

### Application Preliminary Evaluation Packet

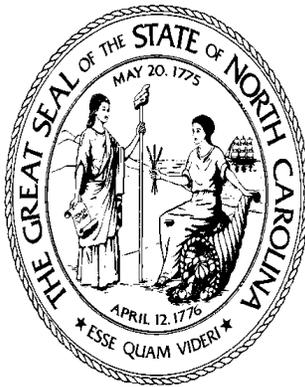
For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § 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:

Steven Walker  
Stephenie Clark  
Danielle Allen  
Cheryl Turner  
Alan Hawkes  
Alex Quigley  
Deborah Brown  
Ginger Cash  
Heather Soja  
Jennifer Gnann  
Joe Maimone  
Tracy Kelley  
Lynn Kroeger  
Shannon Sellers  
Shannon Sellers  
Deborah Brown

**Date of Review:**



## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# Jordan Lake 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: Jordan Lake 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

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

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

Name of contact person: *Stuart Enkey*

Title/Relationship to to nonprofitMunicipality: *Director*

Mailing address: 869 Vandalia Drive  
Cary NC 27519

Primary telephone: 919-480-0687 Alternative telephone: 919-650-2644

E-Mail address: *stuart.enkey@gmail.com*

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

County: WAKE

LEA: 920-Wake County Schools

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

No: X

Yes:

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

No:

Yes:

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

No:

Yes:

*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? Liberty Leadership Academy

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)

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
Year 1	K,01,02,03,04,05,06,07,08	702
Year 2	K,01,02,03,04,05,06,07,08,09	792
Year 3	K,01,02,03,04,05,06,07,08,09,10	882
Year 4	K,01,02,03,04,05,06,07,08,09,10,11	972
Year 5	K,01,02,03,04,05,06,07,08,09,10,11,12	1062

*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.*

lla Lead Administrator  
*Signature* *Title*

lla 10/01/2018  
*Printed Name* *Date*

<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<u>What is the rationale for starting with 702 students across elementary and middle school?</u>	<u>Tracy Kelley</u>	<u>Grade Levels</u>
<u>Year 1 projection is quite ambitious. Several evaluators gave feedback on the previously submitted application that opening K-8 with 702 students was not tactical or realistic. Applicant may want to clarify why these numbers were not revised for the newly submitted application.</u>	<u>Danielle Allen</u>	<u>Grade Levels</u>
<u>What is the rationale for starting a K-8 school?</u>	<u>Steven Walker</u>	<u>Grade Levels</u>
<u>Proposed enrollment in a saturated market seems ambitious and challenging. There is a great deal of testing in all of the grades represented.</u>	<u>Heather Soja</u>	<u>Grade Levels</u>
<u>Projected numbers seem ambitious and unrealistic.</u>	<u>Shannon Sellers</u>	<u>Grade Levels</u>
<u>Given the new schools opening in this area, how will you draw new families into a charter?</u>	<u>Deborah Brown</u>	<u>Grade Levels</u>
<u>Projected numbers are unrealistic.</u>	<u>Shannon Sellers</u>	<u>Certify Appl</u>
<u>Enrollment is over zealous in a saturated market.</u>	<u>Heather Soja</u>	<u>Certify Appl</u>
<u>Enrollment projects are unrealistic and not likely to result in improved outcomes for students.</u>	<u>Tracy Kelley</u>	<u>Certify Appl</u>
<u>Missing items as listed above.</u>	<u>Deborah Brown</u>	<u>Certify Appl</u>

<b>Reviewer</b>	<b>Score</b>
<u>Steven Walker</u>	<u>Pass</u>
<u>Stephenie Clark</u>	
<u>Danielle Allen</u>	<u>Pass</u>
<u>Cheryl Turner</u>	
<u>Alan Hawkes</u>	
<u>Alex Quigley</u>	
<u>Deborah Brown</u>	
<u>Ginger Cash</u>	
<u>Heather Soja</u>	<u>Fail</u>
<u>Jennifer Gnann</u>	<u>Pass</u>
<u>Joe Maimone</u>	
<u>Tracy Kelley</u>	<u>Fail</u>
<u>Lynn Kroeger</u>	
<u>Shannon Sellers</u>	
<u>Shannon Sellers</u>	<u>Fail</u>
<u>Deborah Brown</u>	<u>Fail</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:*

We partner with parents and focus on relationships to support, engage, and challenge our students. Personal responsibility, citizenship, strong academics, social skills, and a moral focus are our guiding principles as we aim for student success in college, career, and/or personal fulfillment.

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

Jordan Lake Academy utilizes Stephen Coveys seven habits of highly effective people along with effective curriculum to challenge and engage our students. We are confident our students will thrive because we center our classrooms and schools on relationships - with students, with parents, and with other stakeholders in our community. We know success is measured in many ways. Our intention is for students to succeed not only in academic endeavors, but in careers, families, and personal goals.

### **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.*

We will be drawing largely from Cary, Apex, and Eastern Chatham County. As of April 2018, Carys population was around 73% white (total population 162,025), 13% Asian, and 8% African American. Apex was similar with 80% White (total population 47,349), 8% African American, and 7% Asian. Chatham County shows a population that is 71% white, 13% African American, 12% Hispanic, and 22% Asian. The median household income for Cary and Apex respectively are \$91,481 and \$89,392. We expect our student population to reflect the area we are located in, but welcome any and all families regardless of race, socioeconomic status, religion, or any other demographic indicator.

We have selected this area for a few reasons.

We value relationships and seek to create a community that values and celebrates a variety of cultures, languages, and histories. This is especially important as 20% of Carys population was born outside of the US and 22% speak a language other than English at home. Carys population has boomed in recent years, and has seen 22% growth since the year 2000. Apex has seen similar growth with 34% growth and 11% born outside of the United States. ([www.census.gov](http://www.census.gov)).

We believe these diverse relationships are best cultivated in a smaller school setting, which is difficult to find in the area we will build in. Already the largest school district in the state, Wake County states on their website they expect to add 23,000 students in the next 7 years. Over half of their elementary schools have 600+ students. Wake County schools also state "We must populate the new schools with students from existing schools. This is what causes the majority of changes to student assignments." Families do not have a guarantee to which school their child attends as WCPSS continues redistrict school boundaries to accommodate thousands of students.

The Charter schools in the East Chatham/Cary/Apex area are few in number with long waitlists. Of Wake Countys 22 Charter schools, only 4 are in the Cary/Apex area. Two have significantly different pedagogies that we do not compete with: Triangle Math & Science Academy, and Sterling Montessori Academy. The remaining two charter schools in this area have full campuses and long wait lists: Cardinal Charter Academy & Peak Charter Academy. These represent families that are not happy with their public school choice, and are seeking another option. These two charters also do not offer a high school, which JLA plans to add yearly after our initial K-8 opening. Chatham County has a total of 3 charter schools. These schools represent challenges in distance (Chatham Charter is 40 miles away from our proposed area), pedagogy (Willow Oak Montessori may not be the first option for many families), or wait lists (Woods Charter has been full for many years).

Part of Cary is located in Chatham county. Chatham Countys website states that "the number of Chatham County residents living inside Carys town limits increased from just 19 people in 2000 to over 1,400 in 2010." That number continues to grow as several developments move forward in West Cary. Families in this area are districted for Chatham County Schools despite their close proximity to Wake County Schools and communities. Providing a neighborhood option would benefit several families and contribute to our small community feel. It would also highlight the ability of charter schools to quickly respond to changing population needs.

Easing overcrowding is not the sole mission of our charter, though the charter will help ease schools past capacity. With larger schools comes greater difficulty to establish close personal relationships, necessary to challenge, engage, and support our students. Our adherence to small numbers, and developing meaningful lives and relationships are a key component in educating our students.

- 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).*

We have included the %ADM of both Wake County schools and a more focused area. This focused area includes Cary schools, Apex schools, and the Chatham county schools students would attend if they live in the Cary town limits located within Chatham county.

<http://www.wcpss.net/domain/100>

Year 1

Elementary: 450 students

.6% of Wake County Elementary ADM (74,572 students)

2.3% of Cary/Apex Elementary schools + North Chatham County (19,282 students)  
Middle School: 252  
.7% of Wake County Middle School ADM (35,922 students)  
2.4% of Cary/Apex + Pollard Middle School (10,624 students)  
Total: 702  
.64% of Wake County Elementary and Middle Schools ADM (110,494 students)  
2.3% of Cary/Apex + Chatham (29,906 students)

Year 2

Elementary: 450 students  
.6% of Wake County Elementary ADM (74,572 students)  
2.3% of Cary/Apex Elementary schools + North Chatham County (19,282 students)  
Middle School: 252  
.7% of Wake County Middle School ADM (35,922 students)  
2.4% of Cary/Apex + Pollard Middle School ADM (10,624 students)  
High School (Grade 9 only): 90  
.67% of Wake County Ninth Graders ADM (13,366 students)  
.59% of Cary/Apex + Northwood High School ADM (15,164 students)  
Total: 792  
.64% Of Wake County K-9 ADM (123,860 students)  
1.7% of Cary/Apex/Chatham ADM (45,070 students)

Year 3

Elementary: 450 students  
.6% of Wake County Elementary ADM (74,572 students)  
2.3% of Cary/Apex Elementary schools + North Chatham County (19,282 students)  
Middle School: 252  
.7% of Wake County Middle School ADM (35,922 students)  
2.4% of Cary/Apex + Pollard Middle School ADM (10,624 students)  
High School (Grade 9 & 10): 180  
.68% of Wake County Ninth & Tenth Graders ADM (26,360 students)  
1.2% of Cary/Apex + Northwood High School ADM (15,164 students)  
Total: 882  
.64% Of Wake County K-9 ADM (136,854 students)  
2.0% of Cary/Apex/Chatham ADM (45,070 students)

Year 4

Elementary: 450 students  
.6% of Wake County Elementary ADM (74,572 students)  
2.3% of Cary/Apex Elementary schools + North Chatham County (19,282 students)  
Middle School: 252  
.7% of Wake County Middle School ADM (35,922 students)  
2.4% of Cary/Apex + Pollard Middle School ADM (10,624 students)  
High School (Grade 9,10,11): 270  
.71% of Wake County Ninth - Eleventh Graders ADM (38,124 students)  
1.8% of Cary/Apex + Northwood High School ADM (15,164 students)  
Total: 972  
.65% Of Wake County K-9 ADM (148,618 students)  
2.2% of Cary/Apex/Chatham ADM (45,070 students)

Year 5

Elementary: 450 students

.6% of Wake County Elementary ADM (74,572 students)

2.3% of Cary/Apex Elementary schools + North Chatham County (19,282 students)

Middle School: 252

.7% of Wake County Middle School ADM (35,922 students)

2.4% of Cary/Apex + Pollard Middle School ADM (10,624 students)

High School (All grades): 360

.74% of Wake County Ninth - Eleventh Graders ADM (48,956 students)

2.4% of Cary/Apex + Northwood High School ADM (15,164 students)

Total: 1,062

.67% Of Wake County K-9 ADM (159,450 students)

2.4% of Cary/Apex/Chatham ADM (45,070 students)

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

Jordan Lake Academy will begin Year 1 as a K-8 campus. We will transition to a K-12 campus, adding a grade each year. Currently, there are no public schools using this model in Cary/Apex/East Chatham. We believe this model offers greater stability, consistency, and support. This is especially important for middle and high school students who face a range of social and emotional challenges. We also believe students who attend our school receive a consistent message in their schools expectations, pedagogy, and values from kindergarten to graduation.

Our pedagogy is very different from the other local education agencies. We are a knowledge based program. This means that we value what students know as much as we value how they know it. We believe that higher order thinking grows out of and is informed by context. No matter how well a student understands the theory of dissecting a text, the text will be meaningless if they know none of the key words. That basic knowledge and context is what allows theory to matter. Our focus on cultural literacy will deliver more than just context for learning theory as it will also give our students a rich background in often referenced literature and history.

JLA utilizes direct instruction. New material is taught to the whole class at once regardless of their individual level of comprehension. "The instruction that seems most efficient involves the teacher working with the whole class, presenting information in lectures/discussion and then following up with recitations or practice exercises" (Freiberg, 2010). This ensures that every student receives instruction from the teacher. This does not mean students are passively receiving information. Students should still be engaged with the learning process as a whole group. Those students in need still receive help through differentiation, small group work outside the lesson, and tutoring. Whole group instruction allows students to engage with each other, the teacher, and the lesson in a structured way that increases interest and success.

JLA also embraces processes as a necessary part of our pedagogy and mission. Anything that is done repeatedly requires a process at JLA. This includes logistical needs such as transitioning between lessons or lining up. Daily processes include board work, writing down homework, and cleaning up. Using

the same curriculum year after year makes students more comfortable as they already know the processes and expectation for the lesson. Teachers will receive training in aspects of power teaching which use processes for student engagement such as a call and response, buddy-teaching, and teacher mirroring. Processes reduce distractions keeping students focused and engaged.

Educators have a responsibility to mentor the whole child. Humans aren't born knowing how to navigate the complex social world in which we live, those are skills we learn as we grow. JLA will teach the whole child by providing an ethical framework in the Covey<sup>7</sup> Habits. This language, combined with cultural literacy, will be the shared and infused language of our school. Every teacher in every lesson every day will use the language as the first step in instilling our mission of personal responsibility, citizenship, and social skills.

The value of our educational approach is in its consistency in every classroom, and across grade levels. We hire individuals who share a passion for our mission. Our pedagogy is a non-negotiable for staff members. It works because students hear the same message, follow the same processes, and see the same approach year after year.

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.*

Improve student learning & provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system

We seek to improve student learning by providing a different educational

opportunity. We believe our methods of direct instruction, knowledge based learning, spiraled approaches, and high engagement strategies lead to growth, regardless of the different cultural and socioeconomic backgrounds our students come from. Our Core Knowledge curriculum use timeless tales that are culturally rich and diverse. "The achievement gap is chiefly a knowledge gap and a language gap. It can be greatly ameliorated by knowledge-based schooling" (Hirsch, 2016). Students with greater schema and vocabulary tend to excel. "Although it is true that the extent to which students will learn this new content is dependent on factors such as the skill of the teacher, the interest of the student, and the complexity of the content, the research literature supports one compelling fact: what students already know about the content is one of the strongest indicators of how well they will learn new information relative to the content" (Marzano, 2004). Our target area has a large immigrant population. By using a knowledge based curriculum we explicitly teach the shared knowledge, leveling the playing field for all our students. Only a well-rounded, knowledge-specific curriculum can impart needed knowledge to all children and overcome inequality of opportunity.

In addition to a knowledge based curriculum delivered through direct, engaging instruction, we will improve outcomes by supporting our students. We will do so by teaching values through meaningful teacher-student relationships. While smaller classrooms aid in this endeavor, a smaller school overall also helps to create an environment in which students and their families feel comfortable and can thrive. Among Wake Countys 113 Elementary schools, over half have a population of over 600 students, and 12% have populations over 900 (Facilities Utilization Report, 2017). We believe strong relationships prevent many misunderstandings and issues that can arise over the school year. When they do, our parents can be confident that it will be handled smoothly and quickly because we have developed trust in our community. Stakeholders will stay engaged when they see the school respond to their concerns.

Part of what we are offering parents is a different model when it comes to school size and grade levels. A common concern arises in discussions with area parents, not about class size but with school size. In a city that is rapidly growing and filling elementary schools sometimes as large as 1200 students, we are offering a stark choice - a school with 450 elementary students total and a K-12 on one campus with only 1,000 students total. The elementary model was proved successful by the Anthem South campus of American Leadership Academy where Mr. Enkey (JLAs future administrator) was Director (Lead Administrator) and knew every student and most families by name. Focusing on relationships is key in being able to appropriately engage, challenge, and support our students. "Students know when teachers care. Having this type of positive, caring, respectful climate is a precursor to learning. Without this sense of safety and control, there is little likelihood of learning" (David-Lang, 2013). Additionally, "Part of the climate of the classroom is affected by the climate in the school community. In one...study of 400 elementary schools ...the higher the level of relational trust among the school community principals, teachers, students, and parents the greater the student improvement" (David-Lang, 2013). Our mission is to create students with values that can then find success in college, careers, and homes. In this system our stakeholders feel like they matter, their voices are more easily heard, and their actions lead

to real outcomes.

### **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.*

We set specific goals to ensure we stay focused on our mission, as well as improve and refine the education we provide students. The lead administrator will be responsible for periodically reporting progress and objective data on these goals to the board.

Stephen R. Covey said "The main thing is to keep the main thing the main thing." The purpose of a school is to educate, academics are the "main thing." As such we have set the following goals in Academics:

- By Year 1, classrooms will grow the percentage of students meeting or exceeding proficiency by 2% on each quarterly Benchmark test.
- By Year 2, an average of 70% of students in grades 3-8 will be at or above grade level in Reading and Math.
- By Year 5, an average of 80% of students in grades 3-8 will be at or above grade level in Reading and Math

#### Operations:

- We will achieve an average daily membership of at least 93% as a school. Attendance is linked to academic achievement and is a sign of personal responsibility and good citizenship.
- To ensure we accomplish our mission of partnering with parents, we will have a 90% satisfaction rating from parents with at least 50% of parents responding to our survey.
- Relationships require consistency in our faculty. Our teacher retention rate will be above 90% with retention defined as a teacher we want to return, who chooses to return.
- To further aid in retaining good educators, staff satisfaction will be at least 75% with 100% of staff responding.
- Professional Development will be ranked as "Targeted" and "Effective" by 90% of teachers.
- 100% compliance with all Federal, State, and local laws and regulations.

#### Finance:

- Jordan Lake Academy will remain at 95% of capacity to ensure financial stability.
- The school will receive an annual audit.
- The school will remain in good standing with any creditors and partners including the Department of Public Instruction for the State of North Carolina.
- By year five the school will qualify for a public bond.

#### Governance:

Each Board Member will attend at least 5 hours of Professional Development.  
- Board Members will maintain at least 95% attendance at board meetings.  
- A board member will attend each meeting of the Parent Service Organization.

Success in college, career, or personal fulfillment  
-95% of students will be able to identify and state the Seven Habits of Highly Effective People.  
-100% of staff hired will receive training in the Seven Habits of Highly Effective People.

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

The goals listed and created by the board were chosen because we believe that completing them will help us to fulfill our mission. As such the monthly board meetings will center around evaluating the progress of the charter. Each Director will be assigned an area for specific oversight (Mission, Academics, Finances, Operations, Governance). This will allow the Director to develop an area of expertise and ensures that no area is overlooked. As Aristotle taught "what is equally owned is equally neglected." By assigning ownership no goal or effort will be neglected. Some of these areas may be further broken down or assigned to committees to provide appropriate oversight and progress monitoring. Although each member of the board will have at least one area of specific ownership, the whole board is responsible for the whole school. Each member is still responsible for the good governance of the charter and decisions will be made by the entire board not by committees or individuals.

The SMART goals identified for the charter are measurable and timely. As such they are ready made for progress monitoring by the board. Each month the lead administrator will prepare and provide a standard presentation reviewing the goals and the progress being made. The data behind the presentation will be available to the board at any time but will only be compiled monthly. This presentation will be shared with the board prior to the board meeting so they have time to process the information and come prepared to discuss it. As time progresses, data will be compiled to view trends and help the board in guiding policy or setting priorities for the administration.

Working with the lead administrator the board will create a list of key indicators behind each goal. These indicators will be data points that indicate the progress being made on accomplishing one of the boards stated goals. For example: Our internal benchmark testing (Galileo ATI online) tells us the proficiency standard for each student on each state standard. Taken in aggregate it reveals the proficiency level of the student, class, grade level, and school. These are key indicators that would reveal our progress on averaging at least 70% of students being proficient by year two. This data will guide the board in knowing when to set new goals (if we are 85% proficient our first year, then the above goal should be adjusted).

Key indicators will include student academic data from internal (ATI online, DIBELS) and state assessments (EOG, EOC), attendance, discipline referrals, enrollment numbers, event attendance, financial records, and survey data. The indicators will be regularly assessed to determine if they are helping

us to accomplish our mission.

In addition to gathering data the board will also hold public comment at the beginning of each board meeting and elicit feedback from the Advisory Board. Time will be set aside at each board meeting to hear public comment. This will give the board an opportunity to directly hear the voices of the community. The board will also hear from the Advisory Board. This is a board created by the Board of Directors that contains parents and community members. The Advisory Board reports directly to the board and can be used as committee members. They also serve to give the board unfiltered feedback on the community's view of the school. The Advisory Board is further discussed in the governance section.

Members of the governing board will be active participants in our community. Through interactions with parents, students, and staff, our board members should be able to feel and see the culture of the school. As Peter Drucker said, "culture eats strategy for breakfast." If our culture is right, we will find the best path forward. Parents will be active partners and students will be excited to come each day.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
The mission statement appears to be more for the board than for the school itself. It doesn't address what the school is setting out to do in order to transform and be different than other schools.	Shannon Sellers	Mission Stat
Is this mission statement for the school or the board of directors?	Jennifer Gnann	Mission Stat
The mission statement feels a little weak to me.	Steven Walker	Mission Stat
What does it mean for your school to have a "moral focus"?	Deborah Brown	Mission Stat
Purpose is not clear. Do not see the need or urgency for this charter as a means to help with waitlists.	Heather Soja	Mission Stat
Mission needs additional clarification- it's unclear exactly what the focus of the school will be.	Danielle Allen	Mission Stat
The mission statement focuses more on inputs (i.e. Covey, relationships) rather than outputs and does not describe or express the schools' lofty purposes or paint a picture of how the school will be transformative and evidence high expectations. More attention and thought should go into what fundamentally the group believes about education, and the possibilities of a good quality rigorous ed plan.	Tracy Kelley	Mission Stat
The rationale for the school is confusing and contradicts itself. The application states that smaller school setting is needed, but your projected enrollment is 702. How is this a smaller setting? How will your educational plan differ from the LEA? The survey conducted doesn't prove that a school is needed nor does it help support your projected enrollment. What is your target population?	Shannon Sellers	Educational
The demographic evidence for why the communities need a charter school are not compelling, especially since the application states that "diverse relationships are best cultivated in a smaller school setting." but the proposed school will open with 702 students and grow to 1062 students. It's not clear what point the team is trying to make by stating that 20% of Cary residents were born outside the country and 22% speak a language other than English, especially since this does not align with the racial and ethnic breakdown showing the 72% are white; 8% African American and 13% Asian. What point is the team trying to make? The team does not indicate that there is low socioeconomic status in the community as a reason for more school options. The team indicates that "easing overcrowding is not the sole mission" of the proposed school and seems to make the case against larger schools because they "have greater difficulty establishing close personal relationships". So why do you want to open this school? Why is there no description or data presented showing academic performance of the LEA schools in the area or the few charter schools, either? Who and what students will the school be targeting, and why?	Tracy Kelley	Educational
How is this school different from traditional public schools other than the grades served?  How many people returned the survey?	Jennifer Gnann	Educational
Given the proximity to the Durham County border, would the school consider including Durham families? Given the large number of Asian families in the Morrisville area, and the number of cultural resources available, why is a new school the best vehicle for cultivating diverse relationships? If the school's mission is to encourage diversity, how will reflecting the area's 73% white population accomplish that goal? How will new schools opening up in this area of Wake solve the overcrowding issue without the need for a charter?	Deborah Brown	Educational
The mission is not clear: relationships and effective curriculum.	Heather Soja	Educational
Given the racial demographic data presented (and the stated desire to foster a community that celebrates a variety of cultures, languages, and histories), how will school work to ensure a diverse student population?	Danielle Allen	Educational

<p><b>700+ students is quite a sizable student population, but the applicant gives several reasons why larger schools are ineffective. Please clarify.</b></p> <p><b>"Focus on cultural literacy" is unclear.</b></p> <p><b>Data on the academic performance of schools in the area surrounding the proposed school would be helpful here.</b></p> <p><b>Additional clarification needed on how the school's ed plan differs from the LEA.</b></p> <p><b>Survey data doesn't support the ambitious student enrollment projections, especially for year 1.</b></p>		
<p><b>If your school will be 73% white, like the local LEA, why is a curriculum that works to overcome the achievement gap the best fit?</b></p> <p><b>What "values" do you propose your teachers will cultivate? How will you "develop trust" in your community?</b></p> <p><b>What legislative purpose are you working on, other than expanding a choice of a small school?</b></p>	Deborah Brown	Purposes of
<p><b>How will you improve instruction?</b></p> <p><b>Why is this school needed if parent concern is school size, when your school will be large as well?</b></p>	Shannon Sellers	Purposes of
<p><b>According to the previous section, there are virtually no cultural or socioeconomic background differences or targeted student populations, so how will the community of parents know that your proposed school is going to be different? What evidence do you have to substantiate the statement that "our target area has a large immigrant population? The plan is for the school to have 26 kids in a classroom, why does the team claim to have smaller class size than LEA if over crowding is not a problem? What specific concerns do parents have with school size?</b></p>	Tracy Kelley	Purposes of
<p><b>Charter schools are generally smaller schools. The mission and purpose of this school is not clear.</b></p>	Heather Soja	Purposes of
<p><b>How do you propose achieving a 90% teacher retention rate, when the retention rate for the area is well below that?</b></p> <p><b>If one of your goals for choosing your curriculum is that it is effective in reducing the achievement gap, how do these goals and benchmarks show growth for minority populations?</b></p>	Deborah Brown	Goals for th
<p><b>Not all goals are measurable. Finance leaves a lot of questions.</b></p>	Heather Soja	Goals for th
<p><b>The goals appear to be reasonable.</b></p>	Steven Walker	Goals for th
<p><b>The mission statement mentioned personal responsibility, citizenship, social skills, and a moral focus- has the board considered creating any goals to measure the school's success in imparting those skills to students?</b></p>	Danielle Allen	Goals for th
<p><b>How is this application different from the application last year for Liberty Leadership?</b></p>	Deborah Brown	Certify Miss
<p><b>Mission and purpose remains unclear so far in application.</b></p>	Heather Soja	Certify Miss
<p><b>Why is the school needed?</b></p> <p><b>If size is a concern for parents, how is a large K-12 school different?</b></p> <p><b>Goals aren't clearly aligned.</b></p>	Shannon Sellers	Certify Miss
<p><b>There significant statements that do not align with facts and data especially with regard to demographics and rationale and mission description. The purposes are further evidence that the team lacks a focus and clarity as to why the school is necessary.</b></p> <p><b>The claim that a large k12 with 1000 students is somehow ok but a large K-5 or K-8 with a 1000 student is not is a distinction in search of a difference. The purposes are not clearly aligned to the proposed mission. Evidence of need is not compelling as the team only provided a summary of the comments received and no actual surveys, sign in sheets, agendas, name tags, pictures etc were</b></p>	Tracy Kelley	Certify Miss

<b>provided showing that families support the new school proposed. The summary comments provided to not speak to academic performance at all.</b>		
<b>Mission and need for the school are unclear. Applicant should provide additional evidence for the need/desire for a school of this size, in this particular location.</b>	<b>Danielle Allen</b>	<b>Certify Miss</b>

<b>Reviewer</b>	<b>Score</b>
Steven Walker	Pass
Deborah Brown	Fail
Danielle Allen	Fail
Cheryl Turner	
Alan Hawkes	
Alex Quigley	
Deborah Brown	
Ginger Cash	
Stephenie Clark	
Shannon Sellers	Fail
Shannon Sellers	
Lynn Kroeger	
Tracy Kelley	Fail
Joe Maimone	
Jennifer Gnann	Pass
Heather Soja	Fail

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

We seek to challenge, engage, and support our learners. Our instructional program uses systematic, explicit, direct instruction delivered mostly in whole group settings. We do not rely exclusively on this, but studies show that "students taught with a structured curriculum do better than those taught with individualized or discovery learning approaches, and those that receive much instruction directly from the teacher do better than those expected to learn on their own from one another" (Frieberg, 2010). Additionally, "scientific research reviewed by the National Reading Panel revealed that the most reliably effective approach is systematic and explicit learning instruction" (Learning Point Associates, 2004). Direct instruction does not mean lecturing to a room. We believe these wise words should reflect in instruction "Tell me and I forget. Teach me and I remember. Involve me and I learn." Our Saxon Math and Core Knowledge Language Arts (CKLA) curriculum includes lessons, assessments, homework, small group work, and differentiated ideas for exceptional students or ELLs. Because of this, teachers can devote less time to developing or finding quality resources and more time adapting the lesson to fit individual student needs. We value the CKLA website's statement that "teachers are expected to take more and more ownership of the program as they acquire experience teaching it. CKLA lessons provide a detailed roadmap to what to teach, freeing teachers to focus on their students. This supportive lesson structure cannot, and was never designed to, replace good teaching. Good teaching will make the activities and lessons come alive in ways that are specific to the classroom, teacher, and students." (Core Knowledge FAQ, 2017). We believe this mindset can be replicated with other resources and curriculum.

This mindset is especially important in our location of Cary, one of the fastest growing cities in our country. Many families in this area are moving not only from other states in our nation, but other countries as well, with nearly 16% of Cary residents born outside the US. Creating a close community that both values a child and meets their individual needs is important. Our culturally rich content knowledge from CKLA meets language standards while also ensuring students "grasp the importance of diversity to human history and current affairs" with units on American History, classic literature, differing religions, and contributions from diverse peoples. (Core Knowledge FAQ, 2017).

Although both Saxon and CKLA come with assessments, we expect teachers to informally assess frequently throughout their lessons. Strategies may include turn and talk, whiteboard answering, or class discussion. Core

Knowledge provides placement assessments for early reading skills, comprehensive unit assessments, and progress monitoring tools. Saxon Math provides cumulative tests after every five lessons. Knowledge is spiraled throughout the year in incremental "bites" rather than an entire unit at once. We feel this benefits a growing population who would otherwise miss entire units of learning.

Outside of this curriculum, students will also receive DIBELS testing, Galileo testing, and CogAT testing. DIBELS testing will inform small group remediation for key reading skills in phonics, decoding, fluency, and comprehension in every grade level. Galileo testing is provided through Assessment Technologies Incorporated (ATI). These quarterly benchmarks are aligned to state standards and are taken by 3rd-5th grade. Analysis of results provides a clear picture of which students need support with which standards, preparing students successfully for EOG goals. Students who need greater challenges will be identified through CogAT testing in third grade. We feel that these instructional methods and assessment strategies are beneficial for any student that walks through our doors, regardless of ability, demographics, or previous learning.

### **Curriculum and Instructional Design:**

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

The learning environment we seek to create supports our mission to engage and support students in developing strong ethics. We focus on strong relationships to create a supportive and engaging environment.

At the elementary level students will receive direct instruction in self-contained classrooms with a single teacher. We consider full class sizes to be: Kindergarten and first grade with 22 students, second and third grade with 25 students, fourth and fifth grade with 28 students. Our budget allows for SPED aides and Instructional assistants in the classrooms as well.

At the middle school level, students will receive direct instruction in departmentalized classrooms focusing on one academic subject. This direct instruction approach will also frame Social Studies, Science, and elective classes. We anticipate no more than 84 students per grade level dispersed among their classes (3 groups of 28 per grade level).

At the high school level, students will receive direct instruction in departmentalized classrooms focusing on one academic subject. We anticipate roughly 90 students per grade level dispersed among their classes (3 groups of 30 per grade level).

We aim to keep the total population of schools small to aid in development of close relationships, safe environments, and supported students.

Instruction is mainly delivered through a whole-class delivery at desks, tables, or on a large floor space. We believe there is value in allowing students to master the knowledge delivered through direct instruction. This means we must have space for students to both receive instruction, and then work either independently or in small groups with other students, teachers,

or aides. Though we rely on the more traditional delivery of direct instruction, that does not mean students are passive and in assigned seats for the entire duration of the school day. Movement and a variety of learning spaces allows for better engagement. Classrooms should always be clean, well organized, and free from distractions. Teachers will greet their students at the door and welcome them to class each day. The environment of the class should always be warm and inviting.

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.*

Our mission is to support, engage, and challenge our students. When challenging our students, we expect them to become critical thinkers. If we expect students to think critically, they must have something to think critically about. The Core Knowledge website asserts typical state standards may read "Students will demonstrate knowledge of people, events, ideas, and movements that contributed to the development of the United States. But which people and events? Which ideas and movements?" Our curriculum gives students the raw material on which to begin thinking critically. The Core Knowledge sequence will be used for reading and writing instruction with several cross-curricular topics in Science and History. We start first with the content knowledge, and the necessary reading skills are naturally highlighted, explained, and solidified through various texts.

We support our students with spiraled learning. Brain researchers have shown that new material is more easily recalled and used when one already has some knowledge of the topic. New learning is connected to prior knowledge. This idea is represented with the scope and sequence of Core Knowledge Language Arts sequence, as well as Saxon Math. Background knowledge flourishes with the culturally rich texts of CKLA. Additionally, skill practice repeats in the variety of texts throughout the entire school year, rather than focusing on one standard per unit of instruction. Saxon Math spirals curriculum, which allows students to build knowledge incrementally. We believe all students have strengths even when they struggle with a subject like Math. Saxon allows these students to experience those successes more frequently when they are not overwhelmed with weeks long units on a single standard. Instead, students build knowledge across the standards in small bites, and are led to mastery of all units by the conclusion of the year. The structure of individual lessons also supports students with plenty of time for guided and independent practice, enrichment lessons, ideas for ELL students, and supports for students who struggle.

We engage our students by highlighting cultures from around the world. The foreign born population in North Carolina, and particularly Cary and Apex, has exploded in recent years. Core Knowledge represents myths, legends, biographies, and other fiction and non-fiction texts to represent these

populations and connect students to prior knowledge. Culturally rich knowledge also means these students are well versed in American culture. Stories include everything from an Indian fable "The Blind Man and the Elephant", to the Mexican folktale "Three Words of Wisdom", to the American tall tale of John Henry.

Students at JLA are also engaged through our method of direct instruction for all subjects. With training, practice, and effective curriculum, our teachers use a variety of practices to ensure students are engaged and mastering content in their classrooms. Teachers present the learning goal and information, with periodic pauses for students to own the knowledge. Students gain ownership of the information presented when they can teach it to a classmate, show it through writing, or explain it clearly with examples. Direct instruction includes guided practice that leads students to individual mastery of the content knowledge.

Jordan Lake Academy seeks to support, challenge, and engage our students through our curriculum, instructional practices, and attention to culture.

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

We believe "the climate in the classroom [is] one of the more critical factors in promoting student learning. When students are asked to name a teacher who most impacted them they typically name those who cared or believed in me. Students know when teachers care" (David-Lang, 2013). This climate extends beyond the classroom as well. Testing is not our only focus as we seek to create a space where our students feel safe, supported, and engaged.

Our educational philosophy uses content rich and moderately scripted curriculum in a whole group setting. To be successful, teachers will need to have excellent classroom management and student engagement skills. JLA will provide training on classroom management strategies such as Whole Brain Teaching (also called Power teaching), or Kagan Cooperative Learning. Both of these examples and other possible training we may provide will focus on engaging every student during whole group instruction, rather than calling on one student at a time. We feel these strategies are beneficial for elementary through high school age students. When teachers know how to engage the class, regardless of ability, differentiation can occur for those who need extra challenge as well as for those who need extra support.

Teachers will be trained in the Covey Seven Habits, particularly in developing personal mission statements and SMART goal planning. Teachers become the model for students in setting personal, class, and school goals and working toward accomplishing them. When students own their own academic growth - that growth accelerates.

Additionally, we expect our teachers to be masters of the curriculum or subjects they teach. At the elementary level, we will provide training on using the Saxon Math program, Core Knowledge Language Arts, and any other curriculum we adopt for the classroom.

- 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.*

A benefit of using the Core Knowledge sequence is that it builds from year to year with both content knowledge and skills application. The same is true of Saxon Math. The spiral nature of the curriculum we have chosen constantly circles back on previous concepts identifying gaps in knowledge and skill, and addressing those deficits. Every year is the most important year for student development, the most important grade for development is whatever grade your student is in. Still, students may have off years, or come to our school with gaps. This curriculum allows us to bring students up to grade level, but also allows the school flexibility and confidence that students can close gaps over time.

This makes end of year promotion discussions less high stakes. If we know the areas of need for a student, then we will design a plan to address those needs and default on promoting students. The literature shows the benefits of retention fade quickly after two years. Summer school, intervention plans, a student success team, and tutoring are just a few of the tools that will be deployed to help students gain proficiency. Every student and situation is unique, and there may be cases where it is in the best interest of the student to be retained. Those discussions will be held with the parents, teacher, administrator, and student support staff.

Our promotion requirements are built around attaining proficiency on EOG assessments. Jordan Lake Academy's internal assessments (ATI Galileo testing) are designed to match as closely as possible with the state EOG assessments. By using Galileo assessment data we can accurately predict if students are prepared for the next level of material. Additionally, these assessments allow teachers to modify instruction or organize small groups to fill gaps in knowledge. At the high school level this same data will give us confidence that our students are ready for their post graduation plans in college, careers, and family. JLA is a data driven school that will also rely on DIBELS data, unit assessments from Core Knowledge and Saxon Math, and teacher observations. Our goal is to prevent retention by setting up students for success with our curriculum, use of data, and responsive interventions.

Graduating students that do not meet the North Carolina requirements does not fulfill JLAs mission. Seniors dont become proficient in one year, they also dont lose proficiency in one year. Typically these are students that have fallen through the cracks or been allowed to fail for some time. One advantage of growing to a K-12 is that these students will be served by the same administration and staff for their entire schooling. Students that tend to get lost in the middle schools years will still be known by their administration all the way through high school. This is a more efficient system where institutional knowledge is leveraged in favor of the student.

*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?*

Beginning in the 2020-2021 school year JLA will offer 9th grade and begin adding a grade each successive year. JLA will enable its students to meet the Future-Ready Core requirements by providing the needed course offerings. Each year high school students will take 7 courses. Core courses required are a Math, English, and Social Studies course each year in addition to a Science course 3 out of 4 years. Students are also required to take 1 Physical Education course. Students must also choose 2 of the following electives: Career and Technical Education (CTE), Arts Education, or World

Languages. We seek to offer Arts Education courses in Choir, Art, or Theater. We plan to offer Spanish to start. Student must also complete 4 additional electives for a total of 22 credits in order to complete the Course of Study Requirements for a Future Ready Core Diploma. Other electives will include Leadership and Creative Writing. For students who are below grade level in Math or English, "lab" remediation courses in those areas will be required as their electives until they reach proficiency. As we grow and hire more electives teachers, we hope to offer CTE choices, Band, Orchestra, Dance, Photography, Technology, or other courses that will engage and challenge our students as they prepare for college and career. A course will last one full school year, and completion of the course with a passing grade earns a student 1 credit. Grade point average will be calculated following a ten point scale with Honors courses weighted for an additional point.

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.*

Our calendar supports our mission and goals by supporting professional development, preserving processes, and inviting balance for our students and staff.

#### Professional Development

JLA's success depends on its teacher corps. We invest heavily upfront in developing teachers ability in classroom management, student engagement, leadership, and our curriculum. The two weeks prior to school starting are set aside for on-boarding, team building activities, and professional development. Throughout the year half days are set aside for further Professional Development.

#### Process and Routines

Smooth operating depends on processes that we will instill in our students. While the calendar has much needed breaks spread throughout the year, they are not of such a duration that those processes will be lost. JLA knows through experience that any time students return from a significant break time will have to be invested re-establishing routines. We are confident that our breaks strike the correct balance to allow students to reset while not affecting the smooth operation of the school.

#### Balanced Life

Coveys Seventh habit is "to take time to balance your life by sharpening the saw." Breaks are important to allow students and staff to reset and come back focused and refreshed. Part of our mission is to support and engage students. That will require time to reflect, relax, and regroup.

With these supports in place our proposed calendar will allow us to fulfill our mission and deliver great academic results.

The calendar allows for the minimum 1,025 hours of instructional learning.

## **Special Programs and "At-Risk" Students**

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

The school will have a Student Success Team (SST) in place as a support for teachers seeking interventions for students that need extra support, as well as providing a way to document and move students towards Exceptional Education testing if recommended by the team. The team is composed of a representative from each grade level, a special education teacher, and either the Assistant Administrator or Lead Administrator. Other support staff may sit in if it will be a benefit to the student/teacher. Meetings will occur regularly and teachers must bring documentation of any implemented interventions, student work samples, and observations.

Initial submissions for SST will come from 45 days screeners completed by teachers. These must be completed within the first 45 days of the child's first day of their first year of attendance. The screeners allow educators to note concerns about vision, hearing, motor skills, communication, social skills, and cognitive skills. A student may be submitted to the SST process at any point in the school year, and added to the SST teams regular schedule. Teachers need to provide documentation of any norms not being met, and interventions used prior to meeting. The SST team will brainstorm interventions to implement and reconvene in about 6 weeks time, at which point the team must agree to try new interventions, continue with the original recommendations, or move forward with Special Education testing. In addition to the 45 day screeners, teachers determine the need for an SST meeting based on Quarterly assessments, informal assessments, and student work samples. Teachers can also request assistance from the SST process for disruptive behavior after consulting with administrators, communicating with parents, and documenting interventions and behaviors. The wide range of student needs, abilities, and challenges necessitates a wide range of possible interventions. Relying on the expertise and experience of several educators will lead to successful interventions such as behavior plans, preferred seating, extended time, mentor teachers, etc.

Intellectually gifted students will be identified using the CogAT test, administered to all 3rd graders. Students that qualify will receive services in reading or math by a qualified AIG teacher. Students can also be identified by informal observations in class, formal and informal assessments, and teacher recommendation.

Because we value small schools and close relationships in the development of a meaningful life, we also trust that our culture will make "kid-watching" the standard. "Kid-watching" means that we as adults; whether teacher, administrator, or parent, know our students closely. We know their academic abilities, their strengths, their struggles, their relationships, their successes, their goals, their preferences. We know them well enough that when a student is falling below expectations or seeking extra challenge and growth we can reach out and intervene in time. This culture coupled with the processes listed above create a supportive environment for our highest achievers and struggling students alike.

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.*

ELL students will be identified with a language inquiry form included with the initial enrollment forms. This language inquiry form will be completed annually by families. Parents/Guardians will be asked if English is their first language, and if English is the main language spoken at home. Any families that speak English as a second language or speak another language at home will be offered services. Families may decline services if desired. Jordan Lake Academics use of culturally rich language arts curriculum that builds context is especially beneficial to students who come from different cultural backgrounds. The Assistant Administrator is responsible for tracking and documenting the progress of ELL students. Each identified student that accepts services will have an Individualized Language Learner Plan (ILLP). The ILLP will set out goals and accommodations for the student. The Assistant Administrator will ensure that the educational needs of the student are being met in the least restrictive environment. The Assistant Administrator will ensure that ELL students are assessed for their ILLP goals. As goals are met, new goals will be set. The overall goal for every student is to be able to fully function in a regular education classroom without support. As students reach full fluency and proficiency on their assessments (internal and state) they may be placed off the active ELL caseload and into the monitoring caseload. ELL students that exit the active caseload will be monitored for two additional years. If during that time they fail to gain proficiency they will be considered for additional services.

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

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

The intellectually gifted students may be the least well served in our educational system. Jordan Lake Academy will identify these students through teacher observation, assessment data, and parent surveys. Our main form of identification will be through CogAT testing administered at the beginning of students third grade year. Too often gifted students are either given more work to keep them busy or are pushed ahead in the educational program. Giving gifted students extra work can make them feel punished for being smart. Pushing them ahead of their peers can exacerbate the problem, although at times it may be appropriate. Every student is unique and what is good for one may be detrimental to another. JLA plans to hire a qualified AIG instructor to provide services to grades 3-5, and may push in to classes depending on population and identified areas of giftedness in students. If we have a large enough population, our AIG teacher will pull small groups during the built-in Intervention/RTI time of the day to provide enrichment for our gifted students. We also plan on having our AIG teacher work with

grade level teams through training or assistance with planning to better support gifted students and their teachers within the General Education classroom. Training will focus on modifying assignments to ensure appropriate challenge levels for our gifted students. Saxon Math and Core Knowledge both provide lessons and extensions for gifted students that teachers can implement within their classrooms. We plan to adapt any additional services based on the unique needs of our students.

### **Exceptional Children**

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

### **Identification and Records**

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

Jordan Lake Academy will not deny admission to any student on the basis of special needs or disabilities. JLA will identify students previously found eligible for special education or 504 plan services during the enrollment process. To eliminate any potential for discrimination, this information will not be asked for until following acceptance. Once a student is accepted, they will complete a comprehensive enrollment application, including an educational history.

All special education personnel will be licensed and highly qualified pursuant to state and federal law.

Following acceptance to JLA, a formal request for student information will be made to the last school attended by the student. This records request will specifically petition any information pertaining to the student, including, but not limited to, academic performance, receipt of services, supporting documentation for services received (IEPs, 504 Plans), and applicable health information. The Office Manager for JLA will bear the primary responsibility for requesting student records. Where necessary, the Special Education Case Manager for JLA will contact the previous school directly to obtain documentation. JLA will also work directly with the parent or guardian of the student to obtain any pertinent information and ensure continuity of services.

To ensure that all student information is properly safeguarded, all records with personally identifiable information will be stored in locking cabinets in locking records rooms located in the front office. Special Education records necessary for the proper development and implementation of IEPs will be stored in locking cabinets in the special education case managers office. The schools fax machine will be located in a private section of a locked, back office to ensure that incoming student records remain confidential until they can be properly archived in the appropriate location. Case managers will also have access to their own private printer/fax machines.

The most current version of a students IEP or 504 plan will be uploaded to the schools student information system. JLA plans to purchase a Special Education software. The software will only grant viewing rights to employees required to view the documents, such as teachers or case managers, and no one else. By utilizing a secure software and its integrated rights management, JLA will eliminate risk of the obsolescence of documentation as well as risk of accidental display or loss of confidential student information inherent in physical paperwork.

All staff will accept and abide by strict student confidentiality guidelines as a condition of employment. Failure to comply with student confidentiality laws and policies may result in the termination of employment.

JLA will engage in the requisite Child Find procedures through the use of "45-Day Screener" forms assigned to each general education teacher. These forms will be completed and returned to the Special Education department no later than forty-four days following the students first day of school. Additionally, students may be referred for evaluation at any time of the year. Particular attention will be given to students who are not meeting grade level norms with interventions or who display significant testing disparities.

Only eligible students with disabilities and appropriate documentation on an IEP or 504 may receive accommodations during assessments and state testing. We do not assume every child with a disability requires accommodations. Teachers, proctors, and other school personnel will receive training to properly administer tests with accommodations. We intend to plan early, and request only necessary accommodations. Students who receive accommodations should receive them regularly throughout the school year. Possible accommodations may include: read aloud for math, large print tests, or small group testing.

### 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.*

JLA will provide the full continuum of services necessary for students with disabilities through licensed and highly qualified school personnel, third-

party service providers, and a carefully designed program of instruction and assessment.

JLA will hire licensed and highly qualified Case Managers (Special Education teachers) to oversee the development and implementation of IEPs. Each case manager will have a maximum caseload of twenty-five students to ensure adequate attention is provided to each student. Under the supervision of these case managers, highly qualified paraprofessionals will deliver personalized instruction in a mixed pull-out, push-in format; as dictated by the needs of each student.

JLA will also contract with third-party related services providers as needed. These providers include speech and language therapists, occupational therapists, physical therapist, school psychologists, and other specialists as determined by the IEP of each student. These specialists will be licensed and qualified to deliver services within the State of North Carolina. Specialists will be chosen following approval of the charter contract, but no later than one month prior to the commencement of operations. Each related service contractor will be evaluated annually and resigned or terminated based on the outcome of those evaluations.

In order to ensure that all students receive a Free and Appropriate Public Education, JLA will ensure that all aspects of the child's IEP are fulfilled, including transportation services, related services, medical supports, assistive technology, and all other elements explicitly prescribed in the IEP document. Our staff will include a properly licensed school nurse who shall attend to specific medical needs of students, as necessary.

The IEP shall be recorded and monitored within the school's student information system or other comparable software. Parents will receive regular progress reports which shall be physically mailed in sealed envelopes to parents at the prescribed intervals, unless specifically requested electronically. Each Special Education Case Manager shall maintain an ongoing progress report for each child in their caseload and report key performance indicators such as IEP goal attainment, IEP goal growth, student academic growth, student academic performance, time provided with related service providers, and special education exit rates. These key performance indicators shall be reported to administration quarterly. Administration, in turn, will update the board on the progress of the school's special education population.

### **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.*

Performance Standards for Jordan Lake Academy include Benchmark testing throughout the year as well as State EOG testing. Performance Standards will be reviewed and modified at the conclusion of the school year by the Board to ensure we are setting and meeting high expectations for ourselves and our students.

By Year 1, classrooms will grow the percentage of students meeting or exceeding proficiency by 2% on each quarterly Benchmark test within one school year.

We will contract with Assessment Technology Incorporated to provide quarterly Benchmark testing (Galileo tests) in Reading and Math for Kindergarten through 8th grade, as well as Science for grades that receive an EOG or EOC in that subject. The results of this testing can provide valuable information at the school, classroom, and individual student level. Teachers can pinpoint specific standards based on data results which outline which students struggled or excelled with which standards. The results of these Benchmarks will guide our PLC agendas, Responses to Intervention, and differentiation within the curriculum. Intervention time is set aside for teachers to work with small groups to remediate or enrich.

By Year 2, an average of 70% of students in grades 3-8 will be at or above grade level in Reading and Math.

Chatham County and Wake County will be our two closest LEAs. We have determined our performance standard based on their 2014/2015 EOG results below:

Chatham County Schools -56.8% of students grades 3-8 were at or above grade level (Level 3,4, or 5 on EOG) in Reading.

Wake County Schools - 66.7% of students grades 3-8 were at or above grade level (Level, 3,4, or 5 on EOG) in Reading.

Chatham County Schools - 55.6% of students grades 3-8 were at or above grade level (Level 3,4, or 5 on EOG) in Math

Wake County Schools - 64.8% of students in grades 3-8 were at or above grade level (Level 3,4, or 5 on EOG) in Math.

By Year 5, an average of 80% of students in grades 3-8 will be at or above grade level in Reading and Math.

Promotion of a student can occur through various avenues. Promotion criteria will be communicated to parents in our Student Handbook. Additional letters will be sent to parents of third graders regarding Read to Achieve laws.

Students who score at or above grade level proficiency in both Reading and Math EOGs or EOCs in every grade level will automatically be promoted.

Third grade students must meet the requirements set forth in the Read to Achieve laws.

Students who are not proficient, but show significant growth based on Benchmark scores and other work samples may also be promoted at the recommendation of the teacher and Lead Administrator.

Students with disabilities may meet the requirements listed above. These students would also be recommended for promotion if the student has met the goals outlined in their IEP.

If a student is at-risk of being retained, we will know early on through our Galileo Benchmark testing and parents will be informed as soon possible. The teacher, parents, and other necessary staff members will meet to discuss a

personal plan which may include referral to the SST process. As often as possible, we seek to promote students and provide the structure and interventions necessary to help that student see growth. If the interventions and support do not result in the student meeting the requirements for promotion, a final decision will be made with the Lead Administrator, teacher, parents, and other necessary staff members.

**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.*

Effective discipline relies more heavily on preventative measures, rather than interventions. When we establish a culture that teaches students personal responsibility, citizenship, and social skills fewer conflicts escalate. We also know that when students have strong relationships with the teachers and staff members it prevents problems. A few of the ways we promote the desired culture and discourage preventable discipline issues:

All students begin each day with a mission statement that reaffirms our mission statement values. This will be developed by our staff members and revised or improved to fit our current students. Involving staff members in this development will lead to greater buy-in and more consistent and uniform adherence.

We hold Friday assemblies, where classes take turns presenting a skit, song, or other short performance on a principle from our mission statement, or one of Stephen Coveys seven habits.

Citizenship will be a Specials class that focuses on principles central to our mission.

Teacher training to incorporate our values in daily lessons.

A detailed code of conduct to be signed by both student and parents at the start of each school year. See Appendices.

The code of conduct will be adopted, written, and annually reviewed by the Board. Students who cannot follow the code of conduct will receive age-appropriate, consistent consequences dependent on the action and student. Students who commit a minor offense may receive: restorative practices, behavior contract, counseling, or loss of a privilege. Staff members addressing the behavior must contact parents, and document behaviors. Examples of moderate offenses include the following: dress code, insubordination, repeatedly distracting others, or obscene language.

Students who commit a major offense will receive the following consequences.

- First offense: 1 day in or out of school suspension
- Second offense: 3 day in or out of school suspension
- Third offense: 5 day in or out of school suspension

-Fourth offense: Long-term suspension, or alternative placement

Examples of major offenses include fighting, vandalism, or possession of drugs, weapons, or alcohol. JLA will follow the guidelines outlined in 115C-390.6 for short term suspension and 115C-390.8 for long term suspension. This includes opportunities for hearings and immediate parent contact.

The team associated with a student with disabilities must first determine if the behavior is a manifestation of the child's disability or a failure to implement the child's current IEP or 504. If so, a functional behavior assessment must occur if it has not already, and a regularly reviewed Behavior Intervention Plan must be established in accordance with the student's IEP or 504 plan as well as the School's Code of Conduct. Modifications to the BIP will occur if current interventions are not preventing or decreasing the behavior. Goals listed on the student's IEP or BIP ultimately have an expectation to help this child be supported while still adhering to and supporting the school's expected Code of conduct.

Parents of exceptional students have informal and formal methods to address concerns. Prior to filing for a Due Process Hearing, parents may seek to work directly with the teachers, administrators, or impartial facilitators. They may also dispute decisions through a mediation process. JLA will follow NC 1504-1.7 which states mediation is voluntary, does not delay or deny a Due Process request, and is conducted by a qualified and impartial mediator at no cost to the parents. Parents may also file a formal complaint or a request for a Due Process hearing with the Exceptional Children Division of NCDPI. We have 30 days to resolve issues before proceeding with the Due Process Hearing. Procedural Safeguards and Prior Written Notices must be provided by JLA to parents to inform them of their rights and of any evaluations, placements, or IEP changes.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
The data for your effectiveness of an explicit, direct instructional model is from 2004 and 2010. How will your program apply the newer data that shows personalized, experiential and project based programs often produce more student achievement? How does a "moderately scripted curriculum" allow for teachers to personalize for their own students?	Deborah Brown	Instructiona
What is the connection between the proposed instructional practices (Covey)and the schools mission? How will instruction be differentiated to meet student needs? What quantifiable research data do you have showing the proposed practices will support student learning?	Tracy Kelley	Instructiona
What evidence exists that proves this type of instruction will improve student performance?	Shannon Sellers	Instructiona
CK and Saxon math are vetted but implementation and teacher effectiveness matter. This school does not present as an innovative approach to learning in this area. Specifically, it will be situated in affluent areas and its main teaching strategy will be direct instruction.	Heather Soja	Instructiona
What evidence does the applicant have that the proposed approach will lead to improved student performance for the school's targeted population?	Danielle Allen	Instructiona
Please explain further how instruction will be differentiated within the classroom for students with different learning needs.	Jennifer Gnann	Curriculum a
How will the curriculum be differentiated to reach all students.	Shannon Sellers	Curriculum a
The curriculum framework is not presented clearly and does not align with the schools stated mission and goals The description of the curriculum lack sufficient detail to determine whether it is aligned across the school for all grade levels? What research do you have to support the chosen curriculum? Why was Saxon math selected, what other math curricula did the team consider?	Tracy Kelley	Curriculum a
Basic learning environment, class size, and structure described.  Unclear how the curriculum/instructional design and school calendar align with the full mission outlined at the beginning of the application. There was an explicit focus on relationships, personal responsibility, citizenship, strong academics, social skills, and a moral focus. Aside from perhaps the academic focus, it's unclear how this curriculum/calendar will help the school build relationships or cultivate personal responsibility, citizenship, social skills, moral focus, etc.  With such an explicit focus on direct, whole group instruction, more detail is needed on what differentiation will look like in the classroom, and what flexibility teachers will have to tailor instruction.	Danielle Allen	Curriculum a
The plan involves a purchased curriculum that is implemented through direct instruction. All students would mean that the plan thoroughly considered the varied learning styles and abilities of all students.	Heather Soja	Curriculum a
What training will be provided to staff regarding the use of evidence based practices? How will the implementation of teaching practices be monitored to ensure all students are receiving high quality instruction?	Ginger Cash	Special Prog
What critical systems, structures, processes (data, staff, time, meetings, protocols) will be in place to implement the "kid watch" efforts? How will the school define "at risk" for teachers and staff? How will school ensure 1st instruction is strong to avoid over diagnosis for SPED?	Tracy Kelley	Special Prog
There is a significant emphasis placed on relationship building and the value of a small school, but there doesn't appear to be the same emphasis placed on implementing a specific, actionable plan to help teachers build relationships with students. Kid-watching will be an important part of the fabric of the school- more detail on how this will be institutionalized and what systems will be put in place to ensure students don't fall through the cracks (because this school will be a large one) is needed.	Danielle Allen	Special Prog
How will AIG teacher's time be split between offering services to grades 3-5 and		

supporting teachers in the other grades?		
How often will the SST meet? HOW is the support provided to the student? What solid data is used during the 45 day screening? What interventions will be used? Who does the "kid watching" and what is used to determine if a student is struggling just by watching the student? What qualifications will the assistant administrator have that will make him/her qualified to work with ELL students?	Shannon Sellers	Special Prog
Once identified, what services/interventions will at-risk students receive? Where? By whom?  Applicant should explain their understanding of MTSS.	Jennifer Gnann	Special Prog
What is your process for reviewing files for compliance as students transfer in to your school? How will you document access to the EC folder for authorized personnel who need additional information? What is your process/procedure for handling referrals for testing throughout the year? How will EC services be delivered?	Ginger Cash	Exceptional
Nothing specific provided for programming and curricular specifics that support or enrich students with disabilities.	Deborah Brown	Exceptional
While paraprofessionals can provide instruction under the supervision of a licensed exceptional children's teacher, they can not be the provider of specially designed instruction. That responsibility falls to the licensed exceptional children's teacher and/or related service provider. You state that you will provide the full continuum of services. What is your process for allocating resources to provide the full continuum of services?	Heather Soja	Exceptional
While paraprofessionals can provide instruction under the supervision of a licensed exceptional children's teacher, they can not be the provider of specially designed instruction. That responsibility falls to the licensed exceptional children's teacher and/or related service provider. You state that you will provide the full continuum of services. What is your process for allocating resources to provide the full continuum of services?	Ginger Cash	Exceptional
What role do grades play in promotion if scoring at or above GLP in both Reading/Math means a student is automatically promoted? Is the EOG/EOC 100% the determining factor for promotion in those cases?  (How) Will the board measure students' growth towards stated mission (relationships, personal responsibility, citizenship, strong academics, social skills, moral focus)?	Danielle Allen	Student Perf
How often will benchmark test be given? How do you know Galileo test are comparable to the NC EOC/EOG's? How will teachers know how to use the data to drive instruction?	Shannon Sellers	Student Perf
What assurances does the team have that Galileo is a predictor of success on EOY state assessment? What will teachers do with the benchamrk data? How will teachers be coached on how to unpack the data and anlaze it? What structures, processess and systems will need to be in place in order for teachers to act on the data?	Tracy Kelley	Student Perf
What curriculum will be used in Citizenship class? What role will Covey play in creating and sustaining the school's culture? What and how and when willll the school teach the schools core values, pillars, norms, celebrations, common language and core beliefs in a grade appropriate consustent manner?	Tracy Kelley	Student Cond
Does the citizenship class have a curriculum?	Shannon Sellers	Student Cond
Will all students take Citizenship each year? Is there a specific curriculum for this?	Danielle Allen	Student Cond
How will you "establish a culture that teaches students personal responsibility, citizenship, and social skills?" What specific programs or methods will make this happen for your students? Will reciting a mission statement and seeing weekly skits accomplish this goal? How will you work on reducing the number of out of school suspension rates? Have you explored the newer research on how suspensions are often ineffective and newer programs, like restorative justice, can lead to better outcomes and reduced recidivism? 1 day of ISS for a first offense seems severe. What smaller steps might you employ to encourage students to modify behavior before moving to a suspension?	Deborah Brown	Student Cond
How will you determine At-Risk students and then what intervention is used to help them? The curriculum is confusing. Benchmark testing is not clear that it is effective in NC.	Shannon Sellers	Certify Educ
There is a plan because it is being purchased. Innovation is lacking given the number of charter schools in Wake.	Heather Soja	Certify Educ
The ed plan lacks evidence of effectiveness and provide insufficient details to assess	Tracy Kelley	Certify Educ

the quality of the proposed plan. There is significant aspects of the ed plan that do not align with the mission, includng culture/behavior, assessment plan, and at risk students.		
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<b>Reviewer</b>	<b>Score</b>
Deborah Brown	
Stephenie Clark	
Alan Hawkes	
Cheryl Turner	
Danielle Allen	Pass
Deborah Brown	Fail
Steven Walker	Pass
Shannon Sellers	Fail
Shannon Sellers	
Lynn Kroeger	
Tracy Kelley	Fail
Joe Maimone	
Jennifer Gnann	Pass
Heather Soja	Pass
Ginger Cash	
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:* Liberty Leadership Academy

*Mailing Address:* 869 Vandalia Drive

*City/State/Zip:* Cary NC 27519

*Street Address:* 869 Vandalia Drive

*Phone:* 919-480-0687

*Fax:*

*Name of registered agent and address:* Stuart Enkey  
869 Vandalia Drive,  
Cary, NC 27519

*FEDERAL TAX ID:* 82-2848844

##### **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.

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these professional licenses?</b>
MeiLani Hock	Secretary/Director	WAKE	Real Estate Investor / Business Owner	Real Estate	N
Debbie Peart	Director	WAKE	Full-time mom	none	N
Trudy Mcleod	Director	WAKE	Full-time mom	none	N
Sean Archund e	Vice Chair person/Director	WAKE	Sales Manager	Not Applicable	N
Maria Whitehead	Chair person/Director	WAKE	Full-time mom	Not Applicable	N
John Bonney	Treasurer/Director	DURHAM	Consultant	Not Applicable	N
Greg Mcleod	Director	WAKE	Senior Manager at Weatherby Healthcare	MBA	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.*

JLA is governed by the Board of Directors of Liberty Leadership Academy Inc. The board developed the mission of the organization. The mission guides everything the organization and its employees do. The board crafts or approves policies to ensure that the mission is faithfully implemented. The board is responsible for ensuring that the charter contract is fulfilled and that the school is compliant with all federal, state, and local laws and regulations.

The boards responsibility is to ensure all decisions related to personnel, instruction, and structure support the mission. The board will meet monthly, or more as needed, with the lead administrator and the Advisory Board to

monitor progress and make adjustments as needed. Additional members of the staff or community may be invited to these meetings as appropriate. For example, the Business Director may attend to discuss the finances of the school or advocates from the community may be invited to aid writing effective policies. The lead administrator and secretary of the board will create an agenda including but not limited to such topics as: budget, personnel, student achievement data, community outreach, marketing, and school goals. There will always be time at board meetings for public comment. The board knows from experience the importance of hearing feedback from the community. Their voice is both vital to, and will aid in, fulfilling our mission.

The Board of Directors are the leaders of the school. As such they are responsible for communicating our mission and vision to the community, parents, and students while representing us in the community. The board itself has sought individuals with diverse expertise and experience. The board has former educators, business leaders, a real-estate agent, MBAs, and parents with children of various ages (new born to grown). These individuals bring valuable perspectives to the mission of the school.

Each Director will take ownership of a portion of the schools governance. Initially Mrs. Whitehead will own Governance, Mrs. Peart and Mr. Bonney Education, Mr. Archunde Finance, Mr. Mcleod Operations, Mrs. Hock and Mrs. Mcleod Mission. Although one or two members may be tasked with overseeing and representing a given area, all board members are responsible for the whole of governance. This structure ensures that no area of oversight is neglected. It also certifies that as actions and policies are considered, the board will have at least one director thinking of how it will impact each part of the school.

Charter and educational experience are represented on the board and in our school leadership. Mr. Archunde is a former charter school principal and superintendent. He opened his first school (American Leadership Academy San Tan Valley Campus K-6), with an initial enrollment of over 700 students. As superintendent he grew American Leadership Academy to 8 campuses and more than 5,000 students. Mr. Archunde proved he knows how to direct marketing and community outreach to effectively fill schools. He also demonstrated educational leadership in earning his district an A rating from the state of Arizona.

All employees work for Liberty Leadership Academy Inc. with Mr. Enkey as the lead administrator. He opened a charter school in Arizona (Anthem South Campus American Leadership Academy K-6) and aided in opening five other charter schools. He brings start-up knowledge and experience along with insights as an educator and leader. Mr. Enkey deployed the educational model described in the education plan at his previous school. His first year as director 68.5% of his students scored proficient. Compared to the scores of the five area schools (Florence Leadership of Excellence 8%, Anthem K-8 34%, Magma Ranch 24%, Imagine Coolidge 21%, West Elementary 9%, Florence K-8 27%) this was a great success. Each year after that the school maintained progress in improving student proficiency. The board is confident in Mr. Enkey.

- 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 currently consists of seven directors and will remain at that number. The board seeks to be diverse to ensure that our board represents the community that we serve and invites their cooperation. The current board understands that they control the direction and destiny of the school.

Current members of the board bring experience and expertise in education, real estate, business, and finance. We have a board member and experienced in opening and managing all aspects of several charter schools. Another director on the board is a real estate agent and has aided in identifying possible school sites. Each director is a parent with a vested interest in ensuring that the children in the community are offered a school option that will help instill the principles focused on in the mission statement; namely strong academics, personal responsibility, social skills, moral focus, self-confidence, and citizenship.

Some duties of the board are to make goals, set priorities, and provide oversight while ensuring the smooth functioning of the school. To do this the board hires a lead administrator to implement the mission, goals, and priorities of the board. The board is responsible for hiring and evaluating the administrator. If needed the board is responsible for removing and replacing the lead administrator.

The board attempts to be diverse in representing the community we serve. To broaden the diversity of voices heard JLA formed an Advisory Board made up of parents and interested members of the community. The Advisory Board provides additional expertise to the board. The parents and members work as an accountant, a school psychologist, a lawyer, various educators, homemakers and an educational researcher to name a few. These individuals influenced the application but may not have had the time to commit to being board members. The Advisory Boards purpose is to counsel and provide structured and organized feedback to the board from non-employees. This is one venue parents will have to influence the board and school.

Monthly board meetings will be a consistent time to benchmark the progress of the school. Feedback to the board from staff, parents, and students will allow them to evaluate the success of the school and lead administrator. Input will be gathered in the form of surveys in addition to regular interaction. Regular reports, as stated in the bylaws, ensure the board stays informed on the academic and operational progress of the school. The SMART goals created by the board and captured in this application will be used to measure success. Monthly board meetings in which key indicators are reviewed and public comment is heard will keep the board aware of the progress of the school. Ultimately, proving proficiency and growth on the state-mandated tests will determine the academic success of the school. By working together the board will be responsive to and serve the community.

The board will work together by dividing the areas of responsibility, but ultimately share in the decision making. As stated in the previous section each director will own a portion of the oversight and will take the lead in

clearly gathering and communicating the status of their area. No director will make decisions on their own but will always communicate to the board and support the decision the board reaches. The board will also utilize the Advisory Board as appropriate as an appendage to the board to gather information, provide possible solutions, and present opportunities to improve the school or community.

The bylaws require the Board of Directors to work together. Directors will implement the Seven Habits of Highly Effective People that we teach; namely that we seek first to understand and look for win-wins. Working together leads to synergy, a state in which the product is more than the sum of its parts. The board will lead by example in showing our community how to partner together by focusing on relationships.

- 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?*

Founding board members were selected for their commitment to the mission of Jordan Lake Academy. The process started with parents talking to other parents and realizing that what they were looking for in education wasn't an option available to them.

Mr. Enkey and Mr. Archunde worked together in charter schools in Arizona. Mr. Archunde was a director of a charter school and initially hired Mr. Enkey as a teacher. Mr. Archunde became a superintendent of the charter school group and Mr. Enkey became the director of one of the schools. In time, both independently moved to NC. Mrs. Whitehead approached Mr. Archunde because of his experience in setting up and running a charter school. Mr. Archunde put Mrs. Whitehead in contact with Mr. Enkey. Finding that their vision for education aligned, they began looking for additional community members who shared their vision. Mrs. Hock and Mrs. Peart were found through public interest meetings. Mrs. Mcleod, Mr. Bonney, and Mr. McLeod were found through word of mouth. Every member brings a unique perspective and set of skills to the board.

Vacancies will arise as directors step down due to personal reasons or a desire to bring in fresh perspectives. The board will accept applications for a new board director and review them. They may ask the lead administrator or Advisory Board for input but ultimately it is the board's decision on who they will add. New board members will be added by two-thirds majority vote.

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

Per the bylaws the board will have a monthly regular meeting and special meetings as needed. The regular meetings will fall on the first Thursday from August through May. Public notices will be posted per open meetings law.

- 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.*

Board members will receive on-going training in the five areas of oversight: Mission and Values, Academics, Governance, Operations, and Finance. The

Chairman of the Board, with help from the lead administrator, is responsible for training new board members and ensuring they understand their role and responsibilities. The week before teachers report for training, the board members are required to meet each night to review the five areas of oversight and ensure that the school is delivering the mission promised to the state of North Carolina. In addition, each monthly board meeting will contain a training component prepared by the Chairman of the Board.

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 has approved a conflict of interest policy. The policy sets forth procedures for identifying and disclosing conflicts of interest. There are currently no conflicts of interest for the existing board members. Should conflicts arise, the board member will recuse himself from any board business that involves the conflict of interest.

The Board of Directors of Jordan Lake Academy is committed to being governed, operated and maintained in an open and transparent manner in accord with applicable law and regulation. The North Carolina General Assembly established charter schools in part to provide opportunities for teachers, parents, pupils, and community members to establish and maintain schools (N.C.G.S.115C-238.29A). To effectuate this purpose the General Assembly further provided that charter schools are exempt from statutes and rules applicable to a local board of education or a local school administrative unit, except as provided in the Charter School Statute and as provided in its charter and charter application (N.C.G.S. 115C-238.29E). The State Board of Education requires the adoption and implementation of a Conflict of Interest Policy.

The Board, in order to further the purpose of being governed, operated and maintained in an open and transparent manner in accord with applicable law, shall once each fiscal year require its Directors to declare in a regularly scheduled meeting of the Board, open to the general public, and during open session, what specific interest or relationships the Director may have that fall within the definition in this policy as a "conflict of interest." This declaration and any such amendments thereto, shall be recorded in the minutes of the Board of Directors and subject to inspection by the general public. In addition, each Director shall declare in open session at a regularly scheduled meeting should an additional, different or new conflict of interest arise or an existing conflict of interest change, alter or cease to exist.

A conflict of interest occurs when a Director or member of the Directors immediate family receives direct benefit from action of the Board of Directors. Immediate family is defined as a Directors spouse, child, step-child, child for which the Director provides primary care, childs spouse, grandchild, parent, sibling and parent of sibling of the Directors spouse.

A Director receives a direct benefit from the action of the Board of Directors if the Director or his/her spouse: (1) has more than a ten percent (10%) ownership or other interest in an entity that will receive a direct benefit from the action of the Board of Directors; (2) derives any income or

commission directly from action of the Board of Directors; or (3) acquires property from action of the Board of Directors.

As all teachers and teacher assistants and some other employees are contracted for employment for only one year, it is specifically permitted for a Director to participate in the discussion of and vote for the award of a contract of employment to the Director, or an immediate family member of the Director, if the Directors name, or immediate family members name, is included in a list containing at least five (5) other names who are not Directors and who are to be offered contracts for employment.

A Director shall not participate in the discussion and/or vote of a matter if the Director feels that a conflict of interest actually compromises the Directors objectivity. A Director may elect not to participate in either the discussion and/or vote of a matter if the Director feels that a conflict of interest has the appearance of substantially compromising the Directors objectivity. No Director may solicit or receive any gift, reward, or promise of reward, including a promise of future employment, in exchange for recommending, influencing, or attempting to influence the discussion or vote of the Director or action by the Board of Directors.

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

The board will utilize the following tools and processes when developing policies.

Annual Calendar

Each year the board will create a schedule for decision making. Big decisions will be planned so that appropriate committees can be formed, planning and research can occur, and impacts on the stakeholders and community can be gauged. While not every circumstance can be foreseen, many of the decisions of a board can be anticipated. When planning the calendar every effort will be made to align decision times in a logical manner so that the board can give its full attention to the matter at hand without spending time on business that should already be concluded or that doesnt need to be considered yet.

Committees

As appropriate the board will form committees to gather information, research options, study best practices, and prepare presentations to the full board. After the full board makes a decision the committees work is not done. It must then monitor the outcome of the new policy and report back its impact to the board. Committees are staffed by the boards own members, or headed by its members and staffed by Advisory Board members, school staff, or other volunteers. As appropriate the board may also appoint the lead administrator or other administrative staff as committee heads. Committees are not independent bodies and do not make decisions. Their role is to present the best information possible to the board and then support the decision the board makes.

Clear Swim Lanes

The board will also be vigilant in owning its responsibilities while not crossing into micromanagement or day-to-day decisions. While the board decides what the charter should pursue and why it is important, it is up to the administration to determine how to achieve the goals of the board. An effective board needs to think strategically, develop action plans (like an annual calendar) and have clear procedures for good order. Still, the board will be careful to not engage in creating strategies, action plans, or procedures for the administration or school to follow. Doing so takes

valuable time and energy away from topics on which the board should be engaged, such as oversight and the development of the mission, vision, goals, and policies.

When developing policies the board will meet and determine what is needed to begin the process. If needed a committee will be formed to gather the needed information. A timeline will be created to determine how soon a policy needs to be made, and when the board wants to make a decision. Once the necessary information is gathered the board will hold open discussion to weigh the various options before it. They will always keep in mind that not creating a policy is a valid option. The board will seek input from stakeholders and as best as possible attempt to foresee the consequences, good and bad, of any new policy. Once a decision is made, each director is responsible to support and sustain the decision of the board. Following any decision the board will continue to gather feedback and data on the new policy to determine if it is effective, what unforeseen effects occurred, or if adjustments are needed. This will require reflection on the boards part.

When making decisions the board will always keep the mission of the charter in mind. There are many wonderful things a school can do, but attempting to do them all will not lead to success. As Stephen R. Covey said "Its easy to say No when there is a deeper Yes burning within." If a policy, program, or opportunity doesnt support the mission of the school the board will be firm in staying focused on the deeper yes and saying no.

*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.*

Jordan Lake Academy will form a Parent Service Organization. The PSOs members will be parents or other interested individuals with the lead director serving as the head of the organization. The PSO will be an organizing body for friends of the school with their chief mission being to find ways to help parents be involved with the school. The PSO will fulfill many of the roles traditionally fulfilled by a PTA and will support teachers and the school administration. The PSO will be tasked with creating events and traditions that encourage community involvement. The PSO will always report to the lead administrator of the school.

Anyone can join the PSO at no cost. Regular meetings of the whole PSO will be held monthly on a consistent day (first Friday for example). The monthly meeting will consists of a morning session and an afternoon session. This removes barriers to participating for parents who work during the day, or dont have child care at night. The purpose of the monthly meeting is to hear progress reports on the school from the lead administrator, give feedback to the lead administrator, review upcoming events, organize committees for more detailed work, receive updates from committees, and foster a sense of community.

Committees will be formed as needed to plan and execute events, tackle specific problems, or conduct PSO business. The PSO will not operate as an independent body. Any funds raised will be set aside for the purpose for which they were raised, but will be reported, logged, housed, and dispensed by the school. When parents have an idea for the school the PSO is the place to take it to gather support, smooth out details, and ultimately implement it.

The Advisory Board supports the Board of Directors directly. The Advisory Board is made up of parents or community members whose expertise, insights, or feedback are valuable to the school. Individuals can apply to be on the Advisory Board or be invited to apply by the lead administrator or board members. The Board of Directors determines the size of the Advisory Board and who constitutes its members. The Board of Directors will make a special effort to have diverse membership on the Advisory Board that reflects the community in both demographics and socio-economic status.

The Advisory Board meets the week prior to the regular Board of Director meetings to ensure that they are prepared with any assignments from the board. They will also attend, or have representatives attend, the regular board meeting.

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

Parents and staff always have access to the school administration including the lead director. If parents feel that the administration is not properly handling their grievance they can submit a grievance in writing to the lead administrator addressed to the Board of Directors. The lead administrator will assist parents in expressing grievances that the board needs to address. Upon receiving the grievance, the board or administrator will respond within three days to set up a time to meet with the parents. All grievances will be responded to in writing. If a grievance is directed to the board but does not involve the lead administrator, it will be referred back to the administrators office to attempt to resolve it before being forwarded to the board.

If an employee has a grievance they may submit the grievance in writing to the lead administrator. If the grievance involves the lead administrator they may submit the grievance directly to the board. If a grievance is submitted to the board, but does not involve the director, it will be sent back to his or her office. In either case the administrator or board will schedule a meeting within three days to resolve the issue. All grievances will be responded to in writing. Grievances heard by the director but unresolved for the employee may be appealed to the board as required by N.C. Gen Stat. Sec. 115C-45(c). In order for the board to consider an appeal of the administrator's decision, the employee must submit materials to the board explaining the issue/cause/nature of the grievance and all steps taken to try and resolve the situation with 10 days of the administrator's response to the employee.

**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.*

Year 1 (702 students)

1 Lead Administrator

2 Assistant Administrator (Academics focused)

1 Dean of Students (Culture and Student focused)

1 Office Manager

1 Business Manager

1 Guidance Counselor

27 Regular Education Teachers

4 Specials Teachers

3 Special Education Teachers

6 Special Education Paraprofessionals

5 Regular Education Paraprofessionals

Gifted Teacher

1 Receptionist (Clerical)

2 Custodians

1 School Nurse

2 Cafeteria Workers

Other contracted services:

Substitutes

Speech Therapist

Occupational Therapist

Year 2 (792 students)

1 Lead Administrator  
2 Assistant Administrator  
1 Dean of Students  
1 Office Manager  
1 Business Manager  
2 Guidance Counselors  
34 Regular Education Teachers  
5 Specials Teachers  
4 Special Education Teachers  
7 Special Education Paraprofessionals  
6 Regular Education Paraprofessionals  
Gifted Teacher  
1 Receptionist (Clerical)  
2 Custodians  
1 School Nurse  
2 Cafeteria Workers

Year 3 (882 students)

1 Lead Administrator  
3 Assistant Administrator  
1 Dean of Students  
1 Office Manager  
1 Business Manager  
3 Guidance Counselors  
38 Regular Education Teachers  
8 Specials Teachers  
5 Special Education Teachers  
10 Special Education Paraprofessionals  
8 Regular Education Paraprofessionals  
Gifted Teacher  
1 Receptionist (Clerical)  
3 Custodians  
1 School Nurse  
4 Cafeteria Workers

Year 4 (972 students)

1 Lead Administrator  
3 Assistant Administrator  
1 Dean of Students  
1 Office Manager  
1 Business Manager  
4 Guidance Counselors  
42 Regular Education Teachers  
10 Specials Teachers  
5 Special Education Teachers  
10 Special Education Paraprofessionals  
8 Regular Education Paraprofessionals  
Gifted Teacher  
1 Receptionist (Clerical)

3 Custodians  
1 School Nurse  
4 Cafeteria Workers

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

Include the following information for the proposed charter school:

JLA knows the challenge of recruiting quality candidates. JLA will be aggressive in pursuing great candidates to ensure we are fully staffed prior to training. Our recruitment plan includes advertising with multiple platforms, in and out of state recruiting trips, and a quick decision process.

To vet potential candidate JLA will ask for references, a resume, perform a criminal background check, and where possible view a teaching sample. This enables the administration to get a feel for the style and tone of the teacher. For candidates that we know will not be a good fit we will be prompt and professional in notifying them of our decision. For quality candidates we will move quickly to secure contracts prior to other schools. Critical to teacher retention is the team. Teachers tend to stay or leave based on the peers with whom they associate. Teachers that feel they dont belong or arent supported are vastly more likely to leave. JLA will work to foster strong teams as a retention tool. JLA will also treat teachers like the professionals they are by respecting their classroom and educational expertise. Teachers that are allowed to focus on the classroom perform better than their peers. Too many teachers leave education saying they loved teaching and loved their students but werent allowed to do their jobs.

When JLA creates a culture of professionalism and teacher support other teachers will want to work for the school. Our goal is to build a reputation that keeps more applicants in our pool than positions available. Competitive above the market rate salaries will also aid in that endeavor.

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

All school employees will work for the nonprofit board. The board will directly hire and evaluate the Lead Administrator. The Lead Administrator will be responsible for hiring and staffing the rest of the school with the approval of the board.

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

A hiring process will be put in place for all staff positions. Once identified candidates will pass through a screening process. This process includes, but is not limited to, a review of the resume and application documents, contacting of applicant provided references, and interviews. The lead administrator will have final say on hiring decisions (reviewable by the board) but may delegate hiring to team leads or department heads. Every candidate will need to undergo a criminal background check and receive a "cleared" status. Should the background check reveal that the applicant has been convicted, pled guilty, or pled no contest to a felony that is listed in NCGS 115C-332(a) (1), or to a comparable federal law felony or felony from another state, the applicant

will not be offered employment. If a letter of intent to hire has been given, the offer will be withdrawn or the employee's employment will be terminated.

All employees of JLA are considered at-will and may be terminated at any time and for any reason. However, arbitrary hirings and firings are not a part of the culture as they do not show respect for others. Employees who are struggling will be presented with clear feedback and an Employee Improvement Plan. The goal of JLA is to invest in and retain employees. There will be cases for immediate dismissal (felonies, endangering children, gross misconduct), but typically an employee will know well ahead of time if dismissal is on the table and what they can do to avoid it. At board meetings the board will review employees with improvement plans. Upon termination, the employee will immediately return all school keys, equipment, phones, and any other school property.

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

Jordan Lake Academy (JLA) is dedicated to creating successful, productive, and well educated citizens. In order to achieve this goal, it is vital that all staff members share our mission. All staff members at JLA are responsible to help every child develop their leadership capacity by example and by authentic integration of leadership principles into every school activity.

The personnel tables show the staffing plan and associated budget for year one. This staffing plan is based on a student population of 702 students, consistent with the three year operational budget enrollment assumptions.

Assumptions for salary are based on current market rates in North Carolina. The salaries for teachers are slightly above the current market rate in order to assist in staff recruitment. The budget reflects a two-percent increase in salaries each year. The benefits cost listed here represents the total cost of benefits for the organization, estimated at twenty percent of employee salary. Benefits include health insurance, required contributions, and retirement contributions. Employee insurance will be covered at 80% by the organization. Optional coverage for employees will include dental, vision, and life insurance coverage at market rates.

As evident, this staffing plan accounts for all staff -including administration, instructional staff, and support staff. This staffing plan provides adequate levels of support while also avoiding unnecessary overhead. Additional staff will be added in years two and three to account for enrollment growth.

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

If an employee has a grievance they may submit the grievance in writing to the lead administrator. If the grievance involves the lead administrator they may submit the grievance directly to the board. If a grievance is submitted to the board, but does not involve the lead administrator, it will be sent back to his or her office. In either case the lead administrator will schedule a meeting within three days to resolve the issue. Grievances heard by the lead administrator, but unresolved for the employee may be appealed to the board as required by N.C. Gen Stat. Sec. 115C-45(c). In order for the board to consider an appeal of the lead administrators

decision, the employee must submit materials to the board explaining the issue/cause/nature of the grievance and all steps taken to try and resolve the situation within 10 days of the lead administrators response to the employee.

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

Though some positions carry many responsibilities each position is carefully crafted to build the schools overall success. If the school is able to qualify for Title I funds or other grant based resources then positions may be created that are funded by that grant. All other positions are funded by the state and local funds per our Average Daily Membership.

*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.*

Jordan Lake Academy will recruit and hire highly qualified personnel for students with an IEP, English Language Learners, and gifted students. JLA will ensure that the needs of these students are met. The guiding principle is always what is best for the student and what is the least restrictive environment. Teachers will receive training at the beginning of the year on how to differentiate instruction and work with our special education team. Follow up trainings will be provided throughout the year as needed.

We expect that roughly ten percent of our student population will have special needs of one kind or another. As such we have budgeted for three special education teachers and six supporting paraprofessionals. If there is a greater need than we anticipate JLA will commit the resources necessary. The lead administrator (Stuart Enkey) has experience working with ELL populations in Arizona and received a Pinal County ELL Coordinator Recognition Award for his work.

*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).*

**Lead Administrator**

The lead administrator is the chief administrator of the school and is responsible for the schools operational and financial success. The LA provides oversight of all school personnel and serves as the liaison between school operational staff and the governing board. The LA is also the contact person for parents and heads the Parent Service Organization. The LA is responsible for establishing school culture, managing community relations, administering discipline, ensuring enrollment targets are met, implementation of board policy, and serving as the face of the school.

**Assistant Administrator**

The assistant administrator of the campus oversees the academic performance of the school. The assistant administrator coaches teachers, develops intervention plans, participates in the formal and informal evaluation of instructional staff, assists in marketing efforts, oversees the school assessment plan, and ensures the academic success of the students body. The assistant administrator is responsible for ensuring that instruction is effective and implemented with fidelity. The assistant administrator collaborates with the lead administrator to develop and implement the professional development plan for the staff.

**Skills and Experience:**

Bachelors degree in education or related field

Previous teaching experience  
Leadership qualities

#### Business Manager

The business manager is responsible for keeping the schools financial records and overseeing the financial affairs of the organization. The business manager proposes a budget for board approval each year and monitors expenses against the budget throughout the school year. The business manager oversees the schools grant management activities and oversees the purchase of goods and services for the school. The business manager reports to the lead administrator.

#### Skills and Experience:

Bachelors Degree in business, finance, accounting, or other related field.

At least three years of previous experience in accounting

Proficiency with accounting software and spreadsheets

Strong communication skills

#### Office Manager

The office manager bears responsibility for the schools student information system and state reporting. The office manager also oversees the organization and retention of school records, manages the school receptionist and health aide, and oversees the ordering of office-related materials.

#### Skills and Experience:

At least three years of previous experience in office administration preferred

Strong Office and Spreadsheet skills

Proficiency with Student Information System

Excellent Customer Service

Crisis de-escalation skills

#### General Education teacher

Each teacher is responsible for the academic success of their students and delivering our mission. Teachers will daily demonstrate how leaders act, interact, and treat others.

#### Skills and Experience:

Candidates with at least a Bachelors degree having/working toward required licensure

Highly Qualified in the grade or subject they will teach

Classroom Management

Customer Service and Communication

#### Special Education teacher

The special education teacher is the case manager for their students and will need to track and document student progress. The teacher is responsible for staying compliant with all applicable laws and keeping the IEPs up to date.

#### Skills and Experience:

Candidates with at least a Bachelors degree

Special Education Experience, with required licensure in NC

Classroom Management

Customer Service and Communication Skills

Strong documentation and organization/scheduling skills

## **Staff Evaluation and Professional Development**

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

The assistant administrator, aided by the office manager, will maintain teacher licensure requirements. The assistant and lead administrators will identify areas for professional development and ensure appropriate training is provided for all staff.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission 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.*

The mission and culture of our school centers on the selection and training of our teachers. Teachers have the most direct contact with our students, parents, and community; it is essential our teachers are positive and productive people. An explanation of our mission will be given in the first few minutes of our interviews. As potential teachers are interviewed they will be asked a variety of questions. These questions will include personal pedagogy, classroom management strategies and commitment to our mission. Interviewers will be looking for passionate applicants that have a firm understanding of proven practices, leadership skills, and the desire to be apart of student success. We welcome teachers of diverse backgrounds and beliefs. As not to compromise our mission, we will select teachers not based on their personal beliefs, but their desire to execute the vision we set forth for our school. Good retention begins with good recruitment. As JLA recruits teachers and staff their commitment to our mission, pedagogy, and culture will be a non-negotiable.

Daily interaction with administrators will allow administrators to gauge teachers commitment to our mission statement. Teachers will be placed in teams and encouraged to work together. Weekly professional meetings with their teams and an administrator will encourage teachers to continue improving their craft. These meetings will center around a how did you do that approach and student outcomes Teachers will be encouraged to keep and analyze data. Data will be shared in meetings and teachers will have the opportunity to discuss the strategies used by teachers that experienced high levels of success.

Just as important as being supported by peers is being supported by your administration. In addition to daily and weekly walkthroughs/observations, administration will hold full quarterly evaluations for each teacher. Teachers will be evaluated using a modified Danielson Framework. JLA believes that teachers are the most important part of the educational system. Administration will encourage teachers to stay motivated and engaged by getting to know each teacher and making sure they feel valued and heard. Teachers will have the opportunity to feel empowered as they are encouraged to utilize their strengths, talents, and capabilities. Teacher will be recognized for their work and dedication in staff meetings and student/family engagements. Teacher will also be motivated as active participants in the school as it will be of their evaluation (Section 4, Professionalism). We understand that great curriculum, pedagogy, and culture are crucial to success, but none of them can replace the need for great

teachers. Teachers will be recognized, supported, and challenged by administration. Teachers will know that they are part of a team that wants them to succeed.

Supporting teachers means giving them real feedback on their craft and empowering them to improve. Teachers will be provided resources specific to the feedback from their evaluations.

Administrators will be expected to pair teachers with compatible strengths and weaknesses. Beginning teachers will be supported as they receive extra days of training. These trainings will be from a combination of outside sources and experienced high performing teachers on staff. New teachers will also have the opportunity to go through curriculum and receive assistance planning lessons with their mentor teachers during the year. All teachers will be encouraged to observe their peers to gather ideas and enhance their technique. Administrators will work as networkers connecting teachers. Teachers are their own best resources when encouraged to collaborate together.

As appropriate, the school will find outside trainers to bring to the school or external trainings to which we can send teachers. Our commitment is to invest in our teachers as we know they invest so much in their students. JLA sets aside \$50,000 for training.

- 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 will center around three areas: existing pedagogy and curriculum, teacher needs based on observation and teacher interest.

1. Existing pedagogy and curriculum- JLA embraces a direct/whole group instructional approach with an emphasis on classroom management as it fits our pedagogy and culture.

Teachers will also participate in training on our core curriculums: Saxon Math, Core Knowledge, and the Covey Seven Habits of Highly Effective People. JLA will pay for professional representatives to come and train in combination with members of our staff who are qualified to do so.

2. Teacher Needs- The purpose of evaluation is not to fulfill a legal requirement or check off a box, it is to identify areas of strength and opportunities to improve. Each evaluation will have a follow up where areas for improvement will be matched to resources for improvement. Part of that will be individual professional development. As school wide teacher evaluation data is aggregated we hope to notice overlaps in teacher needs. The Danielson framework is designed with four domains (Planning and Preparation, The Classroom Environment, Instruction, Professional Responsibilities) and related subcomponents. We plan to use this framework to develop our training, whether it be group or individualized in nature.

3. Teacher Interest- Teachers are constantly expanding their knowledge and improving their craft. Part of whole brain teaching is the concept of "learning in order to teach." An easy way to encourage personal improvement and development is to allow teachers to share what they are learning and train their fellow teachers.

## Components of Development

Each of the three areas addressed above will be addressed through various methods of instruction and development. Methods include the following: external and internal formal training, teacher to teacher observations, mentor relationships, informal trainings (continuous improvement), and PLCs.

- 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.*

Successful school years begin long before the students arrive. JLA provides two weeks of in depth training prior to school starting. The following is a rough schedule of what teachers will receive.

Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
New Teacher trainings

Culture  
Policies & Procedures  
Direct Instruction  
Inclusion & SPED  
Student Assessments  
Curriculum Map

Monday  
Tuesday  
Wednesday  
Thursday  
Friday  
Saxon Math & other content training  
Core Knowledge & other content training  
Evaluation Framework  
Team planning  
Leadership

Culture: Discussion of our Mission, Purpose, Values, and Goals  
Policies and Procedures: best practices, communication, legal compliance, various housekeeping items, PLCs  
Direct Instruction: our pedagogy, whole group instruction best practices  
Inclusion and Special Education: IEPs, 504s, ELLs, and compliance. Working with paraprofessionals in your classroom to provide the Least Restrictive Environment.  
Student Assessment: Training on our internal benchmarking system and data  
Curriculum Map: review of curriculum scope and sequence and alignment with state standards  
Saxon Math: Grade level specific training provided by Saxon professionals

Core Knowledge: Grade level specific training provided by Core Knowledge representatives

Evaluation Framework: Training on the evaluation method and framework administrators will be using.

Leadership: Seven Habits of Highly Effective People, Personal Mission Statements, Goals

Just as important as training that occurs before the school year is the training that occurs after it. Too often as educators we plan and implement but do not review and reflect. The week after the end of school will have activities centered around reflecting on teaching and reviewing the effectiveness of different methods. This is also opportunity for teachers as they reflect on their year to request trainings that may improve their craft for the following school year. Efforts will be made by administrators to provide training teachers seek to improve classroom management and strategies.

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.*

Teachers will be provided more than 140 hours of professional development throughout the year. In addition to the two weeks prior to school starting, 7 half days are reserved for professional development. The week after school ends professional development will be provided at the campus as well. Teachers have a 45 minute planning period each day. Once a week that time will be used to meet with their professional learning community which will include an administrator. Our staffing plans include several grade level paraprofessionals. Combined with the administrators, these paraprofessionals will provide classroom coverage so that teachers can go and observe each other teach.

Training throughout the year is crucial to correcting and improving our methods in action. However, training during the summer allows teachers more time to process the information and plan effective teaching before students arrive. Our emphasis is on training before school begins, responsive data driven training during the year, and reflective training after the year is complete.

### **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 leadership team of JLA has experience marketing and promoting charter schools with a combined twelve years experience opening six different

campuses. JLA understands the importance of engaging with the community and partnering with parents in every aspect of the school, especially enrollment. The target market is western Cary, Apex, Holly Springs, and eastern Chatham County. We intend to be a community school, but also anticipate enrollment from outside the immediate target market. All marketing activities will be tied to specific calls to actions carefully crafted to create leads, turn leads into prospects, and finally convert prospects into applicants.

Research indicates the combination of print and digital media yields better results than either method in isolation. Additionally, reliance on purely digital marketing platforms could inadvertently prohibit lower socioeconomic populations or those without internet access from learning about the school. JLA's print marketing include mailers/postcards and site signage. JLA has a Facebook page currently available. Upon approval we will purchase a unique web domain. JLA will use paid Facebook advertisements with a budget of \$6,000.

Mailers will be distributed within a 5 mile radius of the school inviting households to in-person events or to visit the website. The target priority will be homes with students age four through twelve. Postcards will be distributed in January, March, and May of 2020. The cost per mailer is estimated at \$1.08. JLA anticipates sending approximately 2000 postcards per campaign for a total cost of \$6,480 for three campaigns.

We will design and purchase banners and site signs to place on campus. Signs are designed to drive prospective supporters to the website. Banners promoting specific events will also be made. It is estimated that the school will spend \$2000 in banner and site signs, beginning in January 2020. In addition to mailers and banners we will distribute the print ads at local preschools, daycares, grocery stores, activity centers (dance studios, soccer and baseball fields, etc.). We will target events/places where families with children frequent.

Parent information nights will be held regularly at local parents homes, starting in the fall of 2019. These small group meetings will permit potential supporters to interact with school administration in a comfortable setting. Once the new school facilities are complete, we will invite parents. It will be an opportunity to meet the administration and teachers, to see the curriculum, and visualize their child there. The facilities will boost the excitement and raise the word-of-mouth advertising.

To provide analytics to measure the success of our marketing efforts, JLA will utilize Google Analytics, Facebook Analytics, landing pages linked to analytics, and enrollment software. In order to measure the success of digital campaigns, we measure the impact of every action taken. For example, each time a Facebook Ad is purchased, JLA will utilize A/B testing to determine which Ad or market segment strategy receives the most impressions. Once determined, the more effective strategy will be utilized. Ads that generate more clicks will be emphasized. Additional measures of activity include website traffic, bounce rate, social media traffic and engagement, and shares and/or likes.

The most important measure of marketing success is the number of

applications received. Applications will be tallied as soon as they are submitted. These numbers will be checked daily to ensure that enrollment targets can be met. We budget \$30,000 for start up marketing expenses, a figure that clearly represents the schools understanding of and commitment to a robust marketing effort.

## **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.*

Partnering with parents will be an important part of successfully fulfilling our mission statement. Communication during our planning year will rely on various means, including our website, facebook page, fliers, and word of mouth. JLA will hold several information nights for parents to learn about the school and the admission procedures. Attendance is not required, but hopefully parents will be excited about our vision and spread that excitement to their neighbors.

Jordan Lake Academy will hold family fun nights in the months prior to school opening. Families that have already enrolled will be invited in order to build relationships within our school community. Any member of the community will also be invited to simply join in the fun, or to learn more about our school.

Often parents want to be involved in their school, but dont know what they can do to help. Jordan Lake Academy will form a Parent Service Organization. The PSO will be made up of parents with the lead administrator serving as the head of the organization. The PSO will be an organizing body for parents with their chief mission being to find ways to help parents be involved with the school. The PSO will be tasked with creating events and traditions that encourage community involvement. These events may include a fall festival, mother-son and daddy-daughter dance, holiday social, spring carnival, and summer events. The PSO will also be tasked for fund raising for specific school needs. Meeting twice a month with the lead administrator, parents and PSO participants will develop a relationship of trust with school personnel.

As time goes on, and given the smaller size of our school, parents and staff will develop lasting relationships. Administration will make an effort to know every child by name and keep an open door policy. Administrators will be highly visible and accessible on the campus.

The school will sponsor back to school nights, curriculum nights, and parent teacher conferences. Combined with weekly newsletters and an active social media presence, parents will be well informed of the activities of the school and feel welcome and wanted there.

In order for JLA to accomplish the goals stated in its mission statement, successful partnering with parents is essential to its success. Parental involvement is a key indicator of student success and JLA will make every effort to invite parents to be partners in their childs education.

## **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.*

Jordan Lake Academy will enroll any eligible student without discrimination in accordance to G.S. 115C-238.29F (g)(5).

The open enrollment period for the 2020-2021 school year will run for no less than 30 days beginning around Jan. 15, 2020. As JLA accepts completed applications during the open enrollment period, they will be date stamped and numbered according to order received for the grade received.

At the end of open enrollment, if any grade has received more applications than spots are available, a public lottery will be used to determine acceptance. If fewer applications are received than spots are available for a particular grade, all applications will be accepted.

Once open enrollment ends, applicants will be placed on a waitlist in the order that their application was received.

2. **Lottery:** In the event that the number of applications exceeds the number of available spots for a particular grade, a public lottery will be conducted. The lottery will be conducted two weeks after the open enrollment period closes. Applicants selected to receive open slots will receive an offer of admission. Applicants will have ten days to respond. If the applicant declines enrollment or fails to respond within the given time frame, the open spot will be offered to the next applicant on the waitlist.

3. **Waitlist:** If needed, JLA will populate its waitlist using the outcome of the open enrollment period/lottery. Students will remain on the waitlist (year after year) until they are enrolled or ask to be removed from the waitlist.

**Re-enrollment:** Re-enrollment will be a simple process conducted in the spring of each year. Parents will be sent a form to confirm they are returning the next year. Per NC law students do not have to re-enroll to maintain their seat, this is data the Board and Lead Administrator will use to plan for the following year.

**Withdrawal and transfer:** To request a transfer or withdrawal, parents will need to complete a withdrawal/transfer form that needs to be submitted to

the office manager. The Lead Administrator and teachers will be notified. Textbooks will need to be returned and fines/fees paid in full. Records will be forwarded to new school as soon as request is received.

Parents may withdrawal or transfer at any time. The Lead Administrator will follow up with the family as appropriate to ensure that any valuable feedback is obtained and considered for improvements.

4. Pre-admission activities- there are no pre-admission activities planned.

### **Weighted Lottery**

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

Yes:

No:

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, 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 Wake County Schools
- LEA #2 Chatham County Schools
- LEA #3 Durham Public 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 920	LEA 190	LEA 320	LEA 920	LEA 190	LEA 320	LEA 920	LEA 190	LEA 320	LEA 920	LEA 190	LEA 320	LEA 920	LEA 190	LEA 320
Kindergarten	59	6	1	59	6	1	59	6	1	59	6	1	59	6	1
Grade 01	59	6	1	59	6	1	59	6	1	59	6	1	59	6	1
Grade 02	67	7	1	67	7	1	67	7	1	67	7	1	67	7	1
Grade 03	67	7	1	67	7	1	67	7	1	67	7	1	67	7	1
Grade 04	75	8	1	75	8	1	75	8	1	75	8	1	75	8	1
Grade 05	75	8	1	75	8	1	75	8	1	75	8	1	75	8	1
Grade 06	75	8	1	75	8	1	75	8	1	75	8	1	75	8	1
Grade 07	75	8	1	75	8	1	75	8	1	75	8	1	75	8	1
Grade 08	75	8	1	75	8	1	75	8	1	75	8	1	75	8	1
Grade 09	0	0	0	80	9	1	80	9	1	80	9	1	80	9	1
Grade 10	0	0	0	0	0	0	80	9	1	80	9	1	80	9	1
Grade 11	0	0	0	0	0	0	0	0	0	80	9	1	80	9	1
Grade 12	0	0	0	0	0	0	0	0	0	0	0	0	80	9	1
	627	66	9	707	75	10	787	84	11	867	93	12	947	102	13
	702			792			882			972			1062		

Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
501 (c) (3) still needs to be obtained.	Deborah Brown	Tax-Exempt S
Projected enrollment seems unrealistic.	Shannon Sellers	Certify Gove
<p>3/7 of your board is listed as "Full time Mom." What expertise or perspective do they bring to the Board, and what value is there is to having 3 people from that background?</p> <p>What is the rationale behind having Peart and Bonney take the lead on education, if that is not their background?</p> <p>Two of your board members work at the same location. Would your board be stronger with more diversified experience?</p> <p>Are Trudy and Greg McCloud related, and if so, does that form a potential conflict?</p> <p>What would be the removal process for a board member?</p> <p>How will your board represent a diverse student population when so many attended the same university and live in the same street/neighborhood?</p> <p>Do all of your board members agree on what is a "moral" and "wholesome" education, and how will you work with families who might have different interpretations of those terms?</p> <p>How will board members be evaluated?</p>	Deborah Brown	Governance a
<p>Please explain further why a term of seven years was selected for a director? How will that requirement factor into the recruitment of directors?</p> <p>The by-laws do not specify the number of board members that the organization shall have.</p>	Jennifer Gnann	Governance a
I'm concerned about the lack of education experience on the board.	Steven Walker	Governance a
<p>What other relationships does the board have American Leadership Academy besides the directors mentioned?</p> <p>How will the board evaluate itself and the administrator?</p>	Shannon Sellers	Governance a
<p>How will board evaluate itself? How will board know if students are meeting the stated mission of the school, especially related to traits such as citizenship, morality, personal responsibility, etc.?</p> <p>Bylaws should include the min and max number of board members.</p> <p>Is board confident that the directors have varied enough expertise to successfully govern?</p>	Danielle Allen	Governance a
<p>Besides the proposed school leaders connection to American Leadership Academy what other connection does the proposed school have to either ALA or Charter One or Schoolhouse Development LLC or Schooldev East? Why did Liberty Leadership Academy come together as a group? How was Covey integrated into the other schools Mr Enkey w as affiliated with? How did the Board first meet Mr Enkey? Where is Mr Enkey currently employed and where does he live now? Please describe (dates, locations, attendees, agendas, feedback)the public interest meetings the team held.</p>	Tracy Kelley	Governance a
Acceptable	Heather Soja	Governance a
N/A, no EMO/Cmo	Deborah Brown	Proposed Man
<p>How will you "be aggressive in pursuing great candidates"? What does that look like?</p> <p>How will you attract so many special programs candidates when they are in high demand?</p> <p>What do "market competitive" salaries look like?</p> <p>In attracting "high quality" candidates, will you offer extra pay for advanced degrees, NBCTEs, and/or high demand fields?</p> <p>Much research says teacher retention is based more on administration, not peers. What will you do to ensure solid staff-admin relationships and vision?</p> <p>How will you "respecting their classroom and educational expertise" when you are proposing a packaged and recitative curriculum?</p>	Deborah Brown	Staffing Pla

The notion that employees can be fired at will, but that they won't because it won't be "part of the culture" does not seem logical or designed to reassure potential candidates?		
If the administrator and so many of board members are all connected through the same university, how will an employee be assured of a fair hearing if they have a grievance with the administrator?		
Acceptable	Heather Soja	Staffing Pla
The Grievance policy is vague with no time frame. Will the board not vote on hiring teachers? The application makes it sound like the administrator will hire and then the board may review.	Shannon Sellers	Staffing Pla
I am not sure that there is enough time set aside for teachers to learn how to implement core knowledge and Saxon math given the other things being focused on but it is not clear in the plan.	Heather Soja	Staff Evalua
What will "Daily interaction with administrators" look like, and will admin be able to commit to that? Same to weekly walk throughs and observations, and quarterly evaluations-- how will you maintain that ambitious a schedule and still be able to handle other administrative duties?  What kind of a cycle of support will you have for BT teachers? How will mentor teachers be selected, trained, and evaluated? How will you document your support for BTs? How was the \$50,000 for "training" sum arrived at? What kind of training will you be paying for? Is that a yearly amount, a start up amount? or something else? Who will provide the training in the opening weeks? How will you select and personalize and/or differentiate PD ongoing? Will you pay teachers for professional development in the summer? Who will lead/plan PD throughout the year? Is 45 min a day of planning enough for teachers to be able to plan lessons, respond to student work, and observe each other?	Deborah Brown	Staff Evalua
Will beginning teachers be assigned a mentor? How often will they meet?	Shannon Sellers	Staff Evalua
Dates listed here are not in alignment with an Accelerated application	Jennifer Gnann	Marketing Pl
Why does your target market not include Durham, when your proposed site is as close to that market as to, for example, Holly Springs? Wouldn't recruiting from Durham County help to achieve a more diverse student population? Will you recruit from areas that are not as white and not as prosperous economically than the areas you are proposing for a target? Will you provide application and marketing materials in any language other than English?	Deborah Brown	Marketing Pl
How can the PSO be an effective independent organization if admin is its head? How will you communicate with families who may not have internet access? How will you involve parents who may have childcare issues or a work schedule that is not traditional-- who may not be able to attend evening meetings or "family fun nights?"	Deborah Brown	Parent and C
702 students in the first year seems unrealistic.	Shannon Sellers	Projected St
I am not convinced that it is realistic. It is a lot to tackle in the first year. What is the plan for athletics?	Heather Soja	Projected St
Enrollment projections are very ambitious.	Danielle Allen	Projected St
Not a realistic projected enrollment growth chart. K-8 is a large number to start with.	Tracy Kelley	Projected St
You list an expected enrollment of 320 from Durham Public schools, yet none of your marketing was targeted at Durham County?	Deborah Brown	Projected St
Will you allow for siblings automatic admissions and preferential admission for families with a child already enrolled? Will employees' children be offered preferred admission?	Deborah Brown	Weighted Lot

Reviewer	Score
Deborah Brown	
Alex Quigley	
Alan Hawkes	

Cheryl Turner	
Danielle Allen	Pass
Deborah Brown	Fail
Steven Walker	Fail
Ginger Cash	
Heather Soja	Pass
Jennifer Gnann	Pass
Joe Maimone	
Tracy Kelley	Fail
Lynn Kroeger	
Shannon Sellers	
Shannon Sellers	Pass
Stephenie Clark	

## 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.*

Jordan Lake Academy is committed to ensuring that transportation needs will not be a barrier to any child attending the school. As such we will ensure the transportation options we provide will meet the needs of the families we serve. We view how our students arrive at school as another way we can invite and foster partnership with our community and parents. We will offer bussing while also encouraging parents to carpool where possible. We will provide transportation as required by any Individualized Education Plans or other applicable laws.

JLA will purchase 2 busses to start and increase as needed. Using a transportation survey, we will verify how many students will require bussing, and where they are located. If the survey makes evident that 2 busses are not sufficient to fulfill the need, we will make additional bus purchases. Depots will be planned near these students to ensure that all have access to free and reliable transportation to school.

JLA will encourage parents to carpool and will refer them to free apps such as Cozi or Carpool School Edition. When parents provide transportation staff can focus on greeting arriving students, getting to know parents, and responding to their needs. It creates a daily contact point between staff members and parents, and invites parents to be part of the school every day. It also eliminates the distractions and anxiety that riding the bus can bring to students. The bus is the one place where the adult is paid to look the other way (at the road).

We hope to be located in Chatham county near Apex and Cary neighborhoods. This location will facilitate ride sharing and walking by students. Staff will support walkers/bike riders by acting as road crossing guards in cooperation with local law enforcement. This is another opportunity for partnership with local authorities.

Targeted Population: We intend to serve the families of East Chatham county, Apex, and Cary, NC near our school. Between bussing, carpooling, and walking we believe transportation will not be an issue for any potential students.

The budget has built in \$55,000 to cover the cost of transportation needs which also may include transport of students experiencing homelessness or exceptional children with transportation needs documented in their IEPs. We will commit additional funding to this portion of our budget from the excess funds as needed. Lack of transportation will not prevent any child from enrolling or attending Jordan Lake Academy.

### **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.*

Jordan Lake Academy will have a kitchen and kitchen manager who will prepare a hot lunch each day. JLA will not participate in the National School Lunch Program (NSLP) but will provide healthy and nutritionally balanced meals for our students. Free and Reduced lunch eligibility forms will be collected for Title I data and to identify students who will require aide. Students may also be identified by family request. The kitchen's goals are to support the school mission of supporting students, ensuring every child is fed, while staying as budget neutral or positive as possible. The kitchen is not a for-profit operation. However, if there are earned funds after costs are accounted for, they will be used for students in need and kitchen upkeep.

Students who qualify in the NSLP will receive the same benefit from JLA. We will foster community ties to meet these needs, offering local charities and churches the opportunity to sponsor anonymous children at the school (including supplies or clothes). If those needs cannot be met through partnership, JLA will always ensure our students have what they need.

Students will never go without a meal. Part of the morning procedure is ascertaining if students brought lunch or will be buying lunch that day. Monies are always sent to the office/kitchen in the morning to be added to accounts and students will not pay during lunch. This gives the kitchen manager an accurate count of the number of lunches that need to be prepared so food doesn't go to waste. It is also our first chance to identify students who did not plan for lunch that day.

In the cafeteria, lunch aides assigned to each class will be trained to verify that every student has a lunch. Any students without lunch will be provided a meal by the kitchen manager. The kitchen manager is responsible for daily tallies of negative balances and students who did not bring lunch. They will promptly notify parents of deficiencies and partner with them if there is a need.

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

The Nonprofit Board 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	\$1,000,000	\$2,921.00

Officers and Directors/Errors and Omissions		\$1,000,000	\$4,888.00
Property Insurance		\$5,000,000	\$5,900.00
Motor Vehicle Liability		\$1,000,000	\$1,150.00
Bonding Minimum/Maximum Amount	\$1,000,000	\$3,000,000	\$2,921.00
Other		\$1,000,000	\$2,387.00
Total Cost			\$20,167.00

\*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.

Ila 10/01/2018

(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.*

After vetting several potential partners, Jordan Lake Academy chose to partner with Education Capital Solutions to obtain capital and oversee planning, permitting, and construction of a school facility. Educational Capital Solutions has more than six billion in investments with just a portion dedicated to financing schools. Educational Capital Solutions is expert in ensuring big projects are developed and completed on time, and meet the unique needs of their client schools. They currently lease 65+ facilities to charter schools as well as more than 80 early childhood education centers and private schools. We are confident in the partner we have chosen.

The advantage of partnering with ECS is that it provides JLA with a stable and ready-on-day-one environment that helps students and parents feel comfortable. Environment matters for education and we believe having a new facility that matches our acceptance criteria will maximize productivity and reduce unwanted distractions and difficulties. JLA does not currently have

the capital to buy land or build a building. This partnership will be fruitful for both parties as the investors will get a regular and dependable tenant and JLA will get a new facility in which to operate.

JLA will ensure our contract with the builders places full responsibility on them to be in compliance with all laws pertaining to school facilities. Our partners in this endeavor have agreed to help us in ensuring that our school will be built on time and receive the needed Educational Certificate of Occupancy. This is an acceptable agreement as the only way they can hope to receive a return on their investment is if JLA receives all the needed clearances to open on time and without delays. The lead administrator will act as a liaison with ECS and make regular reports to the board on the progress of the facility.

JLA is not putting all of its eggs in one basket. Big projects are subject to outside circumstances, such as abundant extreme weather, that can prevent their timely completion. We have identified a suitable site on which to lease space and place trailers. 3300 Green Level West Rd currently has office space for rent with 10 acres adjacent perfect for placing modular classrooms or trailers. Our first year budget sets aside \$960,000 dollars for a lease which should more than cover our use of the property should circumstances prevent completion of the facility.

*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.*

A facility of 55,000 square feet which leases for \$960,000 a year would put the cost at around \$15 per square foot. This is cheaper than a recent Wake county charter proposed but still reasonable for the market.

**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 leaders of JLA have opened a combined seven charter schools. They know the difficulty of completing new buildings on time and within the budget. JLA is clearly stating as part of our acceptance criteria that the building be completed well before school begins. The lead administrator will be tasked with tracking the progress of the contractors in completing the building. Should we feel that the building will not be completed on time we will begin implementing our contingency plan.

JLA will identify possible back up sites for use. One such site is a church in our target area with offices for rent and adjacent land we could lease and on which we could place modular buildings for classrooms. Other sites will be compiled in case the need arises. Although the need for this contingency would not be a welcome development for the school, we would view it as an opportunity to deepen our partnership with the community. Our biggest need would be classroom spaces. The only program we foresee not being able to fulfill as stated in the charter would be the kitchen program. We would work with our community to fulfill our commitment that no child goes hungry in our school.



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<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
I do have some facility concerns and need to discuss the contingency plan in more detail. It has been very hard to build a charter in Wake County recently.	Steven Walker	Certify Oper
Which county does the school plan to locate? The beginning of the application states Wake but in this section it states it will be located in Chatham County.	Shannon Sellers	Certify Oper
Are Mr Archunde and Mr Enkey in any way still affiliated with American Leadership Academy, Glenn Way, Brand brothers, Charter One in Arizona?	Tracy Kelley	Certify Oper
If you need to purchase additional busses and hire drivers, how will you accommodate those expenses? How will your location facilitate walking, when the areas you mention often do not have sidewalks or safe walking pathways and pedestrian crosswalks?	Deborah Brown	Transportati
The application says that it plans to locate in Wake County and not Chatham as indicated in this part of the application.	Heather Soja	Transportati
The application is for a Wake County Charter School, but here you say the school will be in Chatham County, why the discrepancy?	Shannon Sellers	Transportati
Will two buses be enough to transport any students who require it?	Danielle Allen	Transportati
Please clarify where the school will be located- Chatham or Wake County?		
The plan is to purchase 2 busses year 1 but the budget shows just 20k for year 1, why is that? Does the team intend to buy new or used school busses?	Tracy Kelley	Transportati
Is there any plan for providing breakfast if it turns out that your students are arriving at school from homes where food security is an issue?	Deborah Brown	School Lunch
Quote does not match insurance line item in budget.	Danielle Allen	Civil Liabil
What is Mr Enkey's relationship with Education Capital Solutions? Are there any third party transactions that need to be disclosed? Is there a connection between ECS and American Leadership Academy, Schoolhouse Development LLC, Schooldev East, or the Brand brothers, or Glenn Way?	Tracy Kelley	Facility and
A facility in the first year requiring a specific number of students to cover the cost can be daunting.	Heather Soja	Facility and
What other partners have you made arrangements with? WERE funds spent or given by Education Capital Solutions that should be disclosed? Which county is the facility located since there is a discrepancy of county in this section?	Shannon Sellers	Facility and
How will you ensure diverse families feel welcome if your contingency plan of needing a church for a school site needs to be implemented? What evidence can you offer other than "we have experience" to ensure that your facility is appropriate and adequate?	Deborah Brown	Facility and
The applicant should clarify when they intend to open. Building a school will take longer than the 10 months an accelerated year gives them. Will year one definitely be housed in trailers while the school is built? Or is this a contingency plan?	Jennifer Gnann	Facility and

<b>Reviewer</b>	<b>Score</b>
Steven Walker	Pass
Stephenie Clark	
Danielle Allen	Pass
Cheryl Turner	
Alan Hawkes	
Alex Quigley	
Deborah Brown	
Ginger Cash	
Heather Soja	Pass
Jennifer Gnann	Pass
Joe Maimone	
Tracy Kelley	Pass
Lynn Kroeger	

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Shannon Sellers	
Shannon Sellers	Pass
Deborah Brown	Fail

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## VI. FINANCIAL PLAN

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

### Budget: Revenue Projections from each Year 1

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

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

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

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

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

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

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

#### LEA #1 920 - Wake County Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$5,233.73	627	\$3,281,548.71
Local Funds	\$2,420.00	627	\$1,517,340.00
Federal EC Funds	\$4,464.16	68	\$303,562.88
<b>Totals</b>			\$5,102,451.59

#### LEA #2 190 - Chatham County Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$5,464.71	66	\$360,670.86
Local Funds	\$3,843.81	66	\$253,691.46
Federal EC Funds	\$4,464.16	1	\$4,464.16
<b>Totals</b>			\$618,826.48

#### LEA #3 320 - Durham Public Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$5,506.61	9	\$49,559.49
Local Funds	\$3,221.02	9	\$28,989.18
Federal EC Funds	\$4,338.44	1	\$4,338.44
<b>Totals</b>			\$82,887.11

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**Total Budget: Revenue Projections Year 1 through Year 5**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>-State ADM Funds</b>	\$3,691,779	\$4,162,815	\$4,633,850	\$5,104,886	\$5,575,922
<b>-Local Per Pupil Funds</b>	\$1,800,021	\$2,012,981	\$2,235,621	\$2,453,421	\$2,671,221
<b>-Exceptional Children Federal Funds</b>	\$312,365	\$343,615	\$374,864	\$406,113	\$437,362
<b>-Other Funds*</b>	\$0	\$0	\$0	\$0	\$0
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$5,804,165	\$6,519,411	\$7,244,335	\$7,964,420	\$8,684,505

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

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

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**Personnel Budget: Expenditure Projections 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		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary									
Administrative & Support Personnel:															
Lead Administrator	1	\$105,000	\$105,000	1	\$105,000	\$105,000	1	\$105,000	\$105,000	1	\$105,000	\$105,000	1	\$105,000	\$105,000
Assistant Administrator	2	\$80,000	\$160,000	2	\$80,000	\$160,000	3	\$80,000	\$240,000	3	\$80,000	\$240,000	3	\$80,000	\$240,000
Finance Officer	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$5,000	\$5,000	1	\$50,000	\$50,000
Clerical	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000	1	\$25,000	\$25,000
Food Service Staff	2	\$20,000	\$40,000	2	\$20,000	\$40,000	4	\$20,000	\$80,000	4	\$20,000	\$80,000	4	\$20,000	\$80,000
Custodians	2	\$30,000	\$60,000	2	\$30,000	\$60,000	3	\$30,000	\$90,000	3	\$30,000	\$90,000	3	\$30,000	\$90,000
Transportation Staff	2	\$20,000	\$40,000	2	\$20,000	\$40,000	2	\$20,000	\$40,000	2	\$20,000	\$40,000	2	\$20,000	\$40,000
Dean Of Students	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000	1	\$50,000	\$50,000
School Counselor	1	\$50,000	\$50,000	2	\$50,000	\$100,000	3	\$50,000	\$150,000	3	\$50,000	\$150,000	3	\$50,000	\$150,000
A - Total Admin and Support:	13		\$580,000	14		\$630,000	19		\$830,000	19		\$785,000	19		\$830,000
Instructional Personnel:															
Core Content Teacher(s)	27	\$42,000	\$1,134,000	34	\$45,000	\$1,530,000	38	\$48,000	\$1,824,000	42	\$50,000	\$2,100,000	46	\$52,000	\$2,392,000
Electives/Specialty Teacher(s)	4	\$35,000	\$140,000	5	\$35,700	\$178,500	8	\$35,700	\$285,600	10	\$36,400	\$364,000	10	\$37,100	\$371,000
Exceptional Children Teacher(s)	3	\$50,000	\$150,000	4	\$51,000	\$204,000	5	\$52,000	\$260,000	5	\$53,000	\$265,000	5	\$54,000	\$270,000

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Instructional Support	6	\$20,000	\$120,000	7	\$20,400	\$142,800	10	\$20,800	\$208,000	10	\$21,200	\$212,000	10	\$21,600	\$216,000
Teacher Assistants	5	\$20,000	\$100,000	6	\$20,400	\$122,400	8	\$20,800	\$166,400	8	\$21,200	\$169,600	8	\$21,600	\$172,800
B - Total Instructional Personnel:	45		\$1,644,000	56		\$2,177,700	69		\$2,744,000	75		\$3,110,600	79		\$3,421,800
A+B = C - Total Admin, Support and Instructional Personnel:	58		\$2,224,000	70		\$2,807,700	88		\$3,574,000	94		\$3,895,600	98		\$4,251,800
Administrative & Support Benefits															
Health Insurance	7	\$700	\$4,900	7	\$700	\$4,900	7	\$720	\$5,040	7	\$750	\$5,250	7	\$750	\$5,250
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	7	\$4,000	\$28,000	7	\$4,000	\$28,000	7	\$4,000	\$28,000	7	\$4,000	\$28,000	7	\$4,000	\$28,000
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	13	\$3,100	\$40,300	14	\$3,162	\$44,268	19	\$3,225	\$61,275	19	\$3,289	\$62,491	19	\$3,355	\$63,745
Social Security	13	\$870	\$11,310	14	\$888	\$12,432	19	\$905	\$17,195	19	\$923	\$17,537	19	\$942	\$17,898
D - Total Admin and Support Benefits:			\$84,510			\$89,600			\$111,510			\$113,278			\$114,893
Instructional Personnel Benefits:															
Health Insurance	34	\$700	\$23,800	41	\$700	\$28,700	46	\$720	\$33,120	51	\$750	\$38,250	55	\$750	\$41,250
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	34	\$4,000	\$136,000	41	\$4,000	\$164,000	46	\$4,000	\$184,000	51	\$4,000	\$204,000	55	\$4,000	\$220,000
Social Security	45	\$870	\$39,150	56	\$888	\$49,728	69	\$905	\$62,445	75	\$923	\$69,225	79	\$942	\$74,418
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	45	\$3,100	\$139,500	56	\$3,162	\$177,072	69	\$3,225	\$222,525	75	\$3,289	\$246,675	79	\$3,355	\$265,045
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional Personnel Benefits:			\$338,450			\$419,500			\$502,090			\$558,150			\$600,713

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D+E = F - Total Personnel Benefits			\$422,960			\$509,100			\$613,600			\$671,428			\$715,606
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	13		\$664,510	14		\$719,600	19		\$941,510	19		\$898,278	19		\$944,893
B+E = H - Total Instructional Personnel (Salary & Benefits)	45		\$1,982,450	56		\$2,597,200	69		\$3,246,090	75		\$3,668,750	79		\$4,022,513
G+H = J - TOTAL PERSONNEL	58		\$2,646,960	70		\$3,316,800	88		\$4,187,600	94		\$4,567,028	98		\$4,967,406

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**Operations Budget: Expenditure Projections**  
**Year 1 through Year 5**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
	Administrative & Support:					
Office:	Office Supplies	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Paper	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Computers & Software	\$125,000	\$6	\$6	\$6	\$6
	Communications & Telephone	\$15,500	\$15,500	\$15,500	\$15,500	\$15,500
	Copier leases	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
	Student Accounting	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
	Financial	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Other Professional	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
Facilities	Facility Lease/Mortgage	\$960,000	\$960,000	\$960,000	\$960,000	\$960,000
	Maintenance	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000
	Custodial Supplies	\$0	\$0	\$0	\$0	\$0
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$31,647	\$31,900	\$32,300	\$33,100	\$34,000
	Other	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
Utilities	Electric	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000
	Gas	\$6,500	\$6,500	\$6,500	\$6,500	\$6,500
	Water/Sewer	\$11,000	\$12,000	\$15,000	\$15,000	\$15,000
	Trash	\$7,000	\$7,000	\$7,000	\$7,000	\$7,000
Transportation	Buses	\$20,000	\$5,000	\$5,000	\$5,000	\$5,000
	Gas	\$14,000	\$14,000	\$14,000	\$14,000	\$14,000
	Oil/Tires & Maintenance	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000
Other	Marketing	\$30,000	\$6,000	\$6,000	\$6,000	\$6,000
	Child nutrition	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
	Travel	\$12,000	\$12,000	\$12,000	\$12,000	\$12,000
	Other	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	K - TOTAL Administrative & Support Operations	\$1,469,647	\$1,306,906	\$1,310,306	\$1,311,106	\$1,312,006
	Instructional:					
Classroom Technology	Computers	\$50,000	\$5,000	\$5,000	\$5,000	\$5,000

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	Software	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Instructional Technology	\$7,020	\$7,920	\$8,820	\$9,720	\$10,620
	Other	\$50,000	\$5,000	\$5,000	\$5,000	\$5,000
Instructional Contract	Instructional Support	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Staff Development	\$50,000	\$50,000	\$60,000	\$65,000	\$70,000
Books and Supplies	Instructional Materials	\$12,500	\$15,600	\$18,000	\$21,000	\$24,000
	Curriculum/Texts	\$242,000	\$96,000	\$82,000	\$80,000	\$100,000
	Copy Paper	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Testing Supplies	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Other	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Instructional Contract	Exceptional Children Services	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Other	Iep/504 Support Expenses	\$22,000	\$22,000	\$22,000	\$22,000	\$22,000
	L - TOTAL Instructional Operations	\$583,520	\$351,520	\$350,820	\$357,720	\$386,620
	K+L = M - TOTAL OPERATIONS	\$2,053,167	\$1,658,426	\$1,661,126	\$1,668,826	\$1,698,626

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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
J - TOTAL PERSONNEL	\$2,646,960	\$3,316,800	\$4,187,600	\$4,567,028	\$4,967,406
M - TOTAL OPERATIONS	\$2,053,167	\$1,658,426	\$1,661,126	\$1,668,826	\$1,698,626
J+ M =N TOTAL EXPENDITURES	\$4,700,127	\$4,975,226	\$5,848,726	\$6,235,854	\$6,666,032
Z - TOTAL REVENUE	\$5,804,165	\$6,519,411	\$7,244,335	\$7,964,420	\$8,684,505
Z - N = SURPLUS / (DEFICIT)	\$1,104,038	\$1,544,185	\$1,395,609	\$1,728,566	\$2,018,473

**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.*

Jordan Lake Academy began with our mission and then sought an enrollment plan to match it. It is critical to our mission that we partner with families to create an environment to encourage strong academics, personal responsibility, citizenship, moral focus, and social skills. We want a community-school-feel where students, parents, and staff know each other. Community feedback from surveys, interest meetings, and discussions with community members reflects a desire for smaller schools. A lot of attention is paid to the size of classrooms but not the size of the schools housing those classrooms. We believe both are important. Experience of members of the board and the lead administrator show that our targets are conducive to meeting our mission.

JLAs will serve 702 students in grades kindergarten through eighth its first year and add a grade level each year until serving 1062 students in grades K-12 by its fifth year. JLA is targeting a quickly expanding area of western Cary and eastern Chatham county. Community feedback reflects that parents who have moved onto the more affordable Chatham county side of neighborhoods are concerned at the distance of Chatham county schools. Neighborhoods are expanding into Chatham county resulting in more and more parents desiring a closer option. Many Cary residents express frustration that the schools closest to their homes are already full and their students are being sent elsewhere. This is an area where population growth is continuous, meaning JLA needs a smaller and smaller market share to be successful. Other charters in the area have consistently exceeded their enrollment targets. Community feedback reflects that the future high school component will be a draw for many parents who wish to secure a spot for their child in an independent high school.

JLA has a board member and lead administrator who have both opened schools that exceeded the targeted enrollment for this school. Mr. Archunde opened the San Tan Valley campus of American Leadership Academy in Arizona which was a K-6 with an initial enrollment of over 750 students. Working with Mr. Enkey, he opened the Ironbridge campus with an enrollment of over 800 students. Again, the focus for JLA is not in getting a large number of

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students, but the right number of students to fulfill our mission.

After careful consideration we believe our break-even to be 420 students. At that number we could adjust our expenditures and needs to still fulfill our mission and be fiscally solvent.

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

The leadership of JLA has experience dealing with revenue gaps. Should that occur JLA would explore every possible scenario so that we could continue to fulfill our mission of creating successful citizens. Options could include private fund raising, additional loans, or alternative revenue sources. Alternative revenue could be found by sub leasing building space or other school assets such as busses or technology equipment.

JLA would also review our budget to align our expenditures with the expected revenue. Fewer students would mean fewer needed staff, curriculum, consumables, technology fees, and other aggregate costs. Every opportunity to save money would be explored including a reduction in pay for administrators and renegotiating lease and loan payments. JLA would also explore securing asset donations from alternative sources.

*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*

The budget does not account on other funds for operation.

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

20 to 1

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

JLA will constantly review our budget to find areas of improvement. If there are areas that are cheaper to contract while not losing quality then JLA will explore using contractors. JLA has already identified an area in which we believe we will use contracted services: special education services (speech and occupational therapy). For any contracted services or large expenditures JLA will seek to obtain at least three quotes for the services. Any long term contracts or large purchases will be submitted by the lead administrator to the board of directors for approval. In this way a large purchase will go through the business manager, lead administrator, and board before being approved.

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

Jordan Lake Academys proposed budget supports our mission of creating successful adults by partnering with families to support, engage and challenge our students. The budget invests in proven curriculum, such as Core Knowledge, that are designed so that every student finishes the program culturally literate. The budget also provides money for leadership development in the form of Covey Seven Habits of Highly Effective People

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training. An environment where personal responsibility, citizenship, strong academics, social skills and a moral focus are cultivated will require intentional planning and hands on support. The budget provides the needed administrators, teachers, and support staff to accomplish our goals.

The budget accounts for the curriculum outlined in the Instructional Program. We know that this is a large investment up front, but are confident that it will deliver high student outcomes. Although we will encourage parents to find independent means of transportation, monies have been set aside to ensure that every child that is enrolled can attend. The transportation budget also accounts for possible special needs that JLA will meet to ensure every student access to a free and appropriate education.

The facility budget is the largest item besides payroll. We are confident that we will ultimately secure a lease for far less than we have budgeted. However, we have set aside more than sufficient funds to ensure we have the buildings needed.

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

Jordan Lake Academy knows the importance of setting funds aside for the unexpected. Our goal will be to set aside 3% of funds in our second and third year and increasing to 5% thereafter with a goal to reach a cumulative 25% by our seventh year. The economy of scale allows more revenue to be set aside as the school adds grades in its later years. The current budget shows a surplus of a million a year. However, JLA knows it will invest some of those funds back into staff and students. We also know there are always unexpected costs. If we can set aside more funds and reach our goal quicker we will do so.

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

JLA will lease/finance the facility. The terms and details are below.

ECS would acquire a Property and fund 100% of the development of said property into a 700 student, K-8th grade public charter school campus that would be commonly referred to as Jordan Lake Academy (the "School Facility"), up to maximum of \$10,000,000. ECS would lease the School Facility to Tenant on a triple net basis (the "School Lease").

ECS reserves the right to review, recommend or approve any potential renovation or construction work and the Developer or General Contractor the School recommends to complete the same. Any construction contracts would be on a GMP Design-Build form approved by ECS.

Up to a cumulative maximum of \$10,000,000, which would include all costs associated with the acquisition, development and construction/renovation of a School Facility (including any development fees, accrued Construction Term Rent and Deferred Rent).

ECS and the School would enter into a NNN lease which would provide, among other things:

Lease Term: Construction period plus 20 years, with three (3) 5-year extension options.

Construction Term Rent: Construction rent for the School Property would

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accrue at 8.5% per annum of the expended ECS Contribution and would be added to the total Annual Rent amount at the end of the construction term.

Annual Rent: An annual rental amount (paid in 12 equal monthly installments) equal to ECSs Contribution multiplied by 8.5% with 2% annual escalations beginning in year 2.

For example: Year 1: 8.5%, Year 2: 8.67%, Year 3: 8.84% and so forth.

Rent Deferral: The School would be entitled to defer its first two months of Annual Rent, in which case the deferred rent would be capitalized and included into ECSs Contribution.

School Purchase Right: The School would have the option to purchase the School Facility at the end of Lease Years 3, 5, 7, 10, 15 and 20 for a purchase price equal to ECSs Contribution plus an "Exercise Fee" equal to 20% of the ECS Contribution. A Lease Year is defined as 12 full months of cash rent payments having been made to ECS.

NNN Lease: The Lease would be on an absolute triple-net basis, with the School responsible for the cost of all real estate taxes, insurance, maintenance, repair and replacement (capital or otherwise) costs, and all operating expenses

Subletting and Assignment: None permitted without ECS consent.

The issuance of any commitment or any other undertaking by ECS with respect to transaction described herein is subject to (1) the approval of the Board of Trustees and/or Investment Committee of EPR Properties in its sole and absolute discretion, (2) the School receiving an approved charter contract from the North Carolina State Board of Education and (3) ECSs satisfactory review of underwriting matters (financial or otherwise) and due diligence matters, which would include, among other items, the following:

- \* Condition and reputation of comparable traditional public and private schools in the specific Schools market;
  - \* Charter school market feasibility report;
  - \* Demographic and economic trends in the Schools market;
  - \* Title, survey, zoning, geotechnical, environmental, property condition and other factors affecting the Properties;
  - \* Projected capital expenditures for developing and opening the School;
  - \* Scheduling, qualification of design team and contractor, and other construction factors;
  - \* Projected initial and stabilized enrollments;
  - \* Projected initial and stabilized tuition level; and
- Projected initial and stabilized operating expenditures.

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

JLA does not plan on soliciting assets from other sources at this time. JLA would consider alternative sources for assets as part of our contingency plan.

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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?*

Jordan Lake Academy knows the importance of staying fiscally solvent. Fiscal solvency will require discipline and transparency. The business manager is responsible for keeping JLA compliant with all applicable laws and keeping JLA on budget. All purchases will flow through the office of the business manager and will require their approval or sign off. Purchase initiatives that begin in the business office will require the Lead Administrators approval. In this way there is oversight of the schools fiscal activities by the business manager and oversight of the business office by the Lead Administrator. The Lead Administrator will report on the fiscal doings of the school at each regular meetings of the board of directors and provide documentation for them to review. The board of directors will continue to refine policies around finances as they seek a healthy balance between correct governance oversight and leaving the day to day operations to the school administration.

Other means JLA will employ to maintain fiscal health include but are not limited to:

- Establish signatory authority and monthly bank account reconciliation.
- Required review and approval of purchase order requests by the business manager
- Monthly review of budget to actual detailed financial statements.
- Saving of all financial documentation including IRS form 990
- Fireproof lockable cabinet for financial records

Documentation for the regular board meeting will include:

- Income statement (revenue and expenses) with budget comparison.
- Cash Flow projection worksheet.
- Asset status report listing asset acquisitions, disposals, and needed repairs/maintenance.
- Enrollment report.
- Fundraising status report.
- Outstanding check report.
- General ledger summary report with detail available.

Each year JLA will contract with an uninterested firm to perform an independent audit. The business manager is responsible for ensuring that this audit is performed by the states deadline. Any discrepancies will be documented and reported to the board for their deliberation. Our goal is to be able to simply answer any question about our finances so that parents and other interested parties know where every tax dollar is spent.

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

Jordan Lake Academy does not anticipate any related party transactions.

*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*

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*investigated.*

The Board of Jordan Lake Academy is considering the following firms for auditing:

BDO USA, LLP, 5430 Wade Park Blvd Suite 208, Raleigh, NC 27607, 919-754-9370

Elliot Davis Decosimo LLC/PLLC 5410 Trinity Road, Suite 320, Raleigh, NC 27607, 919.783.7073

LB&A CPAs, 212 W. Mathews Street Suite 102, Matthews, NC 28105, 7048411120

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Why are students from Durham County listed for funding? What is the relationship between the board and ECS?	Shannon Sellers	Certify Fina
Appendix M and the facilities details need to be explored more intently, its is not clear if there are related party transactions.	Tracy Kelley	Certify Fina
I think the budget should be re-examined to use more of the funds in year one toward the education of the students.	Steven Walker	Certify Fina
Why wasn't Durham County included in the target student population or evidence of educational need sections?	Danielle Allen	Budget Reven
Durham was not a target area identified in Section 1, why is that? Target areas indicated are Apex, Carey, East Chatham County; what communities in Durham do you anticipate receiving students from? There was no mention of Durham in any narratives describing the communities to be served or need, why is it that Durham only surfaces in the budget section? Are there plans to actively recruit students from Durham County?	Tracy Kelley	Budget Reven
Durham county has not been listed until here. Why is that?	Shannon Sellers	Budget Reven
LEA funding sources do not align with Section 2 as it pertains to Durham County.	Tracy Kelley	Total Budget
what other assurances can you provide of working capital?	Deborah Brown	Total Budget
Health insurance line item is very low. \$700 for health insurance per person?	Danielle Allen	Personnel Bu
Why are your elective teacher salaries well below other certified staff? What is the justification for the salary for the lead and asst. admin?  Will you reward teachers who seek certification, advanced degrees, and/or National Board Certification? Will you have an athletics director?	Deborah Brown	Personnel Bu
Health care contribution is very low and the retirement may not seem competitive if trying to attract experienced teachers.	Heather Soja	Personnel Bu
Why are electric and gas costs fixed, although the school will increase in size, adding approx 12 additional classes over the first five years?  No money budgeted for custodial supplies/contract?  What is included in "Other professional"?  Why are gas (transportation) costs fixed, even when school increases in size from 700 to over 1000?  Several line items do not appear to take in account the increase in the size of the school over the first five years.	Danielle Allen	Operations B
Have you budgeted money for related services such as psychological, speech/language, occupational therapy, etc?	Ginger Cash	Operations B
Transportation was stated at \$55,000 in the application but I don't see that represented.	Heather Soja	Operations B
No custodial supplies are budgeted. The utilities are grossly understated for a building 55,000 square feet.		
There is no money set a side for custodial staff or supplies. Who will take on this role?	Shannon Sellers	Operations B
What is intended to fall under "instructional contract"? Will the school buy 2 used or new buses? The 20k budget is not enough to operationalize the transportation needs articulated in Section 5 (Operations).	Tracy Kelley	Operations B
Revenue projections that include Durham County do not align with the other sections of applicaiton.	Tracy Kelley	Total Expend

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Durham county listed as an LEA may create issues in this budget since originally, Durham was not listed as an LEA that students would come form.	Shannon Sellers	Total Expend
Is your personnel budget realistic with your goal of 90% teacher retention?	Deborah Brown	Total Expend
The surplus is very high in year one. What in the budget could be beefed up to provide more educational services or higher quality services to the students?	Steven Walker	Total Expend
Adjustments should be made to expenses that are projected very low. Also, with this kind of surplus, why not provide more health coverage or benefits to employees.	Heather Soja	Total Expend
How can you count on an alternative revenue stream from sub leasing if you have not yet secured a site? How realistic is it to lease busses and technology equipment and space in a school while still operating that school?	Deborah Brown	Budget Narra
What type of contract do you have with ECS? What happens if you do not draw students from Durham County?	Shannon Sellers	Budget Narra
The student to teacher ratio should be 26 to 1 not 20 to 1 as stated in the applicaiton, why is there a descrespency? The financial contingency plan is not described in enough detail to evaluate its viabilty. The projected source of revenue is not realistic as there are no plans to recruit from Durham and Durham was never identified as a target area. There is a lack of clarity around what is meant by "instructional contracts", is there a plan to contract out the instructioanl aspects of the school to a EMO/CMO?	Tracy Kelley	Budget Narra
Double-check break even number. What is the lowest number of students the school could enroll without having to make any budget adjustments?	Danielle Allen	Budget Narra
Internal controls are not "thoroughly" described.	Heather Soja	Financial Au
Internal controls arae not aligned with GAAP. There is no limit to purchasing power before Board approval is triggered.	Tracy Kelley	Financial Au
Your application lists firms you are considering, but not one that has been secured?	Deborah Brown	Financial Au

Reviewer	Score
Steven Walker	Fail
Deborah Brown	Fail
Danielle Allen	Fail
Cheryl Turner	
Alan Hawkes	
Alex Quigley	
Deborah Brown	
Ginger Cash	
Stephenie Clark	
Shannon Sellers	Fail
Shannon Sellers	
Lynn Kroeger	
Tracy Kelley	Fail
Joe Maimone	
Jennifer Gnann	Pass
Heather Soja	Pass



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\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Official Seal

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

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## **OVERALL ASSESSMENT**

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

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

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.

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

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.

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>

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

<b><u>Initial Screening</u></b>
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<b>Mission, Purposes, and Goals</b>	- danielle_allen
<b>Education Plan</b>	- danielle_allen
<b>Governance and Capacity</b>	- danielle_allen
<b>Operations</b>	- danielle_allen
<b>Financial Plan</b>	- danielle_allen
<b>OVERALL</b>	- danielle_allen - danielle_allen - danielle_allen

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Is this mission statement for the school or the board of directors? - jengnann</p> <p><u>Mission Statement</u> The mission statement focuses more on inputs (i.e. Covey, relationships) rather than outputs and does not describe or express the schools' lofty purposes or paint a picture of how the school will be transformative and evidence high expectations. More attention and thought should go into what fundamentally the group believes about education, and the possibilities of a good quality rigorous ed plan. - kelleytracy1</p> <p><u>Mission Statement</u> The mission statement appears to be more for the board than for the school itself. It doesn't address what the school is setting out to do in order to transform and be different than other schools. - shannon9402</p> <p><u>Mission Statement</u> What does it mean for your school to have a "moral focus"? - deborahbrownnc</p> <p><u>Mission Statement</u> Mission needs additional clarification- it's unclear exactly what the focus of the school will be. - danielle_allen</p> <p><u>Mission Statement</u> The mission statement feels a little weak to me. - dswalker</p> <p><u>Mission Statement</u> Purpose is not clear. Do not see the need or urgency for this charter as a means to help with waitlists. - heather_soja</p> <p><u>Educational Need and Targeted Student Population</u> How is this school different from traditional public schools other than the grades served?</p>
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	<p>How many people returned the survey? - jengnann</p> <p><u>Educational Need and Targeted Student Population</u> The demographic evidence for why the commnities need a charter school are not complelling, especially since the applicaiton states that "diverse relationships are best cultivated in a smaller school setting." but the proposed school will open with 702 students and grow to 1062 stuents. Its not clear what point the team is tryin to make my stating that 20% of Carey residents were born outside the country and 22% speak a language other than English, especially since this dose not align with the racial and ethnic breakdown showing the 72% are white; 8% African American and 13% Asian. What point is the team trying to make? The team does not indicate that there is low socioeconomic status in the community as a reason for more school options. The team indicates that "easing overcrowding is not the sole mission" of the proposed school and seems to make the case against larger schools because they "have greater difficuluty establishing close personal relationships". So why do you want to hopen this school? Why is there no description or data presented showing academic performance of the LEA schools in the are or the few charter school, either? Who and or what students will the school be targeting, and why? - kellelytracy1</p> <p><u>Educational Need and Targeted Student Population</u> The rationale for the school is confusing and contradicts itself. The application states that smaller school setting is needed, but your projected enrollment is 702. How is this a smaller setting? HOW will your educational plan differ from the LEA? The survey conducted doesn't prove that a school is needed nor doe it help support your projected enrollment. What is your target population? - shannon9402</p> <p><u>Educational Need and Targeted Student Population</u> Given the proximity to the Durham County border, would the school consider including Durham families? Given the large number of Asian families in the Morrisville area, and the number of cultural resources available, why is a new school the best vehicle for cultivating diverse relationships? If the school's mission is to encourage diversity, how will reflecting the area's 73% white population accomplish that goal? How will new schools opening up in this area of Wake solve the overcrowding issue without the need for a charter? - deborahbrownnc</p> <p><u>Educational Need and Targeted Student Population</u> Given the racial demographic data presented (and the stated desire to foster a community that celebrates a variety of cultures, languages, and histories), how will school work to ensure a diverse student population?  700+ students is quite a sizable student population, but the applicant gives several reasons why larger schools are ineffective. Please clarify.  "Focus on cultural literacy" is unclear.  Data on the academic performance of schools in the area surrounding the proposed school would be helpful here.  Additional clarification needed on how the school's ed plan differs from the LEA.</p>
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Survey data doesn't support the ambitious student enrollment projections, especially for year 1.

- danielle\_allen

Educational Need and Targeted Student Population

The mission is not clear: relationships and effective curriculum. - heather\_soja

Purposes of Proposed Charter School

According to the previous section, there are virtually no cultural or socioeconomic background differences or targeted student populations, so how will the community of parents know that your proposed school is going to be different? What evidence do you have to substantiate the statement that "our target area has a large immigrant population? The plan is for the school to have 26 kids in a classroom, why does the team claim to have smaller class size than LEA if over crowding is not a problem? What specific concerns do parents have with school size? - kellelytracy1

Purposes of Proposed Charter School

How will you improve instruction?

Why is this school needed if parent concern is school size, when your school will be large as well? - shannon9402

Purposes of Proposed Charter School

If your school will be 73% white, like the local LEA, why is a curriculum that works to overcome the achievement gap the best fit?

What "values" do you propose your teachers will cultivate? How will you "develop trust" in your community?

What legislative purpose are you working on, other than expanding a choice of a small school? - deborahbrownnc

Purposes of Proposed Charter School

Charter schools are generally smaller schools. The mission and purpose of this school is not clear. - heather\_soja

Goals for the Proposed Charter School

How do you propose achieving a 90% teacher retention rate, when the retention rate for the area is well below that?

If one of your goals for choosing your curriculum is that it is effective in reducing the achievement gap, how do these goals and benchmarks show growth for minority populations? - deborahbrownnc

Goals for the Proposed Charter School

The mission statement mentioned personal responsibility, citizenship, social skills, and a moral focus- has the board considered creating any goals to measure the school's success in imparting those skills to students?

- danielle\_allen

Goals for the Proposed Charter School

The goals appear to be reasonable. - dswalker

Goals for the Proposed Charter School

Not all goals are measurable. Finance leaves a lot of questions. - heather\_soja

Certify Mission, Plan, Goals

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	<p>There significant statements that do not align with facts and data especially with regard to demographics and rationale and mission description. The purposes are further evidence that the team lacks a focus and clarity as to whythe school is necessary.</p> <p>The clasim that a large k12 with 1000 students is somehow ok but a large K-5 or K-8 with a 1000 student is not is a distinction in search of a difference.The purposes are not clearly aligned to the proposed mission. Evidence of need is not compelling as the team only provided a summmary of the comments recieved and no actual surveys, sign in sheets, agendas, name tags, pictures etc were provided showing that families support the new school proposed. The summary comments provided to not speak to academic performance at all. - kellelytracy1</p> <p><u>Certify Mission, Plan, Goals</u> Why is the school needed? If size is a concern for parents, how is a large K-12 school different? Goals aren't clearly aligned. - shannon9402</p> <p><u>Certify Mission, Plan, Goals</u> How is this application different from the application last year for Liberty Leadership? - deborahbrownnc</p> <p><u>Certify Mission, Plan, Goals</u> Mission and need for the school are unclear. Applicant should provide additional evidence for the need/desire for a school of this size, in this particular location. - danielle_allen</p> <p><u>Certify Mission, Plan, Goals</u> Mission and purpose remains unclear so far in application. - heather_soja</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> What is the connection between the proposed instructional practices (Covey)and the schools mission? How will instruction be differentiated to meet student needs? What quantifiable research data do you have showing the proposed practices will support student learning? - kellelytracy1</p> <p><u>Instructional Program</u> What evidence exists that proves this type of instruction will improve student performance? - shannon9402</p> <p><u>Instructional Program</u> The data for your effectiveness of an explicit, direct instructional model is from 2004 and 2010. How will your program apply the newer data that shows personalized, experiential and project based programs often produce more student achievement? How does a "moderately scripted curriculum" allow for teachers to personalize for their own students? - deborahbrownnc</p> <p><u>Instructional Program</u> What evidence does the applicant have that the proposed approach will lead to improved student performance for the school's targeted population? - danielle_allen</p> <p><u>Instructional Program</u> CK and Saxon math are vetted but implementation and teacher effectiveness matter. This school does not present as an innovative approach to learning in this area. Specifically, it will be situated in affluent areas and its main teaching strategy will be direct instruction. - heather_soja</p> <p><u>Curriculum and Instructional Design</u></p>

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Please explain further how instruction will be differentiated within the classroom for students with different learning needs. - jengnann

Curriculum and Instructional Design

The curriculum framework is not presented clearly and does not align with the schools stated mission and goals

The description of the curriculum lack sufficient detail to determine whether it is aligned across the school for all grade levels?

What research do you have to support the chosen curriculum? Why was Saxon math selected, what other math curricula did the team consider?

- kellelytracy1

Curriculum and Instructional Design

How will the curriculum be differentiated to reach all students. - shannon9402

Curriculum and Instructional Design

Basic learning environment, class size, and structure described.

Unclear how the curriculum/instructional design and school calendar align with the full mission outlined at the beginning of the application. There was an explicit focus on relationships, personal responsibility, citizenship, strong academics, social skills, and a moral focus. Aside from perhaps the academic focus, it's unclear how this curriculum/calendar will help the school build relationships or cultivate personal responsibility, citizenship, social skills, moral focus, etc.

With such an explicit focus on direct, whole group instruction, more detail is needed on what differentiation will look like in the classroom, and what flexibility teachers will have to tailor instruction. - danielle\_allen

Curriculum and Instructional Design

The plan involves a purchased curriculum that is implemented through direct instruction. All students would mean that the plan thoroughly considered the varied learning styles and abilities of all students. - heather\_soja

Special Programs and "At-Risk" Students

Once identified, what services/interventions will at-risk students receive? Where? By whom?

Applicant should explain their understanding of MTSS. - jengnann

Special Programs and "At-Risk" Students

What critical systems, structures, processes (data, staff, time, meetings, protocols) will be in place to implement the "kid watch" efforts? How will the school define "at risk" for teachers and staff? How will school ensure 1st instruction is strong to avoid over diagnosis for SPED? - kellelytracy1

Special Programs and "At-Risk" Students

How often will the SST meet? HOW is the support provided to the student? What solid data is used during the 45 day screening? What interventions will be used? Who does the "kid watching" and what is used to determine if a student is struggling just by watching the student?

What qualifications will the assistant administrator have that will make him/her qualified to work with ELL students?

- shannon9402

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Special Programs and "At-Risk" Students  
What training will be provided to staff regarding the use of evidence based practices?  
How will the implementation of teaching practices be monitored to ensure all students are receiving high quality instruction? - ginger\_cash

Special Programs and "At-Risk" Students  
There is a significant emphasis placed on relationship building and the value of a small school, but there doesn't appear to be the same emphasis placed on implementing a specific, actionable plan to help teachers build relationships with students. Kid-watching will be an important part of the fabric of the school- more detail on how this will be institutionalized and what systems will be put in place to ensure students don't fall through the cracks (because this school will be a large one) is needed.

How will AIG teacher's time be split between offering services to grades 3-5 and supporting teachers in the other grades? - danielle\_allen

Exceptional Children – Identification and Records  
What is your process for reviewing files for compliance as students transfer in to your school?  
How will you document access to the EC folder for authorized personnel who need additional information?  
What is your process/procedure for handling referrals for testing throughout the year? - ginger\_cash

Exceptional Children – Education Programming  
While paraprofessionals can provide instruction under the supervision of a licensed exceptional children's teacher, they can not be the provider of specially designed instruction. That responsibility falls to the licensed exceptional children's teacher and/or related service provider.  
You state that you will provide the full continuum of services. What is your process for allocating resources to provide the full continuum of services? - ginger\_cash

Exceptional Children – Education Programming  
How will EC services be delivered? - deborahbrownnc

Exceptional Children – Education Programming  
Nothing specific provided for programming and curricular specifics that support or enrich students with disabilities. - heather\_soja

Student Performance Standards  
What assurances does the team have that Galileo is a predictor of success on EOY state assessment? What will teachers do with the benchamrk data? How will teachers be coached on how to unpack the data and anlaze it? What structures, processess and systems will need to be in place in order for teachers to act on the data? - kellelytracy1

Student Performance Standards  
How often will benchmark test be given? How do you know Galileo test are comparable to the NC EOC/EOG's?  
How will teachers know how to use the data to drive instruction? - shannon9402

Student Performance Standards  
What role do grades play in promotion if scoring at or above GLP in both Reading/Math means a student is automatically promoted? Is the EOG/EOC 100% the determining factor

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	<p>for promotion in those cases?</p> <p>(How) Will the board measure students' growth towards stated mission (relationships, personal responsibility, citizenship, strong academics, social skills, moral focus)? - danielle_allen</p> <p><u>Student Conduct and Discipline</u> What curriculum will be used in Citizenship class? What role will Covey play in creating and sustaining the school's culture? What and how and when will the school teach the schools core values, pillars, norms, celebrations, common language and core beliefs in a grade appropriate consistent manner? - kellestracy1</p> <p><u>Student Conduct and Discipline</u> Does the citizenship class have a curriculum? - shannon9402</p> <p><u>Student Conduct and Discipline</u> How will you "establish a culture that teaches students personal responsibility, citizenship, and social skills?" What specific programs or methods will make this happen for your students? Will reciting a mission statement and seeing weekly skits accomplish this goal? How will you work on reducing the number of out of school suspension rates? Have you explored the newer research on how suspensions are often ineffective and newer programs, like restorative justice, can lead to better outcomes and reduced recidivism? 1 day of ISS for a first offense seems severe. What smaller steps might you employ to encourage students to modify behavior before moving to a suspension? - deborahbrownnc</p> <p><u>Student Conduct and Discipline</u> Will all students take Citizenship each year? Is there a specific curriculum for this? - danielle_allen</p> <p><u>Certify Education Plan</u> The ed plan lacks evidence of effectiveness and provide insufficient details to assess the quality of the proposed plan. There is significant aspects of the ed plan that do not align with the mission, including culture/behavior, assessment plan, and at risk students. - kellestracy1</p> <p><u>Certify Education Plan</u> How will you determine At-Risk students and then what intervention is used to help them? The curriculum is confusing. Benchmark testing is not clear that it is effective in NC. - shannon9402</p> <p><u>Certify Education Plan</u> There is a plan because it is being purchased. Innovation is lacking given the number of charter schools in Wake. - heather_soja</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> 501 (c) (3) still needs to be obtained. - deborahbrownnc</p> <p><u>Certify Governance</u> Projected enrollment seems unrealistic. - shannon9402</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Please explain further why a term of seven years was selected for a director? How will that requirement factor into the recruitment of directors?</p>

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	<p>The by-laws do not specify the number of board members that the organization shall have. - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> What other relationships does the board have American Leadership Academy besides the directors mentioned? How will the board evaluate itself and the administrator? - shannon9402</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> 3/7 of your board is listed as "Full time Mom." What expertise or perspective do they bring to the Board, and what value is there is to having 3 people from that background? What is the rationale behind having Peart and Bonney take the lead on education, if that is not their background? Two of your board members work at the same location. Would your board be stronger with more diversified experience? Are Trudy and Greg McCloud related, and if so, does that form a potential conflict? What would be the removal process for a board member? How will your board represent a diverse student population when so many attended the same university and live in the same street/neighborhood? Do all of your board members agree on what is a "moral" and "wholesome" education, and how will you work with families who might have different interpretations of those terms? How will board members be evaluated? - deborahbrownnc</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will board evaluate itself? How will board know if students are meeting the stated mission of the school, especially related to traits such as citizenship, morality, personal responsibility, etc.?  Bylaws should include the min and max number of board members.  Is board confident that the directors have varied enough expertise to successfully govern? - danielle_allen</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Besides the proposed school leaders connection to American Leadership Academy what other connection does the proposed school have to either ALA or Charter One or Schoolhouse Development LLC or Schooldev East? Why did Liberty Leadership Academy come together as a group? How was Covey integrated into the other schools Mr Enkey w as affiliated with? How did the Board first meet Mr Enkey? Where is Mr Enkey currently employed and where does he live now? Please describe (dates, locations, attendees, agendas, feedback)the public interest meetings the team held. - kellelytracy1</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> I'm concerned about the lack of education experience on the board. - dswalker</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Acceptable - heather_soja</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A, no EMO/Cmo - deborahbrownnc</p> <p><u>Staffing Plans, Hiring, and Management</u> The Grievance policy is vague with no time frame. Will the board not vote on hiring teachers? The application makes it sound like the</p>
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administrator will hire and then the board may review. - shannon9402

Staffing Plans, Hiring, and Management  
How will you "be aggressive in pursuing great candidates"? What does that look like?

How will you attract so many special programs candidates when they are in high demand?

What do "market competitive" salaries look like?  
In attracting "high quality" candidates, will you offer extra pay for advanced degrees, NBCTEs, and/or high demand fields?

Much research says teacher retention is based more on administration, not peers. What will you do to ensure solid staff-admin relationships and vision?  
How will you "respecting their classroom and educational expertise" when you are proposing a packaged and recitative curriculum?  
The notion that employees can be fired at will, but that they won't because it won't be "part of the culture" does not seem logical or designed to reassure potential candidates?  
If the administrator and so many of board members are all connected through the same university, how will an employee be assured of a fair hearing if they have a grievance with the administrator? - deborahbrownnc

Staffing Plans, Hiring, and Management  
Acceptable - heather\_soja

Staff Evaluation and Professional Development  
Will beginning teachers be assigned a mentor? How often will they meet? - shannon9402

Staff Evaluation and Professional Development  
What will "Daily interaction with administrators" look like, and will admin be able to commit to that?  
Same to weekly walk throughs and observations, and quarterly evaluations-- how will you maintain that ambitious a schedule and still be able to handle other administrative duties?

What kind of a cycle of support will you have for BT teachers? How will mentor teachers be selected, trained, and evaluated? How will you document your support for BTs?  
How was the \$50,000 for "training" sum arrived at? What kind of training will you be paying for? Is that a yearly amount, a start up amount? or something else?  
Who will provide the training in the opening weeks? How will you select and personalize and/or differentiate PD ongoing?  
Will you pay teachers for professional development in the summer?  
Who will lead/plan PD throughout the year?  
Is 45 min a day of planning enough for teachers to be able to plan lessons, respond to student work, and observe each other? - deborahbrownnc

Staff Evaluation and Professional Development  
I am not sure that there is enough time set aside for teachers to learn how to implement core knowledge and Saxon math given the other things being focused on but it is not clear in the plan. - heather\_soja

Marketing Plan  
Dates listed here are not in alignment with an Accelerated application - jengnann

Marketing Plan  
Why does your target market not include Durham, when your proposed site is as close to

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	<p>that market as to, for example, Holly Springs? Wouldn't recruiting from Durham County help to achieve a more diverse student population?          Will you recruit from areas that are not as white and not as prosperous economically than the areas you are proposing for a target?          Will you provide application and marketing materials in any language other than English?          - deborahbrownnc</p> <p><u>Parent and Community Involvement</u>          How can the PSO be an effective independent organization if admin is its head?          How will you communicate with families who may not have internet access?          How will you involve parents who may have childcare issues or a work schedule that is not traditional-- who may not be able to attend evening meetings or "family fun nights?" - deborahbrownnc</p> <p><u>Projected Student Enrollment (Table)</u>          702 students in the first year seems unrealistic. - shannon9402</p> <p><u>Projected Student Enrollment (Table)</u>          You list an expected enrollment of 320 from Durham Public schools, yet none of your marketing was targeted at Durham County? - deborahbrownnc</p> <p><u>Projected Student Enrollment (Table)</u>          Enrollment projections are very ambitious. - danielle_allen</p> <p><u>Projected Student Enrollment (Table)</u>          Not a realistic projected enrollment growth chart. K-8 is a large number to start with. - kelleltracy1</p> <p><u>Projected Student Enrollment (Table)</u>          I am not convinced that it is realistic. It is a lot to tackle in the first year. What is the plan for athletics? - heather_soja</p> <p><u>Weighted Lottery</u>          Will you allow for siblings automatic admissions and preferential admission for families with a child already enrolled?          Will employees' children be offered preferred admission? - deborahbrownnc</p>
<p><b>Operations</b></p>	<p><u>Certify Operations</u>          Are Mr Archunde and Mr Enkey in any way still affiliated with American Leadership Academy, Glenn Way, Brand brothers, Charter One in Arizona? - kelleltracy1</p> <p><u>Certify Operations</u>          Which county does the school plan to locate? The beginning of the application states Wake but in this section it states it will be located in Chatham County. - shannon9402</p> <p><u>Certify Operations</u>          I do have some facility concerns and need to discuss the contingency plan in more detail. It has been very hard to build a charter in Wake County recently. - dswalker</p> <p><u>Transportation Plan</u>          The application is for a Wake County Charter School, but here you say the school will be in Chatham County, why the discrepancy? - shannon9402</p> <p><u>Transportation Plan</u>          If you need to purchase additional busses and hire drivers, how will you accommodate</p>

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	<p>those expenses? How will your location facilitate walking, when the areas you mention often do not have sidewalks or safe walking pathways and pedestrian crosswalks? - deborahbrownnc</p> <p><u>Transportation Plan</u> Will two buses be enough to transport any students who require it?  Please clarify where the school will be located- Chatham or Wake County? - danielle_allen</p> <p><u>Transportation Plan</u> The plan is to purchase 2 buses year 1 but the budget shows just 20k for year 1, why is that? Does the team intend to buy new or used school busses? - kellelytracy1</p> <p><u>Transportation Plan</u> The application says that it plans to locate in Wake County and not Chatham as indicated in this part of the application. - heather_soja</p> <p><u>School Lunch Plan</u> Is there any plan for providing breakfast if it turns out that your students are arriving at school from homes where food security is an issue? - deborahbrownnc</p> <p><u>Civil Liability and Insurance</u> Quote does not match insurance line item in budget. - danielle_allen</p> <p><u>Facility and Facility Contingency Plan</u> The applicant should clarify when they intend to open. Building a school will take longer than the 10 months an accelerated year gives them. Will year one definitely be housed in trailers while the school is built? Or is this a contingency plan? - jengnann</p> <p><u>Facility and Facility Contingency Plan</u> What is Mr Enkey's relationship with Education Capital Solutions? Are there any third party transactions that need to be disclosed? Is there a connection between ECS and American Leadership Academy, Schoolhouse Development LLC, Schooldev East, or the Brand brothers, or Glenn Way? - kellelytracy1</p> <p><u>Facility and Facility Contingency Plan</u> What other partners have you made arrangements with? WERE funds spent or given by Education Capital Solutions that should be disclosed? Which county is the facility located since there is a discrepancy of county in this section? - shannon9402</p> <p><u>Facility and Facility Contingency Plan</u> How will you ensure diverse families feel welcome if your contingency plan of needing a church for a school site needs to be implemented? What evidence can you offer other than "we have experience" to ensure that your facility is appropriate and adequate? - deborahbrownnc</p> <p><u>Facility and Facility Contingency Plan</u> A facility in the first year requiring a specific number of students to cover the cost can be daunting. - heather_soja</p>
<b>Financial Plan</b>	<p><u>Certify Finance</u> Appendix M and the facilities details need to be explored more intently, its is not clear if</p>

<p>there are related party transactions. - kellestracy1</p> <p><u>Certify Finance</u> Why are students from Durham County listed for funding? What is the relationship between the board and ECS? - shannon9402</p> <p><u>Certify Finance</u> I think the budget should be re-examined to use more of the funds in year one toward the education of the students. - dswalker</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Durham was not a target area identified in Section 1, why is that? Target areas indicated are Apex, Carey, East Chatham County; what communities in Durham do you anticipate receiving students from? There was no mention of Durham in any narratives describing the communities to be served or need, why is it that Durham only surfaces in the budget section? Are there plans to actively recruit students from Durham County? - kellestracy1</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Durham county has not been listed until here. Why is that? - shannon9402</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Why wasn't Durham County included in the target student population or evidence of educational need sections? - danielle_allen</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> LEA funding sources do not align with Section 2 as it pertains to Durham County. - kellestracy1</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> what other assurances can you provide of working capital? - deborahbrownnc</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Why are your elective teacher salaries well below other certified staff? What is the justification for the salary for the lead and asst. admin?</p> <p>Will you reward teachers who seek certification, advanced degrees, and/or National Board Certification? Will you have an athletics director? - deborahbrownnc</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Health insurance line item is very low. \$700 for health insurance per person? - danielle_allen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Health care contribution is very low and the retirement may not seem competitive if trying to attract experienced teachers. - heather_soja</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What is intended to fall under "instructional contract"? Will the school buy 2 used or new buses? The 20k budget is not enough to operationalize the transportation needs articulated in Section 5 (Operations). - kellestracy1</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> There is no money set a side for custodial staff or supplies. Who will take on this role? - shannon9402</p>
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<p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Have you budgeted money for related services such as psychological, speech/language, occupational therapy, etc? - ginger_cash</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Why are electric and gas costs fixed, although the school will increase in size, adding approx 12 additional classes over the first five years?</p> <p>No money budgeted for custodial supplies/contract?</p> <p>What is included in "Other professional"?</p> <p>Why are gas (transportation) costs fixed, even when school increases in size from 700 to over 1000?</p> <p>Several line items do not appear to take in account the increase in the size of the school over the first five years. - danielle_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Transportation was stated at \$55,000 in the application but I don't see that represented.</p> <p>No custodial supplies are budgeted. The utilities are grossly understated for a building 55,000 square feet. - heather_soja</p> <p><u>Total Expenditure Projections (Table)</u> Revenue projections that in include Durham County do not align with the other sections of applicaiton. - kellelytracy1</p> <p><u>Total Expenditure Projections (Table)</u> Durham county listed as an LEA may create issues in this budget since originally, Durham was not listed as an LEA that students would come form. - shannon9402</p> <p><u>Total Expenditure Projections (Table)</u> Is your personnel budget realistic with your goal of 90% teacher retention? - deborahbrownnc</p> <p><u>Total Expenditure Projections (Table)</u> The surplus is very high in year one. What in the budget could be beefed up to provide more educational services or higher quality services to the students? - dswalker</p> <p><u>Total Expenditure Projections (Table)</u> Adjustments should be made to expenses that are projected very low. Also, with this kind of surplus, why not provide more health coverage or benefits to employees. - heather_soja</p> <p><u>Budget Narrative</u> The student to teacher ratio should be 26 to 1 not 20 to 1 as stated in the applicaiton, why is there a descrepancy? The financial contingency plan is not described in enough detail to evaluate its viabilty. The projected source of revenue is not realistic as there are no plans to recruit from Durham and Durham was never identified as a target area. There is a lack of clarity around what is meant by "instructional contracts", is there a plan to contract out the instructioanl aspects of the school to a EMO/CMO? - kellelytracy1</p> <p><u>Budget Narrative</u> What type of contract do you have with ECS?</p>
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	<p>What happens if you do not draw students from Durham County? - shannon9402</p> <p><u>Budget Narrative</u> How can you count on an alternative revenue stream from sub leasing if you have not yet secured a site? How realistic is it to lease busses and technology equipment and space in a school while still operating that school? - deborahbrownnc</p> <p><u>Budget Narrative</u> Double-check break even number. What is the lowest number of students the school could enroll without having to make any budget adjustments? - danielle_allen</p> <p><u>Financial Audits</u> Internal controls arae not aligned with GAAP. There is no limit to purchasing power before Board approval is triggered. - kelleltracy1</p> <p><u>Financial Audits</u> Your application lists firms you are considering, but not one that has been secured? - deborahbrownnc</p> <p><u>Financial Audits</u> Internal controls are not "thoroughly" described. - heather_soja</p>
<p><b>OVERALL</b></p>	<p><u>Grade Levels Served and Total Student Enrollment:</u> What is the rationale for starintg with 702 students across elementary and middle school? - kelleltracy1</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Projected numbers seem ambitious and unrealistic. - shannon9402</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Given the new schools opening in this area, how will you draw new families into a charter? - deborahbrownnc</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Year 1 projection is quite ambitious. Several evaluators gave feedback on the previously submitted application that opening K-8 with 702 students was not tactical or realistic. Applicant may want to clarify why these numbers were not revised for the newly submitted application. - danielle_allen</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> What is the rationale for starting a K-8 school? - dswalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Proposed enrollment in a saturated market seems ambitious and challenging. There is a great deal of testing in all of the grades represented. - heather_soja</p> <p><u>Certify Application</u> Enrollment projects are unrealistic and not lilley to result in improved outcomes for students. - kelleltracy1</p> <p><u>Certify Application</u> Projected numbers are unrealistic. - shannon9402</p> <p><u>Certify Application</u> Missing items as listed above. - deborahbrownnc</p>

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	<u>Certify Application</u> Enrollment is over zealous in a saturated market. - heather_soja
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<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and Goals</b>	
<b>Education Plan</b>	
<b>Governance and Capacity</b>	
<b>Operations</b>	
<b>Financial Plan</b>	
<b>OVERALL</b>	

<b>Overall Summary</b>	
<b>Initial Screening</b>	The Office of Charter Schools deemed this application complete on October 5, 2018.
<b>Application Review</b>	<p>Dr. Allen stated that Jordan Lake Academy is proposed to locate in Wake County. Dr. Allen gave a brief introduction of the schools proposed enrollment and grade levels. There is not a LEA impact statement or a due diligence for this applicant. Dr. Allen reviewed the pass/fail ratings for this applicant. She stated the applicant has no special requests. She stated the applicant is a repeat application but did not move forward to a full interview last year. The applicant did not receive third party assistance and the application was deemed complete.</p> <p>* Ms. Hawke introduced herself as a board member. A board representative stated several board members are traveling and therefore unable to attend. A board representative stated that the school is not involved with Charter One in any form, but some board members used to work for Charter One.</p> <p>* A board representative spoke about the need for a charter school in their proposed location. He stated that 1400 kids based on the data would be reasonable, but maybe not ideal.</p> <p>* Ms. Vuncannon wanted clarity about the purpose of the school. A board representative stated that they are trying to build a community. He stated their proposed school would be small in comparison to others in the area. He stated the school wants to represent the community. He stated the board believes it would be worthwhile to offer that opportunity to families in the area. Ms. Vuncannon asked if there is a weighted lottery. A board representative stated they wanted to do first come first serve but will do a lottery if</p>

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	<p>necessary. The CSAB stated the law is clear that lotteries are required if need outweighs space. A board representative stated they would do whatever is required.</p> <p>* Mr. Walker stated he had concern about the budget. He stated the 1M plus budget surplus seems like leaving a lot of money on the table that could be used to serve students.</p> <p>* Ms. Vuncannon stated the health insurance budget seems very low.</p> <p>A board representative stated it should be \$700 per month which would take up a lot of the surplus in the budget. He stated that the school hopes that a lot of up-front purchases would be rolled into the building lease costs.</p> <p>* Ms. Reeves asked why they have changed location from Chatham to Wake County from last years application. A board representative stated the location is right on the border and they have found a piece of land in Wake County which prompted the change.</p> <p>LK Committee motion not to allow JLA to continue to full interview. HV second. Vote: SW, HV, LK, CT. Opposed: AH</p> <p>Motion passed.</p> <p>SW Full CSAB motion to not allow Jordan Lake Academy to continue to full interview. CT second. Vote: CT, LKr, SW, AQ, LK, TS, SR</p> <p>Opposed: AH, BF, PG</p> <p>Motion passed.</p>
<p><b>Application Interview</b></p>	
<p><b>OVERALL</b></p>	