, and/or the Voyager Academy Charter and education plan and be designed to assess student achievement accurately.

Interim Progress Reports to Students with Disabilities

Each parent/guardian of a student receiving exceptional children's services will receive an assessment of the student's progress toward goals on the student's Individual Education Plan whenever the student receives a formal progress report under this policy. The student's IEP shall state how the parent/guardian will receive such assessments.

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. (part of the Child Study Team)

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.

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.*

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.*

The academic and personal success of students is at the forefront of all processes and procedures. The School will adopt and follow the policies and expectations contained in the handbooks included as appendices in order to stimulate a productive learning environment and to promote responsible citizenship. The discipline matrix attached articulates offenses and consequences including those that can result in suspension or expulsion as well as due process and grievance procedures.

In order to establish a thoughtful Climate and Culture for our campus, the School will implement The 7 Habits of Highly Effective Students through The Leader In Me program to demonstrate a leadership and service-based community. The School will be provided with formal training in TLIM and will create a school-based leadership team (Lighthouse Team) designed to support and promote positive behavior throughout the school. Teachers will strive to use informal classroom management techniques that are proactive and diffuse issues before they escalate. Teachers will guide students toward responding appropriately to difficult situations. The 7 Habits of Highly Effective Students will be used as a resource tool and will complement the Schools discipline matrix.

The School will aim to instill in its students a character education through the School's use of the book, The 7 Habits of Highly Effective Students by Stephen Covey. The behavioral/social issues we believe can be mitigated through character education and the 7 habits are:

Bullying Students will value each other and treat each other with respect. Through learning the value of listening to others, they will be able to value multiple points of view and communicate effectively.

Conflict resolution Students learn to build relationships effectively and turn conflict into "win-win" situations.

Obedience to teachers and attention to coursework Students will value goal- setting and prioritizing to achieve these goals. Students learn the connection between their coursework and their future goals. This promotes respect and collaboration between teachers and students.

Maintaining healthy habits Drug and alcohol prevention, as well as prevention of self-harm (cutting, choking, etc.), will be highlighted by building healthy habits of body, heart, mind, and soul. Students learn the connection between decisions made now, whether healthy or not and future goals and quality of life.

The 7 Habits of Highly Effective Students: This resource provides a framework for students to build effective life skills and habits into everyday interactions. Without directly calling itself an anti-bullying or anti-drug program, it incorporates strategies that teenage students can practice that will ultimately lead them down ethical and healthy pathways in life. The seven habits are:

Be Proactive: Students learn to consider the impact of choices they make today on their future. They develop the value of positive thinking and saying "can" over "cant."

Begin with the End in Mind: Students are encouraged to map the paths to their goals. Students consider their goals for the future and make choices in the present that will lead to the achievement of those goals.

Put First Things First: Students learn the value of prioritizing. They develop strategies to effectively organize their time to create balance in

their lives.

Think Win-Win: Students consider the feelings of both people in a relationship, themselves and the other person. Settling differences requires students to consider which solutions will allow both people to be winners.

Seek First to Understand, Then to Be Understood: Students learn different styles of listening and how to be good listeners

Section III: Education Plan Concerns and Additional Questions		
What specific types of high-quality "curriculum materials and latest technologies" will be used? How are the instructional field trips budgeted?	Jay Whalen	Instructiona
How will you ensure your staff are fully trained to implement the Project Lead The Way? Will Project Lead The Way be your sole curriculum or will something different be used for language arts and math?	Jessica Kelly	Instructiona
You note. "Teachers should provide students and their parents with a clear explanation of their grading practices including the weighting of formative and summative assessments and rubrics as appropriate." Will teachers on the same grade level team be allowed to have different grading practices? If so, how will you know that an "A" in reading, for example, represents the same level of mastery across classrooms?	Sally Houston	Instructiona
Is the technology provided and collaborative seating built into the budget adequately?	Jessica Kelly	Curriculum a
What is the "STEM-based aftercare enrichment program" and what is the budget for it? How is transportation provided for the after school tutoring for at-risk students? How are you recruiting teachers to ensure "all classes are taught by certified personnel"?	Jay Whalen	Curriculum a
There are a number of curricula outlined. Are they all aligned to the NC SCOS? How do they all work together for a vertically aligned STEM curriculum in the school? Why does it say "purposeful and sySTEMatic instruction will be based on Florida standards"?		
Will every teacher have a different grading plan for percentages for test, homework, etc. or will there be unified grading plan across the school?	Shannon Sellers	Curriculum a
Will the quarterly data chats with families be a parent/teacher conference or in a different format?	Shannon Stein	Curriculum a
How are assessment dates reflected in the school calendar? How do the number and/or frequency of assessments impact instructional time for students?	Sally Houston	Curriculum a
Who makes up the MTSS team? Who makes up the Child Study team? How is data tracked and monitored as students move through Tiers? When do required EL service hours happen throughout the day? What is the plan to support and monitor ELs for 4 years after exiting the program?	Jay Whalen	Special Prog
How will you identify students for a 504? As written it indicates students who enroll and have been previously identified. Please clarify. Are there any plans for your ELL population?	Jessica Kelly	Exceptional
How will you identify students that qualify for 504 plan? Who will be on the Child Find team? What interventions will you put in place for students that are waiting testing for exceptional children services?	Shannon Sellers	Exceptional
Portions of this section are directly copied from a website.	Jay Whalen	Exceptional
The application indicates "The school will provide a continuum of services for all students even if that means contracting with outside vendors providing a Resource Room." What are the components of the full continuum?	Robert McOuat	Exceptional
In order to provide the full continuum of services, you state you would contract for a resource classroom, but what if you have a Life Skills student that is self-contained, will you contract or hire a teacher?	Shannon Sellers	Exceptional
Promotion standards are vague. Why is there a reference to another charter school's policy in your standards? "and/or the Voyager Academy Charter and education plan and be designed to assess student achievement accurately." Are you basing your plan on another school's plan?	Shannon Sellers	Student Perf

Applicant needs to clarify reference to Voyager Academy Charter in application.	Jessica Kelly	Student Perf
Why is there a reference to Voyager Academy Charter on page 31 of the application?	Shannon Stein	Student Perf
When suspending a child with a disability, when do the protections under IDEA kick in? When does the school need to conduct a manifestation determination review?	Robert McOuat	Student Cond
Applicant needs to include due process for code of conduct. Applicant needs to clarify what code of conduct procedures would be used for EC students.	Jessica Kelly	Student Cond
Where does due process come into play in your Code of Conduct? Based on the information in the appendix only with a long-term suspension or expulsion do you plan to hold a manifestation meeting, and that meeting must happen anytime a student has reached over 10 days of suspension.	Shannon Sellers	Student Cond
What are the specific processes for handling student infractions?	Jay Whalen	Student Cond
What supports will be in place for EC students and students struggling with behavior?		
I believe that it would be worth looking at the application for Voyager Academy Charter to see what type of duplication has occurred between this application and the one submitted for consideration by Bermuda Run. My sense is that there has been some copying from that application.	Shannon Stein	Certify Educ
Voyager Academy is mentioned in this section as being the school, has other information been copied from Voyager's application? Legal concerns concerning Students with Disabilities and suspensions.	Shannon Sellers	Certify Educ

Reviewer	Score
Shannon Sellers	
Tammi Sutton	
Bruce Friend	
Danielle Allen	
Jay Whalen	Pass
Jessica Kelly	Pass
Joe Maimone	
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Shannon Sellers	Pass
Sally Houston	Pass
Robert McOuat	
Phyllis Gibbs	
Lindalyn Kakadelis	
Alex Quigley	

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:

School Governing Body:

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

The municipality must be officially incorporated by the NC General Assembly upon application submission.

Name of Private NonprofitMunicipality: Bermuda Run STEM Academy, Inc.

Mailing Address: 1324 Berwick Rd.

City/State/Zip: Winston-Salem NC 27103

Street Address: 1324 Berwick Rd.

Phone: 336-287-6405

Fax: 704-846-5098

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

FEDERAL TAX ID: 82-2698449

Tax-Exempt Status 501 (c)(3)

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

Yes (copy of letter from federal government attached: Appendix D)

X No

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

Either the governing body of the municipality who serve ex officio as the board of directors of a charter school granted to a municipality or the board of directors appointed to govern a charter school granted to a municipality is the legal entity that has responsibility for all aspects of the proposed charter. Its members should reflect the

ability to operate a charter school from both business and education perspectives.

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

Please complete the table provided depicting the members of the board that will oversee the proposed school.

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?
Dr. Linda Petrou	Chair	FORSYTH	Retired College Professor	None	N
Courtney Ageon, CPA	Treasurer	GUILFORD	CPA	CPA	N
David Singletary	Vice Chair	DAVIE	Licensed Pastor	Minister	N
Connor Groce	Member	FORSYTH	Student	None	N
April Broadway	Secretary	FORSYTH	Internal Controls Officer	None	N
Benita Finney	Member	DAVIE	Event Coordinator	None	N

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. Clemmons STEM Academy, Inc. has filed Articles of Amendment with the Office of the Secretary of State, to change its corporate name to Bermuda Run STEM Academy, Inc. No other changes to the corporation were made. 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 a commitment to the mission and purpose of Bermuda Run 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 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 school's mission and purpose. The Board's 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 Bermuda Run 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 the 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 school's 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 2017 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 school's 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 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 training, or otherwise acquire the information after the board meeting, and pass an assessment after each

module which demonstrates the 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 anyone 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 him/herself from voting on 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 signs 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 Bermuda Run 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 that further the school's 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 Bermuda Run STEM Academy. These groups will work in concert with the School leadership team: 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 Principal. Given the importance of the School Improvement Plan as the document which will both guide and evaluate the school's programs, both the Principal will serve as an ad-hoc member 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 the 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 school's 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 Bermuda Run 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 stated commitment to the NC Open Meetings Law (Appendix G).
4. A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix H)

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

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

X Not Applicable

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

X Not Applicable

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

X Not Applicable

Projected Staff:

Below, please outline a list of positions anticipated for the charter school (e.g., principal/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.

Lead Administrator 1
Assistant Administrator 1
Finance Officer 1
Clerical 1
Registrar 1
Nurse 1
Guidance Counselor 1
Custodial 2

Core Content Teachers 27
Electives Teachers 7
Exceptional Ed Teachers 2
Teacher Assistants 5

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 staff. The expected school culture of service and leadership will result in recruiting effective teachers and maintaining high retention rates and high academic performance. The School principal will place advertisements on targeted social media, word of mouth recruitment and partnerships with local universities to recruit high performing teachers. Instructional openings will also be posted online through NC Search and through the NC Charter Association. 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 Principal will develop "interview committees" comprised of team leaders to help identify top candidates that would be a good fit for the program and students. All final recommendations will be presented by the Principal for Board approval.

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 the feedback tools in the NCEES process. Experience and research dictate that when the employees have a good benefits package and a positive working relationship with their supervisors the environment is conducive to effective teaching and learning and retention of desirable staff.

All efforts will be made to reward high performing teachers and to provide them with ongoing professional development that helps them invest in the

School as the School invests in the teacher.

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 that will not participate in the NC Retirement System. The employees will be employed by the school under the purview of the Governing Board. 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.

The School will comply with all Federal, State, and Local non-discrimination laws including but not limited to race, color, religion, sex, national origin, age, status, disability, veteran status, genetic information or as otherwise may be prohibited by federal and state law. We want to maintain an employee relations climate, which promotes maximum personal development and achievement.

Employees are employees of the School and governed by the policies and handbooks of the Board. The Board will hire the School Principal. The School Principal will follow the hiring policies and procedures in the Board Policy manual and present all candidates for formal Board approval pending successful background checks and drug tests.

The 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 another 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, 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 a criminal history. The School is required to apply its policy uniformly in requiring applicants for employment.

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 \$44,000 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. The non-instructional staff has been budgeted to include a range of \$14-15 dollars per hour for the front office and custodial staff, which is the competitive market rate. For other specialized non-instructional 12 -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.

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

Employment-At-Will

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. No supervisor, employee or another representative of the School is authorized to alter the terminable-at-will nature of employment with the School or make any agreement to the contrary. Any agreement altering or modifying the terminable-at-will nature of employment with the School must be in writing signed by the Principal of the School and approved by the Schools Board of Directors.

Open-Door Policy

The School is committed to fair and equitable treatment for all employees. Good-faith complaints, grievances, questions, comments, suggestions, or ideas are of interest to School. The School encourages its employees to communicate such good-faith complaints, grievances, questions, comments, suggestions, or ideas to their supervisor, or the Principal.

Grievance Policy and Procedures

This policy is in place to respond to a grievance by an employee or volunteer (herein after "employee"). It is expected that any employee with an issue should try to resolve the issue by using open communication with their supervisor. If an employee feels that their issue is still a concern after speaking to their supervisor and that the issue has risen to the level of a grievance then the employee may initiate the grievance procedures as described below. The goal of filing a formal grievance would be to use the process to come to an equitable solution.

The grievance policy is included as an appendix for review.

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/aftercare 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.

BRSA will have at least one staff person certified in EC, ELL, and AIG respectively, in anticipation of serving these students prior to the school opening. The Principal and Registrar will review completed enrollment packages with the leadership team to identify the unique and supplemental staffing needs anticipated based upon student demographics and data. After school opens, data collected from cum files, home language surveys and Student Search measures will help the school quantify and adjust 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 qualified students 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 needed.

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

The school will only employ licensed teachers and requires certification for all instructional and administrative staff. Before employing any teacher and with the teachers prior written consent, the School will obtain and review a copy of the teachers professional license. The School will assist its teachers in meeting the licensure requirements established by DPI and the SBE, including all programs and services required to assist teachers to obtain standards professional II licensure status. Bermuda Run STEM will participate in the NCEES program to ensure that evaluation data is available to support licensure and re-certification efforts of the staff. The School will implement an approved BT plan as well as a Board approved Licensure Plan. All hired educators must meet the requirements prior to employment and ensure any conditional requirements are met by the educator within the time required. Non-renewable certificates and renewable requirements will be monitored for compliance. Pursuant to North Carolina's requirements for teachers from outside the state must be completed for clear renewable certification. These requirements are incorporated into North Carolina's approved teacher preparation programs and must be completed within five years.

Teacher and Leadership contracts and job descriptions follow:

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.
- * Submits budgetary requests and works with the Finance Manager to monitor expenditure of funds.
- * Supervises the maintenance of all required building records and reports.
- * Prepares or supervises the preparation of reports, records, lists, and all other paperwork required or appropriate to the schools administration.
- * 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.
- * Assist in the development, revision, and evaluation of curriculum.
- * Works with the guidance program to enhance individual student education and development.
- * Maintains high standards of student conduct and enforces discipline when necessary.
- * Supports proper student conduct and maintains student discipline.
- * Attends special events held to recognize student achievement and attends school-sponsored activities, functions and athletic events.
- * Works with Registrar to assume the responsibility for the attendance, conduct, and maintenance of health of students.
- * Assumes responsibility for own professional growth.
- * Supervises all professional, paraprofessional, administrative, and support personnel attached to the school.
- * Assists in recruiting, screening, hiring, training, assigning, and evaluating the schools professional staff.
- * Approves the master teaching schedule and any special assignments.
- * Evaluates and counsels all staff members regarding their individual and group performance.

ASSISTANT PRINCIPAL

(Bachelors in Education, Certificate/Licensure and a minimum of 3 years of classroom instruction required)

- * Act as Administrator in charge in absence of Principal
- * Serve as LEA as needed in EC/ELL/AIG meetings
- * Share with the principal the responsibility for protecting the health and welfare of students.
- * Oversees all matters of student attendance and compliance
- * Makes recommendations for revisions of policies and rules affecting the students life in school.
- * Resolves all discipline problems in a fair and just manner and maintains records of any disciplinary action.
- * Assists in administering practices dealing with campus control and security.

- * Assists in assigning faculty to the supervision of co-curricular activities.
- * Meets with department heads and/or leadership team to ensure compliance with standards
- * Works with the test coordinator in the administration of achievement tests
- * Works closely with Principal/Guidance Counselor and Testing Coordinator on the master schedule

- * Attends formal and informal meetings with teachers as necessary
- * Communicates with parents concerning curriculum and teacher concerns

TEACHER

(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 school's philosophy of education and instructional goals and objectives.
- * Assesses the accomplishments of students on a regular basis and provides progress reports as required.
- * Seek assistance from the EC Teachers and Facilitator as required
- * Takes all necessary and reasonable precautions to protect students, equipment, materials, and facilities.
- * Maintains accurate, complete and correct records as required by law and administrative regulation.
- * Assists the administration in implementing all policies and rule governing student life and conduct, and for the classroom develop reasonable rules of classroom behavior and procedures and maintains order in the classroom in a fair and just manner.
- * 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.

EC/ELL/AIG Specialist

Masters Degree in Exceptional Education and/or Endorsement in ELL and AIG license

- * Provide appropriate educational accommodations and modifications for students' IEP and DEP plans
- * Supervise other EC/ELL and AIG teachers and support general education classroom teachers in their lesson plans and delivery for students in need
- * Serve as a liaison at all parent conferences and IEP or Child Study Team meetings
- * Coordinates testing, evaluations, and referrals as appropriate
- * Coordinate for contracted services as needed ie; Speech/PT/OT etc.

Additional job descriptions for support staff and non-instructional staff will be completed.

Staff Evaluation and Professional Development

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

The Principal will work with the HR Manager and Licensure Director to maintain teacher licensure and requirements and to account for data in the yearly SAR reports.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission and educational program. Plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state law and the Every Child Succeeds Act. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

BRSA provides procedural guidelines and support that enhances the likelihood of recruiting highly effective staff. BRSA 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 the instructional capacity of the staff. To that point, the school has developed two integral partnerships that will drive the success of the school. Initial and ongoing Professional Development is expected to be a "core" component for instructional staff; both an expectation, and a guarantee that will help BRSA identify quality personnel, and retain highly effective teachers. Instructional openings will also be posted online through NC Search and Teachers-teachers.com and other well-known educational recruiting sites. All candidates will go through a detailed process:

1. Application
2. Review of academic qualification
3. Review of state licensure
4. Review of prior teaching experience
5. (3) reference checks
6. Personal interviews and
7. Criminal/health screening.

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. In an effort to train and mentor our instructional personnel, BRSA has identified 20 PD and conference days in the operational calendar that support the mission of the School.

BRSA 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 and Leader In Me character program. Initial professional development will be uniform for all staff in the Project Lead The Way modules and STEM integration across core content areas. Ongoing training and professional development will be individualized, tailored to the specific needs of each teacher based on student growth data, leadership feedback, and personal reflections in their personal development plans. The professional development provided by The Leader In Me and vendor based training will provide teachers the knowledge and support they need to meet the mission of this Schools program and purpose.

The intensive PD will also provide all staff 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 program as a means 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 NAEP to measure teachers' effectiveness in perspective of the unique educational and character programs.

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 will 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 BRSA to improve academic performance for all students to provide our families a unique and satisfying educational experience.

- 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 the success of the school mission. The School will provide a variety of professional development opportunities for the instructional staff through our business partnerships, vendors and staff experts. 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. Professional Development will be delivered both internally and externally depending upon the needs of the staff and the students. Professional development will be conducted both internally and externally in an effort to support the educational program. Internal PD will be presented by site-based leadership built upon the research and best instructional practices of NAEP. Internal PD will also be provided by mentor teachers through the 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 professional development will be provided, as available, from vendors and educational consultants; for example, if additional expertise is required or when a curriculum program mandates specific training. External professional development will be scheduled during mutually agreed upon times between School leadership and the provider (community partner, vendor, and/or educational consultant). The effectiveness of the offered professional development will be measured through pre and post participant surveys, feedback questions, changes in instructional practices, and learner outcomes demonstrated by end of year assessments.

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

In the first year, teachers will report 2 weeks prior to school opening. Each year thereafter, teachers will report 5 days full-day school opening. Additional days for team professional development are built into the calendar. Appropriate and relevant school-wide training will occur during preplanning, designated staff meetings, and teacher planning days. All staff will participate in school-initiated and other relevant and necessary workshops for professional development, and a member of the administrative team will coordinate, assist and monitor the staff development process. Each week, different leadership and team meetings will occur which may include prescribed or specific professional development or PLC meetings. Grade level common planning is also built into the master schedule to allow our teachers to work and plan together in a cross-curricular manner each week. Grade level teams may also elect to meet during another common block of time, such as before or after school.

The professional development plan will include the following days, at a minimum:

10 pre-planning PD Days for the start-up year and 5 pre-planning days in subsequent years

This induction period includes training in the following areas:

School safety protocols, policies, procedures, and ethics. This training will be led by the School administration.

Differentiated STEM initiative training as relevant to specific grade levels specifically aligned with the Project Lead The Way modules.

Training for the MTSS process and related paperwork and support materials will allow by selected school staff and/or through regional cohort training that is available to charter schools and experts in the field

Teachers will be trained by School leadership on lesson plan expectations. This training will highlight how to document the standards addressed, as well as the accommodations and services provided.

Curriculum vendors will provide professional development on how best to implement our purchased materials/programs. (Reading Street, Go Math, Carolina Biological)

Designated teachers will spend several days in training to learn and implement The Leader In Me program

- 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.*

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 is aligned to their unique area of need, interest or growth. Teachers will be formally observed utilizing the NCEES program and their PDP will be determined according to those observations and conversations between Leadership and Faculty. Once

hired, 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 training. 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.

The Schools operating and instructional calendar are designed to meet the mission of the School. The yearly calendar is drafted at 185 student days which allows for more staff PD and conference days during the year. Staff is expected to work 202 days, (in year 1 only) and 197 days in each following year thus allowing purposeful, planned days for PD, conferences and makeup dates if needed. Staff will also have the opportunity to participate in off-site training through DPI or other conferences specific to their needs.

Our K-8 model includes a seven-hour day to ensure protected time for instruction, a STEM block, and 30minutes 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 allows 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 believe to be very effective is 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. All teachers will receive initial and ongoing support to implement Leader In Me and select teachers will become certified instructors of STEM for Project Lead The Way. Teacher leaders will work with staff to integrate the module themes and STEM style teaching and learning throughout all content areas.

Enrollment and Marketing:

- Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.218.45(a-i) carefully.

Marketing Plan

Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

The founding Board members have reached out to the local community for support. Dinners and meetings have been held in Davie and adjacent counties. A large-scale targeted postcard drop will be created and sent out inviting parents to attend parent informational sessions. The postcards will be largely distributed to the 8-mile radius in which the School intends to

serve and in multiple adjoining counties as described with targeted maps included. This area was selected due to 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 lacks any schools of choice. The Bermuda Run and adjacent 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. The Board and local community supporters will engage the community through public presentations and partnerships with other local agencies and non-competitive schools. 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. Additionally, 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 many students will come from the neighboring communities, the promotional plan to be followed in publicizing the school will be designed to reach the extended community and accordingly, all racial/ethnic groups within it. Marketing materials will articulate the services offered to all students. The School will embrace all students, regardless of their racial, cultural, ethnic or religious orientation. This message will be clearly communicated in all oral presentations and printed materials.

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, homeowner associations, and community centers. Presentations will include information about charter schools in general and specifically about the Schools curriculum focus and the application procedure. Flyers will be developed for distribution at community centers, churches, child care centers and retail hubs. The School will contact social service agencies in the area that typically serve "harder to reach" families. Information brochures and applications printed in multiple languages when appropriate and information will be presented regarding the Schools intent to provide Transportation and a Lunch Program. 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. The School has adopted a non-discrimination policy and will include this policy in all its advertisements and enrollment marketing communications. Marketing will begin in earnest as soon as the CSAB recommends the School to move towards the RTO process.

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.*

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 Project Lead The Way presentations 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.

The following are some detailed examples of the means that will be used for sharing information with parents and encouraging their participation:

Progress reports, report cards via Powerschool grading and reporting system;
Urgent updates or reminders via Text REMIND

Weekly newsletters sent via email and posted on the Website and Facebook

Collaborative conferences and meetings to review data and progress as desired and if applicable to a student;

Sharing of instructional and testing calendars with parents during orientation;

Parent participation in the writing of the School Improvement Plan by implementing a School Improvement Team comprised of parent and staff;
Creation of the PTO; Open, posted Board meetings and an assigned Parent Liaison

Examples of areas where parents and community members will be involved are:

Quarterly Parent/Teacher Conferences hosted in the evenings at the school for parents to discuss topics affecting their children's educational progress. These will be student-led by students in grades 3 and higher

Open Houses, Career Fairs, Special events - held yearly to maintain communication and active involvement between the school and community.

School Website, Monthly Newsletters, and Event Calendars updated monthly to disseminate information and maintain open lines of communication

Parent Teacher Student Association (PTO) coordinates extra-curricular events involving parents, teachers, students, and community members

The Board and School Principal will involve parents in the decision-making process by:

Sending a survey to parents to solicit input before a major policy decision and posting open agendas for Board meetings which highlight concerns or projects at hand;

Convening a series of parent and community forums, chaired by the board of directors, to discuss a major challenge facing the School.

The founding Board members have been invested and ingrained in Davie and the surrounding Counties, thereby making the group well-suited to connect the new School with local business partnerships and community support. Letters of support have been collected from various governments, schools and businesses showing appreciation for this educational opportunity and the

grass-roots efforts to engage experts from the extended communities will continue. The full integration of Project Lead The Way includes many options for experts in the field of engineering, biomedical sciences, and technology to invest in the School and its students.

The School intends to hold an open STEM Fair each semester and invite the community to attend and to participate in the celebrations of student work and student presentations.

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 withdrawals and transfers.*

Bermuda Run STEM Academy will admit students without regard to race, sex, disability, color, religion, national, or ethnic origin. All NC residents are eligible to attend the school at the appropriate grade level.

PICS is a tuition-free public charter school.

Admission is based on a lottery. The application period begins on January 1 for the school year starting the following fall. The application window will remain open for 60 days and a public lottery will be held each March. (this will vary and begin immediately after approval for the opening year)

Applications will be available online and via hard copy

If there are fewer applicants than slots available at the time of the lottery, all applicants will be admitted.

Accepted families who enroll in BRSA will be required to submit eligibility documentation and must read and agree to follow the BRSA policies and procedures.

Students attending BRSA may live in any county in North Carolina and must reside in North Carolina at the time of application.

All siblings of current BRSA students and children of current BRSA full-time staff members and board members (up to a maximum of 15% of enrollment) are admitted before the lottery to any open spots for the grade in which that student is applying. If there are more siblings applying than spots available there will be a lottery held among siblings of BRSA students.

Students who are twins, triplets, etc. must each complete an application. However, only one application will be entered in the lottery for those

students. If that application is accepted, all of the siblings, twins or triplets, etc. will also be admitted.

Each applicant will receive an email at the conclusion of the lottery that will notify you of acceptance or waitlist position for the grade you have applied. If you are offered a seat, you will have 14 days to accept the seat.

Students not admitted through the lottery will be placed on a waitlist. Students will be kept on the waitlist until the end of the school year. If a spot becomes available, we will contact students in order of their waitlist number. Waitlist status can be checked on the School registration site where you made the initial application for admission.

Prior to attending School, the parent is required to submit all documents for registration including proof of residence, immunization records and other documents needed.

BRSA will have a designated McKinney-Vento Coordinator that coordinates services for students under the McKinney-Vento Homelessness Assistance Act and reports all data as required to NC Department of Public Instruction. The coordinator will be identified by the Principal and shall follow all federally mandated protocols for identifying and serving homeless students identified by the McKinney-Vento Homelessness Assistance Act.

Schools Right to Refuse Enrollment

BRSA reserves the right to refuse to enroll any student currently under a term of expulsion or suspension by his or her school until that term is over.

The School reserves the right to refuse to enroll a student if a parent willingly and knowingly provided incorrect information on the enrollment application.

If a student has accepted enrollment at the school but does not appear at the school in the first 2 days of school, the school will make reasonable attempts to contact the parents. If there is no response from the parent by the 3rd day of school, the school reserves the right to remove the student from their enrollment roster and offer the next student on the waitlist the spot.

Parents have the right to withdraw students or transfer anytime. It is the Parent's responsibility to complete a withdrawal form and submit to the registrar. It is the School's responsibility to transfer all student records to the receiving School and to withdraw the student from PowerSchool and update the monthly PMR.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No: x

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).*
- 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.*

PROJECTED ENROLLMENT

Year 1 through Year 5

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Davie County Schools
- LEA #2 Winston Salem/Forsyth County Schools
- LEA #3 Davidson County Schools

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

	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA 300	LEA 340	LEA 290	LEA 300	LEA 340	LEA 290	LEA 300	LEA 340	LEA 290	LEA 300	LEA 340	LEA 290	LEA 300	LEA 340	LEA 290
Kindergarten	40	20	20	40	20	20	40	20	20	40	20	20	40	20	20
Grade 01	42	21	21	42	21	21	42	21	21	42	21	21	42	21	21
Grade 02	42	21	21	42	21	21	42	21	21	42	21	21	42	21	21
Grade 03	42	21	21	42	21	21	42	21	21	42	21	21	42	21	21
Grade 04	44	22	22	44	22	22	45	23	22	45	23	22	45	23	22
Grade 05	44	22	22	44	22	22	45	23	22	45	23	22	45	23	22
Grade 06	23	12	11	44	22	22	48	24	24	48	24	24	48	24	24
Grade 07	0	0	0	35	17	17	48	24	24	48	24	24	48	24	24
Grade 08	0	0	0	0	0	0	46	24	24	46	24	24	46	24	24
	277	139	138	333	166	166	398	201	199	398	201	199	398	201	199
	554			665			798			798			798		

Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
Where are you in the process of obtaining 501(c)(3) status?	Jay Whalen	Tax-Exempt S
The board is lacking in legal, academic, and facilities expertise.	Jay Whalen	Governance a
How will the board be evaluated? Why are the By-Laws for a different organization?	Shannon Sellers	Governance a
Applicant needs to clarify by-laws.	Jessica Kelly	Governance a
NA	Sally Houston	Proposed Man
N/a	Shannon Sellers	Proposed Man
N/A	Shannon Stein	Proposed Man
Are bus drivers not included in staffing? Is one guidance counselor realistic for the projected enrollment?	Jessica Kelly	Staffing Pla
Where is the EL teacher in the proposed staffing plan?	Jay Whalen	Staffing Pla
How will 2 EC teachers be sufficient for a projected 55 students?		
There are several initiatives that are proposed (i.e. STEM, Leader in Me, PLC's, etc) Is there enough support planned to be successful with all these initiatives?	Shannon Stein	Staff Evalua
Is there enough on-going Professional Development throughout the year to support all the programs you plan to implement? Has the end of the year evaluation been developed or will you use the NC Teacher Evaluation Summative? How will mentors be chosen for first year teachers?	Shannon Sellers	Staff Evalua
How will you support parents of EL students? Will you be translating all documents?	Jay Whalen	Parent and C
Have you considered the funding implications of letting students/families wait 14 days to confirm they will attend?	Shannon Stein	Admissions P
N/A	Shannon Stein	Weighted Lot
Applicant needs to clarify allowing families 14 days to accept a seat. How could this negatively impact enrollment overall when trying to fill seats?	Jessica Kelly	Weighted Lot

Reviewer	Score
Shannon Sellers	
Alex Quigley	
Bruce Friend	
Danielle Allen	
Jay Whalen	Pass
Jessica Kelly	Pass
Joe Maimone	
Lindalyn Kakadelis	
Phyllis Gibbs	
Robert McOuat	
Sally Houston	Pass
Shannon Sellers	Pass
Shannon Stein	Pass
Sherry Reeves	
Stephenie Clark	
Tammi Sutton	

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 requested for students who live a reasonable distance from the school, which would be considered as a 3-10 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 in the school who do not utilize 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 3-10 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. This RFP will be specific to include personnel as the responsibility of the vendor. For this reason, personnel related to preparing and serving food is not included in the budget.

The vendor will also 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 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 the 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.

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

The NonprofitBoard shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- e. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' compensation: as specified by Chapter 97 of the General Statutes, Workers' Compensation Law.

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	\$4,400,000		\$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.

clemmonsforsyth

09/30/2018

(Board Chair Signature)

(Date)

Facility:

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

What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy.

The Board 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 Bermuda Run 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 is submitted in attachment O, and ultimately will be decided upon through a collaborative effort of the Board and the developer, 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 \$500k+ 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 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.

X

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
Applicant needs to clarify limiting the distance of providing transportation especially if looking to include students from Winston Salem.	Jessica Kelly	Transportati
Is 3-10 mile radius for bus stops reasonable when you are pulling from cities as far as 20 miles away? What happens if a student is at a depot and there isn't a seat available on the bus? How can you ensure that transportation will not become an issue for a student getting to and from school?	Shannon Sellers	Transportati
- You noted in another section of your application that you expect students from Winston-Salem to attend your school. That's over 20 miles away. Why will you limit the transportation radius to ten miles? - If bus seats are on a first come, first serve basis, what will students at a depot type stop do if the bus is full before he/she can board?	Sally Houston	Transportati
How is a 3-10 mile bus radius sufficient if you are drawing students from as far as Winston-Salem ~35mins away? Why are bus seat allocated on first come, first served basis? What is a student in need of transportation? Is carpooling feasible if you student body will come from a very spread out area across 3 different counties?	Jay Whalen	Transportati
- How will you ensure food options are available to children with dietary restrictions?	Sally Houston	School Lunch
The NSLP is reimbursement-based, and this initial costs are not allocated in the budget. How will you pay for student meals before being reimbursed?	Jay Whalen	School Lunch
Do you really think you can run a start up program with projected EDS population of the area you are in net-neutral?	Shannon Stein	School Lunch
Where are you currently in the facility negotiations? What are the terms of the lease? There is no Appendix M to support the "secured funding" referenced in the application.	Jay Whalen	Facility and

Reviewer	Score
Joe Maimone	
Tammi Sutton	
Jay Whalen	Fail
Danielle Allen	
Bruce Friend	
Alex Quigley	
Shannon Sellers	
Lindalyn Kakadelis	
Phyllis Gibbs	
Robert McOuat	
Sally Houston	Pass
Shannon Sellers	Pass
Shannon Stein	Pass
Sherry Reeves	
Stephenie Clark	
Jessica Kelly	Pass

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

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 Year 1

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>Refer to the Resource Manual Finance Section for guidance on estimated funding amounts</i></p>	<p>State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.</p> <ul style="list-style-type: none"> In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located. <p>Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p>Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</p>			
	LEA #1 300 - Davie County Schools			
	Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
	State Funds	\$5,527.90	277	\$1,531,228.30
	Local Funds	\$1,706.00	277	\$472,562.00
	Federal EC Funds	\$3,916.72	28	\$109,668.16
	Totals			\$2,113,458.46
	LEA #2 340 - Winston Salem/Forsyth County Schools			
	Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
	State Funds	\$5,416.71	139	\$752,922.69
Local Funds	\$2,016.00	139	\$280,224.00	
Federal EC Funds	\$4,464.16	14	\$62,498.24	
Totals			\$1,095,644.93	
LEA #3 290 - Davidson County Schools				
Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1	
State Funds	\$5,475.33	138	\$755,595.54	
Local Funds	\$1,172.00	138	\$161,736.00	
Federal EC Funds	\$4,383.36	13	\$56,983.68	
Totals			\$974,315.22	

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

Total Budget: Revenue Projections Year 1 through Year 5

INCOME: REVENUE PROJECTIONS	Year 1	Year 2	Year 3	Year 4	Year 5
-State ADM Funds	\$3,039,747	\$3,630,343	\$4,356,412	\$4,356,412	\$4,356,412
-Local Per Pupil Funds	\$914,522	\$1,096,253	\$1,315,503	\$1,315,503	\$1,315,503
-Exceptional Children & Federal Funds	\$229,150	\$296,867	\$356,240	\$356,240	\$356,240
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$4,183,419	\$5,023,463	\$6,028,155	\$6,028,155	\$6,028,155

***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.

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

Personnel Budget: Expenditure Projections Year 1 through Year 5

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	Year 1			Year 2			Year 3			Year 4			Year 5		
	<i>Num Staff</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>
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	2	\$32,000	\$64,000	2	\$32,000	\$64,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000	3	\$32,000	\$96,000
Student Information Clerk	1	\$36,000	\$36,000	1	\$36,000	\$36,000	1	\$36,000	\$36,000	1	\$36,000	\$36,000	1	\$36,000	\$36,000
Clinic Nurse	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000	1	\$20,000	\$20,000
Guidance Counselor	1	\$46,000	\$46,000	1	\$46,000	\$46,000	2	\$46,000	\$92,000	2	\$46,000	\$92,000	2	\$46,000	\$92,000
Facilities Personnel	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
A - Total Admin and Support:	10		\$402,000	11		\$456,000	14		\$564,600	14		\$564,600	14		\$564,600
Instructional Personnel:															
Core Content Teacher(s)	27	\$46,000	\$1,242,000	31	\$46,000	\$1,426,000	36	\$46,000	\$1,656,000	36	\$46,000	\$1,656,000	36	\$46,000	\$1,656,000
Electives/Specialty Teacher(s)	7	\$46,000	\$322,000	9	\$46,000	\$414,000	10	\$46,000	\$460,000	10	\$46,000	\$460,000	10	\$46,000	\$460,000
Exceptional Children Teacher(s)	3	\$46,000	\$138,000	4	\$46,000	\$184,000	5	\$46,000	\$230,000	5	\$46,000	\$230,000	5	\$46,000	\$230,000
Teacher Assistants	5	\$20,000	\$100,000	6	\$20,000	\$120,000	7	\$20,000	\$140,000	7	\$20,000	\$140,000	7	\$20,000	\$140,000
B - Total Instructional	42		\$1,802,000	50		\$2,144,000	58		\$2,486,000	58		\$2,486,000	58		\$2,486,000

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	52		\$2,204,000	61		\$2,600,000	72		\$3,050,600	72		\$3,050,600	72	\$3,050,600	
Administrative & Support Benefits															
Health Insurance	7	\$6,284	\$43,988	8	\$6,284	\$50,272	9	\$6,284	\$56,556	9	\$6,284	\$56,556	9	\$6,284	\$56,556
Retirement Plan--Other	5	\$1,000	\$5,000	6	\$1,000	\$6,000	7	\$1,000	\$7,000	7	\$1,000	\$7,000	7	\$1,000	\$7,000
Life Insurance	10	\$15	\$150	11	\$15	\$165	14	\$15	\$210	14	\$15	\$210	14	\$15	\$210
Medicare	10	\$600	\$6,000	11	\$600	\$6,600	14	\$600	\$8,400	14	\$600	\$8,400	14	\$600	\$8,400
Social Security	10	\$2,500	\$25,000	11	\$2,500	\$27,500	14	\$2,500	\$35,000	14	\$2,500	\$35,000	14	\$2,500	\$35,000
D - Total Admin and Support Benefits:			\$80,138			\$90,537			\$107,166			\$107,166			\$107,166
Instructional Personnel Benefits:															
Health Insurance	32	\$6,284	\$201,088	38	\$6,284	\$238,792	45	\$6,284	\$282,780	45	\$6,284	\$282,780	45	\$6,284	\$282,780
Retirement Plan--Other	19	\$1,000	\$19,000	25	\$1,000	\$25,000	27	\$1,000	\$27,000	27	\$1,000	\$27,000	27	\$1,000	\$27,000
Social Security	42	\$2,500	\$105,000	50	\$2,500	\$125,000	58	\$2,500	\$145,000	58	\$2,500	\$145,000	58	\$2,500	\$145,000
Medicare	42	\$600	\$25,200	50	\$600	\$30,000	58	\$600	\$34,800	58	\$600	\$34,800	58	\$600	\$34,800
Life Insurance	42	\$15	\$630	50	\$15	\$750	58	\$15	\$870	58	\$15	\$870	58	\$15	\$870
E - Total Instructional Personnel Benefits:			\$350,918			\$419,542			\$490,450			\$490,450			\$490,450
D+E = F - Total Personnel Benefits			\$431,056			\$510,079			\$597,616			\$597,616			\$597,616
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10		\$482,138	11		\$546,537	14		\$671,766	14		\$671,766	14		\$671,766
B+E = H - Total Instructional Personnel (Salary & Benefits)	42		\$2,152,918	50		\$2,563,542	58		\$2,976,450	58		\$2,976,450	58		\$2,976,450
G+H = J - TOTAL PERSONNEL	52		\$2,635,056	61		\$3,110,079	72		\$3,648,216	72		\$3,648,216	72		\$3,648,216

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Operations Budget: Expenditure Projections
Year 1 through Year 5

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		Year 1	Year 2	Year 3	Year 4	Year 5
	Administrative & Support:					
Office:	Office Supplies	\$6,000	\$8,000	\$10,000	\$12,000	\$13,000
	Paper	\$6,000	\$7,600	\$8,600	\$9,600	\$10,100
	Copier leases	\$14,000	\$22,000	\$24,000	\$24,000	\$24,000
	Memberships And Fees	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
Professional Contract	Legal Counsel	\$10,000	\$12,000	\$14,000	\$16,000	\$16,000
	Student Accounting	\$5,000	\$6,500	\$7,000	\$7,000	\$7,000
	Financial	\$40,000	\$48,000	\$56,000	\$56,000	\$56,000
	Audit Services	\$9,000	\$10,000	\$11,000	\$11,000	\$11,000
Facilities	Facility Lease/Mortgage	\$500,000	\$700,000	\$900,000	\$900,000	\$900,000
	Maintenance	\$10,000	\$16,900	\$17,000	\$18,000	\$18,000
	Custodial Supplies	\$2,000	\$2,500	\$5,000	\$5,500	\$5,500
	Custodial Contract	\$35,000	\$40,000	\$50,000	\$50,000	\$50,000
	Insurance (pg19)	\$20,350	\$32,500	\$44,000	\$46,000	\$46,000
Utilities	Electric	\$30,000	\$35,000	\$40,000	\$40,000	\$40,000
	Water/Sewer	\$8,000	\$8,800	\$12,000	\$13,000	\$13,000
	Trash	\$6,500	\$7,500	\$7,500	\$7,500	\$7,500
	Telephone	\$10,000	\$12,000	\$13,000	\$13,000	\$13,000
	Internet	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Transportation	Buses	\$175,000	\$175,000	\$200,000	\$200,000	\$200,000
	Gas	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000
	Oil/Tires & Maintenance	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000
Other	Marketing	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	Travel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	K - TOTAL Administrative & Support Operations	\$950,850	\$1,208,300	\$1,483,100	\$1,492,600	\$1,494,100
	Instructional:					
Classroom Technology	Technology Equipment Lease	\$75,000	\$95,000	\$105,000	\$105,000	\$105,000
	Software	\$15,000	\$24,000	\$26,000	\$28,000	\$28,000
Instructional Contract	Instructional Support	\$15,000	\$15,000	\$15,000	\$15,000	\$15,000
	Staff Development	\$35,000	\$40,000	\$55,000	\$55,000	\$55,000
	Ec Support	\$30,000	\$40,000	\$55,000	\$65,000	\$65,000
Books and Supplies	Instructional Materials	\$43,000	\$48,000	\$55,000	\$55,000	\$55,000

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

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	Curriculum/Texts	\$50,000	\$70,000	\$76,000	\$20,000	\$20,000
Books And Supplies	Health Supplies	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
	Athletic Supplies	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Technology Supplies	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Facilities	Furniture, Fixtures And Equipment Lease/Loan	\$125,000	\$135,000	\$145,000	\$145,000	\$145,000
	L - TOTAL Instructional Operations	\$412,000	\$491,000	\$556,000	\$512,000	\$512,000
	K+L = M - TOTAL OPERATIONS	\$1,362,850	\$1,699,300	\$2,039,100	\$2,004,600	\$2,006,100

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	Year 1	Year 2	Year 3	Year 4	Year 5
J - TOTAL PERSONNEL	\$2,635,056	\$3,110,079	\$3,648,216	\$3,648,216	\$3,648,216
M - TOTAL OPERATIONS	\$1,362,850	\$1,699,300	\$2,039,100	\$2,004,600	\$2,006,100
J+ M =N TOTAL EXPENDITURES	\$3,997,906	\$4,809,379	\$5,687,316	\$5,652,816	\$5,654,316
Z - TOTAL REVENUE	\$4,183,419	\$5,023,463	\$6,028,155	\$6,028,155	\$6,028,155
Z - N = SURPLUS / (DEFICIT)	\$185,513	\$214,084	\$340,839	\$375,339	\$373,839

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. Almost all of the elementary schools in the surrounding area have well over 800 students enrolled, while the current NC state average for middle school enrollment is 668. According to the demographics posted on the district websites, the school districts have grown about three to five percent each year. This equates to about 1000 students per year. It is anticipated that growth will continue for at least the next ten years. 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 school 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. 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 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.

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

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

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protect the school against unforeseen negative revenue scenarios are: the 5-7% accumulated 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. Contingency plan to reduce costs are articulated above and below in the section related to break even enrollment. Budget tool in application does not account for PRC 060, 050 etc.

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 FFETC(Furniture, Fixtures, Equipment, Technology and Curriculum) 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.

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

K-3 20:1, 4-5 21:1, 6-8 22:1 avg. core 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 LBA Haynes Strand, PLLC for comprehensive financial and related 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 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

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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 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?

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Describe how the school will develop the fund balance.

The Board has set an anticipated goal of approximately 2-5% 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.

From our research and discussions with commercial real estate brokers, general contractors and real estate developers, we anticipate the total cost the new facility would be between \$12 million and \$15 million depending on the final size and scope of the facility. This would translate into posted estimated annual facility costs assuming a typical loan financing rate in the current charter school market of 6-8%, and could be as low as 3-5% given that this program could arguably qualify for subsidized financing under the USDA loan program. The Board has already received a funding commitment from a nationally recognized and reputable investment banking firm who specializes in commercial charter school real estate to finance the permanent facility to the school as described above. The Board has also 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 \$1,250,000 and is evenly split into monthly payments beginning September after the school opens and spans over 42 months at an 8% annual interest rate. School bus financing can be facilitated by the Carolina Thomas Bus company via their Daimler-Chrysler/Mercedes financing arm. Current finance rates are 5.8% 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

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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 (FFETC) 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 Principles (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 \$1000 or more, and also items purchased as a set with a combined initial value of \$1000 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 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.

Les Merritt, CPA-CFP PC
1014 N Arendell Ave
Zebulon, NC 27597-2351
(919) 269-8553

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
EC funds are generated off of prior year enrollment and you will not receive those in year 1. How will you offset that lack of revenue?	Jay Whalen	Budget Reven
The staffing plan in the budget does not match the plan outlined in the application. How will you account for teacher raises or bonuses? That is not reflected in the salary projections?	Jay Whalen	Personnel Bu
Is \$20,000 realistic for a full time nurse? This is well under a school nurse's salary.	Shannon Sellers	Personnel Bu
Where will the cost of bus drivers be included? Is salary for nurse realistic? There are no raises to the positions listed for 5 years...is that realistic?	Jessica Kelly	Personnel Bu
Is it reasonable to think you will get a clinical nurse to work for \$20,000 given the market?	Shannon Stein	Personnel Bu
Please explain the terms of the facility financing. The school is paying almost \$1 million per year by year 3. Food service is not budgeted for. The technology budget for a STEM-based school seems low. Please provide more details about what technology is being purchased.	Jay Whalen	Operations B
Areas that seem to be lacking from consideration are both accounting services and/or food service expenditures?	Shannon Stein	Operations B
Without the federal EC funding in year 1, the school will run a deficit, and will barely run a surplus in year 2.	Jay Whalen	Total Expend
- Under the Instructional Program section of your application, you note the following: "... average student/teacher ratio will be 1:18 in the elementary and 1:20 in middle school." Your budget narrative states the following, "K-3 20:1, 4-5 21:1, 6-8 22:1 avg. core classroom." Which is accurate?	Sally Houston	Budget Narra
Have you checked with other area schools to see if a food service program can be run net neutral or at a profit? Have you received bids that are consistent with the federal food service program?	Shannon Stein	Budget Narra
The student-Teacher ratio seems to have changed from previous sections. Which ratio is correct?	Shannon Sellers	Budget Narra
The commitment of funding for "all furniture, fixtures, and equipment" from an "internationally reputable company" is not supported by any evidence. Who made that commitment and what are the terms of the agreement?	Jay Whalen	Budget Narra

Reviewer	Score
Joe Maimone	
Jessica Kelly	Pass
Jay Whalen	Fail
Danielle Allen	
Bruce Friend	
Alex Quigley	
Shannon Sellers	
Lindalyn Kakadelis	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Shannon Sellers	Pass
Sally Houston	Pass
Robert McOuat	
Phyllis Gibbs	

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VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the October 1, 2018 5:00 pm EST deadline. Payments will be accepted in the form of a certified check. Cash is not accepted.

**Application Note: The applicant must mail the certified check along with a letter indicating the name of the proposed charter school, contact information and the enclosed payment amount to be received before or on the due date of October 1, 2018 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

Payments should be made payable to North Carolina Department of Public Instruction

*North Carolina Department of Public Instruction
Office Of Charter Schools
6303 Mail Service Center
Raleigh, NC 27699-6303*

I understand the requirements pursuant to G.S. 115C-218.1(c).

clemmonsforsyth

Date: 10/01/2018

Applicant Signature:

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

Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: clemmonsforsyth

Board Position: Board Chair

Signature: _____

Date: 10/01/2018

Sworn to and subscribed before me this

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_____ day of _____, 20____.

Notary Public

Official Seal

My commission expires: _____, 20____.

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

OVERALL ASSESSMENT

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

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

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

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

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

<u>CSAB Votes</u>	
No	Yes

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

<u>Initial Screening</u>

Bermuda Run STEM Academy - BRSA will provide a challenging learning environment in STEM and leadership to advance student development and growth. The School's students will be prepared, responsible, caring and productive members of an ever changing, global society.

Mission, Purposes, and Goals	- stephenie_clark
Education Plan	- stephenie_clark
Governance and Capacity	- stephenie_clark
Operations	- stephenie_clark
Financial Plan	<p>Appendix F: incomplete board form for Benita Finney</p> <p>Appendix G: By-laws for Clemmons STEM not Bermuda</p> <p>Appendix H: Article of Incorp are for Clemmons STEM, but there is a file for name change to articles of incorp. Please provide evidence that this has been filed and processed.</p> <p>Appendix P: Not notarized - stephenie_clark</p>
OVERALL	<p>- stephenie_clark</p> <p>Appendix F: incomplete board form for Benita Finney</p> <p>Appendix G: By-laws for Clemmons STEM not Bermuda</p> <p>Appendix H: Article of Incorp are for Clemmons STEM, but there is a file for name change to articles of incorp. Please provide evidence that this has been filed and processed.</p> <p>Appendix P: Not notarized - stephenie_clark</p> <p>- danielle_allen</p> <p>Appendix F: incomplete board form for Benita Finney</p> <p>Appendix G: By-laws for Clemmons STEM not Bermuda</p> <p>Appendix H: Article of Incorp are for Clemmons STEM, but there is a file for name change to articles of incorp. Please provide evidence that this has been filed and processed.</p> <p>Appendix P: Not notarized - stephenie_clark</p>

External Evaluator

Mission, Purposes, and Goals	<p><u>Educational Need and Targeted Student Population</u></p> <p>What evidence other than growth in the county is there to show the need for the school. Were surveys given to parents? - shannon9402</p> <p><u>Educational Need and Targeted Student Population</u></p>
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	<p>How does the board intend to actively draw a diverse student body as stated? - jessicak6411</p> <p><u>Educational Need and Targeted Student Population</u> Drawing students from Winston-Salem is far. How will transportation not be a barrier for those students?</p> <p>How will you actively recruit and market to draw such a diverse student body?</p> <p>More evidence besides school performance is needed to prove a need and desire for this school in the community, especially given the aggressive enrollment targets? - jay_whalen</p> <p><u>Goals for the Proposed Charter School</u> The goal to exceed growth expectations is very lofty; is that reasonable in the beginning of the schools inception? Should it be "meets or exceeds"?</p> <p>Will there be enough data and compliance measures to share every month at the Board meeting? - shannon_stein</p> <p><u>Goals for the Proposed Charter School</u></p> <p>While it's exciting to see professional development goals for board members, have you considered professional development goals for teachers given their daily impact on student achievement? - sallyhouston11</p> <p><u>Goals for the Proposed Charter School</u> The goal to "exceed growth" each year is lofty. For the first couple of years, would it be more realistic to "meet growth?" - shannon9402</p> <p><u>Goals for the Proposed Charter School</u> Is exceeding growth a realistic goal for each year? Please clarify. - jessicak6411</p> <p><u>Goals for the Proposed Charter School</u> What is the process to asses or revise goals?</p> <p>How did you come to the 3% increases each year as proficiency goals? Is that rigorous enough?</p> <p>How is the student service hour goals supported by the educational plan? - jay_whalen</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> You note. "Teachers should provide students and their parents with a clear explanation of their grading practices including the weighting of formative and summative assessments and rubrics as appropriate." Will teachers on the same grade level team be allowed to have different grading practices? If so, how will you know that an "A" in reading, for example, represents the same level of mastery across classrooms? - sallyhouston11</p> <p><u>Instructional Program</u> How will you ensure your staff are fully trained to implement the Project Lead The Way? Will Project Lead The Way be your sole curriculum or will something different be used for language arts and math? - jessicak6411</p> <p><u>Instructional Program</u></p>

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	<p>What specific types of high-quality "curriculum materials and latest technologies" will be used?</p> <p>How are the instructional field trips budgeted? - jay_whalen</p> <p><u>Curriculum and Instructional Design</u> Will the quarterly data chats with families be a parent/teacher conference or in a different format? - shannon_stein</p> <p><u>Curriculum and Instructional Design</u> How are assessment dates reflected in the school calendar? How do the number and/or frequency of assessments impact instructional time for students? - sallyhouston11</p> <p><u>Curriculum and Instructional Design</u> Will every teacher have a different grading plan for percentages for test, homework, etc. or will there be unified grading plan across the school? - shannon9402</p> <p><u>Curriculum and Instructional Design</u> Is the technology provided and collaborative seating built into the budget adequately? - jessicak6411</p> <p><u>Curriculum and Instructional Design</u> What is the "STEM-based aftercare enrichment program" and what is the budget for it?</p> <p>How is transportation provided for the after school tutoring for at-risk students?</p> <p>How are you recruiting teachers to ensure "all classes are taught by certified personnel"?</p> <p>There are a number of curricula outlined. Are they all aligned to the NC SCOS? How do they all work together for a vertically aligned STEM curriculum in the school?</p> <p>Why does it say "purposeful and sySTEMatic instruction will be based on Florida standards"? - jay_whalen</p> <p><u>Special Programs and "At-Risk" Students</u> Who makes up the MTSS team? Who makes up the Child Study team?</p> <p>How is data tracked and monitored as students move through Tiers? When do required EL service hours happen throughout the day?</p> <p>What is the plan to support and monitor ELs for 4 years after exiting the program? - jay_whalen</p> <p><u>Exceptional Children – Identification and Records</u> How will you identify students that qualify for 504 plan? Who will be on the Child Find team? What interventions will you put in place for students that are waiting testing for exceptional children services? - shannon9402</p> <p><u>Exceptional Children – Identification and Records</u> How will you identify students for a 504? As written it indicates students who enroll and have been previously identified. Please clarify.</p> <p>Are there any plans for your ELL population? - jessicak6411</p>
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Exceptional Children – Identification and Records

Portions of this section are directly copied from a website. - jay_whalen

Exceptional Children – Education Programming

The application indicates "The school will provide a continuum of services for all students even if that means contracting with outside vendors providing a Resource Room." What are the components of the full continuum? - robert_mcouat1

Exceptional Children – Education Programming

In order to provide the full continuum of services, you state you would contract for a resource classroom, but what if you have a Life Skills student that is self-contained, will you contract or hire a teacher? - shannon9402

Student Performance Standards

Why is there a reference to Voyager Academy Charter on page 31 of the application? - shannon_stein

Student Performance Standards

Promotion standards are vague.

Why is there a reference to another charter school's policy in your standards? "and/or the Voyager Academy Charter and education plan and be designed to assess student achievement accurately." Are you basing your plan on another school's plan?

- shannon9402

Student Performance Standards

Applicant needs to clarify reference to Voyager Academy Charter in application. - jessicak6411

Student Conduct and Discipline

When suspending a child with a disability, when do the protections under IDEA kick in?

When does the school need to conduct a manifestation determination review? -

robert_mcouat1

Student Conduct and Discipline

Where does due process come into play in your Code of Conduct?

Based on the information in the appendix only with a long-term suspension or expulsion do you plan to hold a manifestation meeting, and that meeting must happen anytime a student has reached over 10 days of suspension. - shannon9402

Student Conduct and Discipline

Applicant needs to include due process for code of conduct. Applicant needs to clarify what code of conduct procedures would be used for EC students. - jessicak6411

Student Conduct and Discipline

What are the specific processes for handling student infractions?

What supports will be in place for EC students and students struggling with behavior? -

jay_whalen

Certify Education Plan

I believe that it would be worth looking at the application for Voyager Academy Charter to see what type of duplication has occurred between this application and the one submitted for consideration by Bermuda Run. My sense is that there has been some copying from that application. - shannon_stein

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	<p><u>Certify Education Plan</u> Voyager Academy is mentioned in this section as being the school, has other information been copied from Voyager's application? Legal concerns concerning Students with Disabilities and suspensions. - shannon9402</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Where are you in the process of obtaining 501(c)(3) status? - jay_whalen</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will the board be evaluated? Why are the By-Laws for a different organization? - shannon9402</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Applicant needs to clarify by-laws. - jessicak6411</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The board is lacking in legal, academic, and facilities expertise. - jay_whalen</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - shannon_stein</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - sallyhouston11</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/a - shannon9402</p> <p><u>Staffing Plans, Hiring, and Management</u> Are bus drivers not included in staffing? Is one guidance counselor realistic for the projected enrollment? - jessicak6411</p> <p><u>Staffing Plans, Hiring, and Management</u> Where is the EL teacher in the proposed staffing plan?</p> <p>How will 2 EC teachers be sufficient for a projected 55 students? - jay_whalen</p> <p><u>Staff Evaluation and Professional Development</u> There are several initiatives that are proposed (i.e. STEM, Leader in Me, PLC's, etc) Is there enough support planned to be successful with all these initiatives? - shannon_stein</p> <p><u>Staff Evaluation and Professional Development</u> Is there enough on-going Professional Development throughout the year to support all the programs you plan to implement? Has the end of the year evaluation been developed or will you use the NC Teacher Evaluation Summative? How will mentors be chosen for first year teachers? - shannon9402</p> <p><u>Parent and Community Involvement</u> How will you support parents of EL students? Will you be translating all documents? - jay_whalen</p> <p><u>Admissions Policy</u> Have you considered the funding implications of letting students/families wait 14 days to confirm they will attend? - shannon_stein</p> <p><u>Weighted Lottery</u></p>

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	<p>N/A - shannon_stein</p> <p><u>Weighted Lottery</u> Applicant needs to clarify allowing families 14 days to accept a seat. How could this negatively impact enrollment overall when trying to fill seats? - jessicak6411</p>
<p>Operations</p>	<p><u>Transportation Plan</u> - You noted in another section of your application that you expect students from Winston-Salem to attend your school. That's over 20 miles away. Why will you limit the transportation radius to ten miles? - If bus seats are on a first come, first serve basis, what will students at a depot type stop do if the bus is full before he/she can board? - sallyhouston11</p> <p><u>Transportation Plan</u> Is 3-10 mile radius for bus stops reasonable when you are pulling from cities as far as 20 miles away? What happens if a student is at a depot and there isn't a seat available on the bus? How can you ensure that transportation will not become an issue for a student getting to and from school? - shannon9402</p> <p><u>Transportation Plan</u> Applicant needs to clarify limiting the distance of providing transportation especially if looking to include students from Winston Salem. - jessicak6411</p> <p><u>Transportation Plan</u> How is a 3-10 mile bus radius sufficient if you are drawing students from as far as Winston-Salem ~35mins away? Why are bus seat allocated on first come, first served basis? What is a student is in need of transportation? Is carpooling feasible if you student body will come from a very spread out area across 3 different counties? - jay_whalen</p> <p><u>School Lunch Plan</u> Do you really think you can run a start up program with projected EDS population of the area you are in net-neutral? - shannon_stein</p> <p><u>School Lunch Plan</u> - How will you ensure food options are available to children with dietary restrictions? - sallyhouston11</p> <p><u>School Lunch Plan</u> The NSLP is reimbursement-based, and this initial costs are not allocated in the budget. How will you pay for student meals before being reimbursed? - jay_whalen</p> <p><u>Facility and Facility Contingency Plan</u> Where are you currently in the facility negotiations? What are the terms of the lease? There is no Appendix M to support the "secured funding" referenced in the application. - jay_whalen</p>

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<p>Financial Plan</p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> EC funds are generated off of prior year enrollment and you will not receive those in year 1. How will you offset that lack of revenue? - jay_whalen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Is it reasonable to think you will get a clinical nurse to work for \$20,000 given the market? - shannon_stein</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Is \$20,000 realistic for a full time nurse? This is well under a school nurse's salary. - shannon9402</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Where will the cost of bus drivers be included? Is salary for nurse realistic? There are no raises to the positions listed for 5 years...is that realistic? - jessicak6411</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> The staffing plan in the budget does not match the plan outlined in the application.</p> <p>How will you account for teacher raises or bonuses? That is not reflected in the salary projections? - jay_whalen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Areas that seem to be lacking from consideration are both accounting services and/or food service expenditures? - shannon_stein</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Please explain the terms of the facility financing. The school is paying almost \$1 million per year by year 3.</p> <p>Food service is not budgeted for.</p> <p>The technology budget for a STEM-based school seems low. Please provide more details about what technology is being purchased. - jay_whalen</p> <p><u>Total Expenditure Projections (Table)</u> Without the federal EC funding in year 1, the school will run a deficit, and will barely run a surplus in year 2. - jay_whalen</p> <p><u>Budget Narrative</u> Have you checked with other area schools to see if a food service program can be run net neutral or at a profit? Have you received bids that are consistent with the federal food service program? - shannon_stein</p> <p><u>Budget Narrative</u> - Under the Instructional Program section of your application, you note the following: "... average student/teacher ratio will be 1:18 in the elementary and 1:20 in middle school." Your budget narrative states the following, "K-3 20:1, 4-5 21:1, 6-8 22:1 avg. core classroom." Which is accurate? - sallyhouston11</p> <p><u>Budget Narrative</u> The student-Teacher ratio seems to have changed from previous sections. Which ratio is correct? - shannon9402</p> <p><u>Budget Narrative</u></p>
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	The commitment of funding for "all furniture, fixtures, and equipment" from an "internationally reputable company" is not supported by any evidence. Who made that commitment and what are the terms of the agreement? - jay_whalen
OVERALL	

<u>Charter School Advisory Board Subcommittee</u>	
Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

<u>Overall Summary</u>	
Initial Screening	<p>The Office of Charter Schools deemed this application incomplete on October 5, 2018. The following is needed for application evaluation:</p> <p>Appendix F contains an incomplete board form for Benita Finney.</p> <p>Applicant responded to the incomplete information request by the October 12, 2018 deadline.</p>
Application Review	
Application Interview	
OVERALL	