



**PUBLIC SCHOOLS OF NORTH CAROLINA**

State Board of Education | Department of Public Instruction

North Carolina Charter School Application

Oak Grove Charter Academy

Opening in the 2021-2022 School Year

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## Application Instructions

APPLICATION AND APPLICATION FEE DUE DATE/TIME	
Fast-Track and Acceleration Applicants (2020 Opening)	<b>5:00pm EST on July 29, 2019</b>
Traditional Timeline Applicants (2021 Opening)	<b>5:00pm EST on August 26, 2019</b>

### APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline. **All applications must be submitted using the online portal.** Applicants are to use the following specifications:

1. All applications must be submitted using the online platform. Applications submitted outside of this platform will not be accepted.
2. All submitted applications must be from a nonprofit group approved by the NC Secretary of State, unless being submitted by a municipality.
3. Each major section (Mission, Purposes and Goals, Education Plan, Governance and Capacity, Operations, and Financial Plan) must be located within the designated section, as indicated in the online document.
4. If a particular question does not apply to your team or proposal, respond "Not Applicable," AND state the reason this question is not applicable to your team or proposal.
5. Each required Appendix must include a title page with the title of the Appendix and the Proposed School Name.
6. Any answer given within the application that is not original to the applicant must include a citation to the source of the answer.
7. Review all elements of the application for completeness before submitting.
8. The full application (including the narrative and all appendices) must be submitted as one PDF document.
9. The budget spreadsheet must also be submitted separately as an excel file.
10. The application narrative, without appendices, may not exceed 100 pages. Applicants submitting special requests are given an additional 5-page allowance, per special request.
11. Each section of the application should be clearly labeled according to the table of contents.
12. Late submissions **will not** be accepted. **No exceptions.**
13. Applicants must turn in the application fee and fee payment form by the stipulated timeline.

## Application Contact Information

1. Name of Proposed Charter School: Oak Grove Charter Academy (OGCA)
2. Organization Type: Municipality Nonprofit Corporation
3. Name of non-profit organization under which charter will be organized or operated: Oak Grove Charter Academy, Inc.
4. Has the organization applied for 501(c)(3) non-profit status? Yes No N/A (Municipal)
5. Provide the name of the person who will serve as the primary contact for this Application. The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application.

Name of Contact Person: Gerald McNair  
Title/Relationship to Non-Profit: Lead Applicant  
Mailing Address: 1198 Summerfield Lane East  
City/State/Zip: Creedmoor, NC 27522  
Primary Telephone: 919-576-3337  
Alternate Telephone: N/A

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

Geographic County: Durham  
LEA/District Name: Durham County Schools

7. Was this application prepared with the assistance of a third-party person or group?  
Yes  
No

Give the name of the third-party person or group: National Heritage Academies (NHA)  
Fees provided to the third-party person or group? N/A

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

The community leaders proposing Oak Grove Charter Academy in Gorman do so only after extensive research and reflection on the opportunities and challenges inherent in our vision. We have worked closely with our management partner, National Heritage Academies (NHA). NHA's schools have a record of success, in North Carolina and eight other states, and we think Gorman and its families will benefit if Oak Grove replicates the success of NHA's North Carolina schools, especially Wake Forest Charter Academy. In fact, NHA's record in North Carolina and in our region is unmatched among all charter schools and charter organizations.

Because we seek to replicate NHA's model, we worked closely with NHA professionals on parts of this application, especially in describing key features of the model. In verifying details on the model and enriching the picture with insights only experience can provide, NHA professionals ensured that our application appropriately describes key facets of its model, including:

- The educational plan, including the curriculum and the tools and methods of instruction;
- Educational opportunities for at-risk students, English language learners (EL), and exceptional children (EC);

- Discipline;
- Administration and staffing;
- Professional development for teachers and administrators; and
- Marketing and enrollment.

We want to emphasize that, notwithstanding the value of this collaboration and the contributions of NHA professionals, it is the founding Board submitting this application, and it is, in all aspects, our application. We have created the proposed vision and mission; we have determined our intended approach to governance. Through any this application, descriptions of all these matters closely reflects *our* thinking. To draft goals for academic success and operational priorities, we collaborated with NHA's professionals. NHA's experience setting and pursuing goals is, we realized, so extensive it would be unwise for us not to tap it.

We have learned that a second group of community volunteers has been planning an application for a new North Carolina charter school to be operated by NHA. Because applications all address the same questions, we also know some parts of our narrative may resemble a second proposal. We emphasize again that this application to replicate NHA's model is this Board's. We also note that our attorney, who represents the Board and functions independently of NHA, has reviewed parts of our application that require legal review, such as sections on our planned approach to governance and to securing annual independent financial audits.

Appendix A4.1 provides the contract with NHA that will be operative if we receive a charter.

9. Is this application a conversion from a traditional public school or private school?

- Yes. Complete the Conversion Special Request Section.  
 No.

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

- Yes. Complete the Replication Special Request Section.  
 No.

Do you want your replication application to be considered for Fast-Track?

- Yes. Complete the Fast-Track Special Request Section.  
 No

11. Do you want your application to be considered for acceleration?

- Yes. Complete the Acceleration Special Request Section.  
 No.

12. Do you want your application to be considered for an Alternative Charter School?

- Yes. Complete the Alternative Charter School Special Request Section.  
 No.

13. Grade Levels Served and Total Student Enrollment

Projected School Opening Year: 2021 Month: August

14. Will this school operate on a year-round schedule?  Yes  No

15. Enrollment Summary. Complete the following table, graying out (or leaving blank) any rows for grades the school will not serve.

Number of Students						
Grade Level	Year 1 2021-2022	Year 2 2022-2023	Year 3 2023-2024	Year 4 2024-2025	Year 5 2025-2026	At Capacity 2024-2025
K	100	100	100	100	100	100
1	84	84	84	84	84	84
2	84	84	84	84	84	84
3	84	84	84	84	84	84
4	84	84	84	84	84	84
5	84	84	84	84	84	84
6		84	84	84	84	84
7			84	84	84	84
8				84	84	84
9						
10						
11						
12						
<b>Totals</b>	<b>520</b>	<b>604</b>	<b>688</b>	<b>772</b>	<b>772</b>	<b>772</b>

16. Complete the following table, providing projected enrollment for each of the following demographic groups.

Anticipated Racial/Ethnic Demographics (%)	% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Language Learners
Black: 43.8% Hispanic: 31.1% White: 19.1% Multiracial: 3.5% Asian: 2.2%	62.3%	12.75%	15.1%

17. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.

OGCA believes that our school model will be attractive to families in our growing area, where there are insufficient high-quality school choices and no charter schools within three miles. We intend to open to serve students in grades K-5 and will grow one grade each year until we serve students through eighth grade. This is the model that has been followed by many other NHA-partner schools with success and is the model that WFCAs used. As our area continues to grow, we do not believe there will be a lack of students to serve.

### Certify

18. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.  I certify  I do not certify

### Explanation (optional):

The OGCA Board has taken time to review and approve of this proposal. We understand that operational items, including processes, systems, and procedures explained throughout, are currently being utilized by other NHA-partner schools. We also understand that much of the language is similar to applications submitted during this and previous new school application rounds.

## Charter Application Special Requests

### Acceleration

Do you want your application to be considered for acceleration?

Yes. Answer questions A1-5.

**No. Stop. Do not complete this section.**

A. Per State Board of Education policy [CHTR-013](#), 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:

1. Demonstrate a clear and compelling need for the accelerated planning year.

Click or tap here to enter text.

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

Click or tap here to enter text.

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

Yes

No

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

Yes

No

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

Click or tap here to enter text.

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

B. 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 operated or currently operates a successful public charter school.

C. 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.

## Conversion

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

Yes. Go to Question #2.

**No. Stop. Do not complete this section.**

2. Is the Conversion Public or Private?  Public. Complete Question #3 below.

Private. Complete Questions #4 and 5 below.

3. Public Conversion Information

\*Give the name and six-digit identifier of the school being converted: [Click or tap here to enter text.](#)

If application is for a public conversion, submit Appendix A2.1: Public Conversion Evidences  
Conversion evidences must include:

- 1) Statement of Support signed by the majority of the teachers and instructional support personnel currently employed at the school
- 2) Last payroll outlining current staff receiving compensation from the traditional public school
- 3) Current school enrollment
- 4) Parent support of the conversion

4. Financial History

Outline the 3-year financial history of the proposed converted charter school in the chart below as evidenced in either financial statements or the IRS Form 990. Supporting documentation will be attached as Appendix A2.

<b>Financial History 3 Years Prior</b>	<b>Financial History 2 Years Prior</b>	<b>Financial History 1 Year Prior</b>

5. Private Conversion Information

Name of the private school being converted: [Click or tap here to enter text.](#)

City and state where private school is located: [Click or tap here to enter text.](#)

- 1) Describe the rationale for converting from a private entity to a public school. Include information regarding how the proposed charter school will be nonsectarian in nature and will be open for all students (not just those currently attending the private school).  
[Click or tap here to enter text.](#)
- 2) Provide a detailed description of the existing private school's financial status, including the process in which these financial assets or deficits will be transferred to the non-profit organization.

[Click or tap here to enter text.](#)

Provide a copy of the organization's IRS Form 990 for the last three years as Appendix A2.2 Private Conversion Evidences. If the current organization does not have a Form 990, tax information for the last three years along with financial statements must be included as Appendix A2.2 Private Conversion Evidences.

- 3) Depict and analyze the current enrollment trends and student demographics of the private school over the past three academic years.

Click or tap here to enter text.

- 4) Document and expound upon evidence that the existing private school is successful in student achievement. Base this explanation upon academic data available through state and national summative assessments.

Click or tap here to enter text.

- 5) Explain the process by which the current private school staff will be considered for teaching at the proposed charter school staff. What is the projected turnover due to the statutory requirements for teacher licensure and highly-qualified status?

Click or tap here to enter text.

## Replication

Per SBE policy [CHTR-016](#), the State Board of Education (SBE) may, in certain well-defined instances, grant permission for a non-profit corporation board of directors (board) to replicate either its own successful model, or to employ an educational management company (EMO) or a charter management organization (CMO) to replicate a successful model currently being operated under the management of the EMO or CMO. The SBE may also, in certain well-defined instances, grant permission for a non-profit corporation board to “fast track” such a replication by foregoing the planning year normally required for newly-approved charter applicants.

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

Yes. Go to Question #2.                       No. Do not complete this section.

2. If yes, please provide the name of the charter school and the state that the charter school has been authorized to operate in.

Wake Forest Charter Academy (North Carolina)

3. Are you a board of directors currently operating a charter school in NC and applying to replicate its currently existing model?

Yes. Answer questions #4-6.                       No. Go to Question #7.

4. A board of directors that currently operates a charter school in NC is eligible to apply to replicate its currently existing model only if the board’s current school or schools demonstrate a consistent record of academic, financial, and operational success. If the board operates more than one school, each school must meet this standard. To meet this standard, the board must meet each of the following conditions:

- A) Each school operated by the board must have academic outcomes at least comparable to those of the students enrolled in the LEAs in which they are located. In addition, each school operated by the board must meet or exceed student growth consistent with State standards, for three years immediately preceding the application, and maintain that growth throughout the application period.
- B) Each school operated by the board must have unqualified audits for the three years immediately preceding the application, and must maintain that fiscal standard throughout the application period.
- C) Each school operated by the board must have resolved any noncompliance issues cited by NCDPI during the three years immediately preceding the application and must maintain this standard throughout the application period.
- D) A majority of the board and 50% or greater of the board’s officers must be North Carolina residents.

Does your board meet the each of criteria listed above?                       Yes                       No

Attach as Appendix A3.1 Replication Educational Outcomes - for the replicated school for the last three academic years.

5. Describe which academic qualifications the non-profit board has met that qualify them for replication. [Click or tap here to enter text.](#)

6. Outline the 3-year financial history of the proposed replicated charter school in the chart listed below as evidenced in financial statements or IRS Form 990. Attach the related documents as Appendix A3.2 Replication Financial Evidences.

<b>Financial History 3 Years Prior</b>	<b>Financial History 2 Years Prior</b>	<b>Financial History 1 Year Prior</b>

7. Are you a board of directors that does not currently operate a school but is partnering to replicate an existing model operated by an EMO/CMO?

Yes. Answer questions #8-10 below.

No. Go to Question #11.

8. Eligibility Criteria

A) A board of directors partnering to replicate an existing model operated by an EMO/CMO must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina

1) have an academic proficiency comparable to the LEAs in which the current schools are located; or

2) meet or exceed growth for the three years immediately preceding the application at issue.

If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.

B) The board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO have unqualified audits without fiscal compliance issues for three years immediately preceding the application.

If the EMO/CMO does not currently manage any schools in NC or the schools in NC it manages do not yet have the data listed above, the board of directors must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The board of directors must maintain this standard through the application period.

Does the EMO/CMO partnering with the board meet the criteria listed above?  Yes

No

Attach as Appendix A3.1 Replication Educational Outcomes - for the replicated school for the last three academic years.

9. Describe which academic qualifications schools managed by the EMO/CMO have met that make them suitable for replication.

National Heritage Academies (NHA) has successfully partnered in the development of 13 North Carolina charter schools since 1999. For more details on these schools, please see Appendix A3.1. These NHA-partner schools deliver consistently better results than neighboring district schools. In 2017-18, 10 of NHA’s 11 partner schools met or exceeded growth and earned a ‘C’ or above on the state’s accountability system (two new schools opened in 2018 and do not yet have academic data available).

Our school plans to serve a student population very similar to Research Triangle Charter Academy (RTCA), another NHA-partner school in Durham that opened in 2000. This school did not meet growth in 2017-18, after meeting growth for the prior two years, and therefore we are planning to replicate WFCFA, a school that opened in 2014 in partnership with NHA and has met or exceeded growth for the past three years, while outperforming the schools students would otherwise attend. Please see Appendix A3.1 for further evidence of WFCFA’s strong academic, organizational, and financial performance. We also plan to learn from RTCA and to ensure that we build strong relationships with our sister school in Durham, while providing consistently strong academic results.

10. Outline the 3-year financial history of the proposed replicated charter school in the chart listed below as evidenced in financial statements or IRS Form 990. Attach the related documents as Appendix A3.2 Replication Financial Evidences.

<b>Financial History 3 Years Prior</b>	<b>Financial History 2 Years Prior</b>	<b>Financial History 1 Year Prior</b>
\$19,717	\$23,514	\$23,727

**11. Fast Track Replication**

Do you want your application to be considered for Fast-Track Replication?

- Yes. Complete the Fast Track Eligibility Criteria below.
- No. You have completed the Replication Special Request section. Please attach the required appendices **3.1 Education Outcomes** for the replicated school(s) for the last three academic years, and **3.2 Replication Financial Evidences IRS Form 990**, bank statements for the replicated school(s) for the prior three years.

**Fast Track Replication Eligibility Criteria**

Per State Board of Education policy [CHTR-016](#), a non-profit corporation board that does not currently operate a charter school in NC is eligible to apply to replicate through fast-track replication an existing model operated by an EMO/CMO. The non-profit corporation board is eligible to apply only if the schools operated by the EMO/CMO have a consistent track record of academic, financial, and operational success. The non-profit corporation is eligible to replicate an existing model operated by the EMO/CMO only if the non-profit corporation board meets each of the following conditions:

1. The non-profit corporation board must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina (1) have an academic proficiency comparable to the LEAs in which the current schools are located; or (2) meet or exceed growth for the three years immediately preceding the application at issue. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.

The non-profit corporation board meets at least one of the qualifications above. Yes No

\*Attach as Appendix A3.1 Replication Educational Outcomes - for the replicated school for the last three academic years. Describe which academic qualifications the non-profit board has met that qualify them for replication.

2. The non-profit corporation board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO have unqualified audits without fiscal compliance issues for three years immediately preceding the application. If the EMO/CMO does not currently manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The non-profit corporation board must maintain this standard through the application period.

The non-profit corporation board meets at least one of the qualifications above. Yes No

3. Each school operated by the non-profit corporation must have resolved any noncompliance issues cited by NCDPI during the three years immediately preceding the application and must maintain this standard throughout the application period.

The non-profit corporation board meets at least one of the qualifications above. Yes No

4. A majority of the non-profit corporation board members and 50% or greater of the board officers must be North Carolina residents.

The non-profit corporation board meets at least one of the qualifications above. Yes No

## Alternative

Do you want your application to be considered for an Alternative Charter School?

- Yes. Continue to the next section.  
 **No. Stop. Do not complete this section.**

In order to qualify for designation as an “alternative school” for purposes of accountability under this policy (CHTR-020), 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 [DROP-001.I.B.](#), and must also meet one or more of the following:
  - 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 (linked above); or be imminently at risk of dropping out as demonstrated by adequate documentation in the charter school’s application for designation under this policy.

Does your proposed school meet the minimum criteria?

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 the 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 student 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 [ACCT-038](#). The option selected, if approved, cannot be changed except at the time of renewal (as outlined in [CHTR-020.III](#)).

### Proposed Management Organization (EMO or CMO)

1. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization”?

Yes       No. **Stop do not complete this section.**

2. Name of the Company: National Heritage Academies, Inc. (NHA)

Mailing Address: 3850 Broadmoor Ave SE

City/State/Zip: Grand Rapids, MI 49512

Phone Number: 616-464-3648 / 616-285-1588

Contact Person: Megan DeKraker / Jeff Ichesco

Email Address: [mdekraker@nhaschools.com](mailto:mdekraker@nhaschools.com) / [jichesco@nhaschools.com](mailto:jichesco@nhaschools.com)

Website: <http://www.nhaschools.com>

3. Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school.

NHA has a documented record of success spanning nearly 25 years. It currently partners with 88 schools, across nine different states, serving over 60,000 students (with nearly 20,000 more on waiting lists). This includes serving over 9,100 students across 13 partner schools in North Carolina (with over 7,000 more on waiting lists). In North Carolina, schools have replicated the success of a partnership with NHA, producing strong outcomes for students. Our partnership will provide us with a facility and comprehensive educational program including curriculum, staffing, professional development, and more.

Best educational interest: Partner schools working with NHA have yielded strong academic records and successful partnerships. Consider the following:

- No partner board has ever terminated its Services Agreement with NHA.
- Four NHA-partner schools in North Carolina going through renewal in recent years received 10-year renewals, evidencing strong success with the NHA model.
- Since 1995, all NHA-partner schools up for renewal were successfully renewed by their authorizer, with the exception of Rochester Leadership Academy Charter School (Rochester, NY), which was not renewed in 2005 for not meeting the goals outlined in its charter contract.

Best financial interest: NHA has pledged significant and direct investments in OGCA, and we are excited about what that means for families in our area.

- In accordance with our Services Agreement, NHA pledges to fund and deliver the educational program our school requires even if public revenues fall short of the budget we approve. NHA assumes all financial risk, and our Board is guaranteed the ability to provide families with our planned academic program.
- NHA typically leverages millions of dollars in private capital to create a new or renovated facility, investing in communities at no cost to taxpayers.

Attach Appendix A4.1: Executed Management Contract

4. What other EMO/CMOs were pursued and why did the applicant select this one? Please include information regarding other management organizations' fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.

We intend to enact our mission and vision through a new K-8 school that will be governed locally in partnership with National Heritage Academies (NHA), a respected charter school operator. Our model will feature accountability-focused Board oversight of academics, operations, and finances that are a part of the NHA model and described throughout this application. NHA will not only provide us with a suitable school facility, it has a documented track record of successfully serving all student groups. Nationwide, nearly 70 percent of students in NHA-partner schools qualify for free or reduced-price lunch, 75 percent are demographically minority students, nearly 10 percent are English Learners, and approximately 10 percent are Exceptional Children. This composition somewhat mirrors the student population of Durham Public Schools.

We chose NHA because we were impressed with the successful opening of 13 partner-schools in North Carolina and specifically, the academic success of WFCA. For over 25 years, NHA has delivered state-of-the-art facilities with the staff, systems, and resources for student success. We look forward to developing and operating a new school through NHA's partnership model.

NHA covers all start-up costs associated with designing, building, and/or renovating a school tailored for NHA's academic model. It also covers costs of launching the academic program, and it often contributes its own funds for supplemental instruction. Under this model, which relieves boards of a burden that crushes many charter school projects, NHA leases the building to partner boards in predictable leases. The leases, which are negotiated with boards, impose no automatic rent increases and reflect appropriate value of these one-purpose buildings.

5. Provide and discuss student performance, governance performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what are the highest and lowest performing schools of the EMO/CMO? Why are these two schools so different in overall achievement?

Nationally, NHA-partner schools produce laudable student success: the most recent comparable state data (2017-18) shows that nearly 75 percent of NHA-partner schools outperform the local district. In both our state and nationwide, NHA and partner boards produce tremendous compliance rates, return consistently clean audits, and implement prudent governance practices.

In North Carolina, NHA partners with 13 schools. In 2017-18, four of 11 operating schools exceeded growth and six met growth. RTCA did not meet growth. Overall, NHA-partner schools made gains in every subject against their local district, comparison schools, and the state. Additional highlights are below.

- Greensboro Academy has regularly achieved high levels of academic success. For the fourth year in a row, Greensboro had a letter grade of at least "A."
- Peak Charter Academy, Queen's Grant Community School, Summerfield Charter Academy, and WFCA all received "B" letter grades and exceeded or met growth.

- PreEminent Charter School serves an at-risk student population. In 2017-18, the school exceeded growth and improved to a “C” letter grade.
- Two other schools, Johnston Charter Academy and Rolesville Charter Academy, opened in August of 2018 and data is not yet available.

Highest and lowest NHA-partner schools: On the fall 2018 NWEA math and reading assessment, 88 percent of students were at or above grade level at Greensboro Academy (NC). At Orion Academy (OH), 13 percent of students were at or above grade level. The difference can be attributed to student demographics (7 percent vs. 97 percent free or reduced-price lunch, respectively) and the proficiency rate of incoming students (78 percent vs. 8 percent, respectively). In both cases, NHA is focused on academic growth for all students.

Stanford University’s Center for Research on Education Outcomes (CREDO) has found NHA’s success to be significant. Research from a recent study found that on average students grow their academic performance each year they are enrolled in an NHA-partner school. This results in the equivalent of 80 additional days of learning each year in math and an additional 63 days in reading. CREDO has long researched academic outcomes, and in this study examined nearly 3.7 million individual student records. These records span 63,616 traditional public schools and 5,715 charter schools across 24 states (as well as New York City and Washington, D.C.). This study also includes 286 charter school networks (such as NHA). NHA was found to be within the top 20 percent of all schools surveyed, landing in the 84th percentile. CREDO’s research shows that NHA outperforms over four-fifths of the other charter school networks studied. Overall, CREDO’s work showed students enrolled in NHA-partner schools gain a composite 71 additional days of learning over the course of a school year.

6. Describe how the governance structure will be affected, if at all, by the EMO/CMO, and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.

The OGCA Board will receive the charter for our school. In turn, it is up to us to reach the goals we set forth for the school community. This involves overseeing the academics, operations, and finances with fidelity. Our Board will delegate the local operation to NHA, and we will hold them accountable for outcomes across our school.

We will be independent from NHA. This is evidenced within the Services and Lease Agreements we will hold with the organization. We have also engaged independent legal counsel and are in the process of contracting with an independent auditor to examine our finances. We may also prioritize an independent review of our management partner.

The Lease Agreement we will execute with NHA (separate from our Services Agreement), ensures us continuity in the unlikely event we separate from NHA. Our agreement states we can stay in the school facility for at least one additional school year upon termination (Appendix A4.1). Under this arrangement we are not beholden to NHA for the ongoing operation of OGCA.

Our school will develop an annual School Improvement Plan (SIP) with an extensive review of the academic and operational aspects of OGCA serving as its basis. Our SIP will include

improvement actions for areas of need. Beyond serving as a call to action for our school's needs, the SIP is an additional accountability measure for our Board of NHA's performance.

Our Board holds NHA accountable, and together in partnership, will oversee our principal. Our school leader will oversee our grade-level deans and administrative staff. Our Board will be responsible for the hiring and termination of teaching staff.

7. Provide a description of the relationship that will exist between the charter school employees and the Management Organization.

Our Services Agreement with NHA explicitly states the relationship between school employees and NHA (Article VIII of the Agreement, included as Appendix A4.1). Our school's teachers will be jointly employed by our Board and NHA. Our principal and grade-level deans will be solely employed by NHA. Our independent legal counsel has reviewed this arrangement, and has found it to be beneficial for our students and families. We will be closely aligned with NHA to ensure we have the right staff for our school to achieve our mission and vision.

Our Services Agreement indicates NHA is responsible for recruiting, screening, and hiring successful teaching candidates to recommend to our principal and Board for review (and ultimately for employment). Our Board will have the authority to disagree with our principal, allowing NHA and the principal sufficient time and support to solve any pointed issues. Should we not see results of these efforts, our Board can direct NHA to terminate that principal.

NHA's comprehensive benefits package, competitive salary structure, and quality retirement plan will serve to attract excellent educators. Additionally, our school will benefit from NHA's substantial and professional teacher recruitment efforts and its 88-school network to find the right staff for our school. Our Board will plan to visit other NHA-partner schools in the area, and potentially spend time speaking with Board members of those schools.

8. Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles.

By delegating the daily local operations of our school to NHA, we make NHA responsible to assist us in reaching our goals, as well as our mission and vision. NHA is contractually obligated to ensure our school is in good standing with regards to the compliance of our charter. NHA is responsible for helping us achieve our goals, mission, and vision.

We will annually hold NHA accountable for the academic, operational, and financial results of OGCA. This includes the following:

- Academic growth, proficiency, and achievement goals (outlined in the "Goals" section of this application).
- Operational target goals, including on student attendance (at least 95 percent), parent satisfaction (90 percent or higher with at least 50 percent of parents responding to the satisfaction survey), and fiscal soundness (an unqualified audit annually).

- NHA will be required to work with school leaders to perform a comprehensive annual review of the school's education program, developing a formal, action-specific School Improvement Plan provided to our Board for review, input, and approval.
- The Board will conduct a formal performance review of NHA.

We hold the autonomy and ability to separate from NHA and terminate our agreement, with or without cause, with 90 days' written notice. We also may terminate the agreement if NHA fails to remedy a material breach within 30 days. If we terminate, our Lease Agreement allows us to remain in the school facility for the rest of the school year. In any termination, per-pupil funding will continue to flow to our school and the Board can finance operations.

9. Is the facility provided by the EMO/CMO?  Yes  No

Attach Appendix A4.2 Facility Buyout Agreement, if applicable

10. List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.

In 2018-19, 13 charter schools in North Carolina partnered with NHA through agreements similar to the one we propose. They maintained positive fund balances throughout the past three fiscal years (2018-19, 2017-18, 2016-17):

- Forsyth Academy (\$7,252, \$16,593, and \$19,531)
- Gate City Charter Academy (\$12,441, \$19,881; opened in 2016-17)
- Greensboro Academy (\$45,444, \$43,637, and \$42,176)
- Johnston Charter Academy (opened in 2018-19)
- Matthews Charter Academy (\$27,729, \$33,869; opened in 2016-17)
- Peak Charter Academy (\$12,726; opened in 2017-18)
- PreEminent Charter School (\$60,420, \$61,500, and \$50,089)
- Queen's Grant Community School (\$652,424, \$886,294, and \$1,208,077)
- Research Triangle Charter Academy (\$25,836, \$15,664, and \$18,360)
- Rolesville Charter Academy (opened in 2018-19)
- Summerfield Charter Academy (\$36,524, \$50,105, and \$38,692)
- Wake Forest Charter Academy (\$19,717, \$23,514, and \$23,727)
- Winterville Charter Academy (\$24,901, \$25,173, and \$47,751)

The school audits for 2018-19 are not final, and figures provided are not yet audited. Each school's Board directs the use of up to \$35,000 per year included in its budget. Each Board directs the expenditure of discretionary funds for educational and/or extracurricular expenses outside of the model educational and operational program. Boards may also set aside these funds in reserve for future consideration and determination. A significant benefit of OGCA's agreement with NHA is the organization's dedication to providing up-front and ongoing investment to make certain a school opens successfully. This includes contributions ensuring the educational program is implemented as soon as a school opens, and pledging to contribute additional financial support. NHA assumes the obligation for a school's expenses, meaning it is responsible for all the financial risk and will cover a shortfall if expenses exceed revenues.

Attach Appendix A4.3: EMO/CMO Financial History

Provide as Appendix A4.3 the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good standing by providing bank statements from the prior three years.

Attach Appendix A4.4: IRS Form 990

Provide as Appendix A4.4 the IRS Form 990 (or equivalent documents if the organization does not file a 990) for the prior three years.

## Section 1 Mission, Purposes, and Goals

**1.1 Mission and Vision.** State the mission and vision of the proposed charter school. The mission statement defines the organization’s purpose and primary objectives, describing why it exists. The mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree. The vision statement outlines how the school will operate and what it will achieve in the long term. The vision statement should describe what the school will look like when it is achieving its mission. The mission and vision statement provide the foundation for the entire proposal.

The mission and vision statements, taken together, should:

- Identify the students and community to be served;
- Illustrate what success will look like; and
- Align with the purposes of the NC Charter School Law.

1. The mission statement of the proposed charter school is as follows (35 words or less):  
Oak Grove Charter Academy exists to prepare students with the academic skills and character traits necessary for success in college, careers, and life.

2. What is the vision of the proposed school? What will the school look like when it is achieving the mission?

We will create a school for families in and around Gorman that meets the needs of students with a research-based, rigorous academic program and develops students’ personal character through a moral focus curriculum to promote good citizenship.

### Educational Need and Targeted Student Population of the Proposed Charter School

3. 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. Additionally, how it will reflect the socioeconomic status of the LEA, SWD population, and ELL population of the district?  
[See G.S. 115C-218.45\(e\).](#)

We are proposing to initially serve grades K-5, eventually growing to eighth grade with a full school of 772 students. Our Board has decided to enter into an agreement with National Heritage Academies to partner with us in achieving our mission, vision, and goals. Overall, NHA partners with 88 different schools in nine states with 13 schools located in North Carolina.

OGCA will not have a target student population. It is our intention to serve students from all backgrounds, and we anticipate receiving interest from students in both northeast Durham and Granville Counties. We will partner with NHA to intentionally focus our marketing and outreach both within these areas and broadly across the area.

Our belief is we will likely serve a student population that is similar to the overall enrollment of Durham Public Schools (DPS). Student demographics in the district include the following:

- Black: 43.8%
- Hispanic: 31.1%

- White: 19.1%
- Multiracial: 3.5%
- Asian: 2.2%

Over 62 percent of students within DPS qualify for free and reduced-price lunch (FRL), 15.1 percent are English Learners (EL), and 12.75 percent are Exceptional Children (EC).

4. What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?

U.S. Census data shows Durham County's population rose 17.3 percent from 2010-2018 and the Durham-Chapel Hill area is the state's fourth-fastest-growing metro area. With 20.8 percent of residents under the age of 18, Durham has a large population of school-aged children. Our school would provide a kindergarten through eighth grade option for Durham families who live in the eastern part of the county and other surrounding areas. Academic performance of DPS is below the state average and in 2017-18, more than 84 percent of schools received a 2017-18 performance grade of 'C' or lower.

DPS serves all of Durham County. DPS schools serve some 32,446 students in 53 schools, of whom 43.8 percent are Black, 31.1 percent are Hispanic, 19.1 percent are White, 3.5 percent are multiracial, and 2.2 percent are Asian. Among all public-school students in the county, nearly two-thirds (62.3 percent) are eligible for free or reduced-price lunch (FRL).

In Gorman, families would benefit from additional choices. Glenn Elementary School, located in Durham, received a 2017-18 performance grade of 'D'. Glenn Elementary met growth in 2017-18, but did not do so the two years prior. Just outside of Gorman, Merrick-Moore Elementary School received a performance grade of 'D' for the second consecutive year.

Our educational model will follow the NHA program as we plan to contract with NHA for the day-to-day operations of our school. We believe that NHA's commitment to personalized instruction and systematic intervention, described in Section 2.2, will serve our target student population well. We anticipate that many students may be below grade-level proficiency and will need our help to close achievement gaps to meet our mission and vision.

5. 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 in grades 9-12).

OGCA will implement the structure in place at other NHA-partner schools. In 2021-22, we will serve students in grades K-5 (520 students in total). Our school will then grow by one grade over the following three years until we reach eighth grade (772 students in total). NHA's commitment to us includes delivering the resources for the entire academic program even though we will not open with all grades. This includes having the full leadership team in place when our school opens, as well as a facility that is ready to serve students through eighth grade on our first day.

This advantage affords us the benefit to place an emphasis on quickly and efficiently implementing practices, procedures, and programs.

It is anticipated that the majority of our students will reside within the Durham Public Schools district, with a smaller number commuting from Granville County Public Schools. We have built our budget based on this forecast, but will make modifications if they prove necessary.

Comparison to Durham Public Schools: There were more than 33,000 students enrolled in DPS during the 2018-19 school year. Our school's 772 students at capacity will represent roughly 2.3 percent of the LEA. Further, our starting enrollment of 520 represents the same percentage of the district's K-8 enrollment.

6. Summarize what the proposed school will do differently than the schools that are now serving the targeted population. What will make this school unique and more effective than the currently available public-school options?

Our school will replicate the NHA model in place at other schools who partner with the organization. This includes utilizing NHA's four pillars (*academic excellence, student responsibility, parental partnerships, and moral focus*). Other dynamic components of OGCA will distinguish us from other nearby schools.

Distributed leadership: We will implement NHA's distributed leadership model. In this school environment, deans oversee teams of grade-level staff (ex: K-2, 3-5, 6-8). They serve as the direct managers of classroom teachers, allowing for weekly coaching to drive successful instruction. Our leadership team will be comprised of one principal and grade-level deans.

Moral focus: We will implement a moral focus program to teach and model high expectations, responsibility, and positive behaviors through a curriculum built on virtues such as perseverance, compassion, integrity, and courage. Lessons will have strong character development and the qualities imperative to become good citizens. Our students will learn that their best effort is important to academic success; consequently, teachers will ensure students know what is expected of them.

K-8 grade configuration: OGCA will serve students in kindergarten through eighth grade allowing students to avoid making transitions to different schools. This has proven successful in other NHA-partner schools. There are no district schools in Gorman offering this structure.

Parental partnerships: Relationships with parents and guardians will be of the utmost importance at OGCA. To do so, we will actively engage them in their students' learning, provide frequent and meaningful communication, and offer a welcoming environment that includes a dedicated area specifically for parents and guardians to interact with school staff.

School-wide framework: Our partnership with NHA provides us decades of experience producing a clear framework designed to foster outstanding academic outcomes. Our school leader will be charged with faithfully and consistently implementing these five specific values.

- *Establish a professional culture of excellence:* The principal will lead a community that is motivated to achieve high expectations and that exhibits high care for all members of the community.
- *Systematize collaborative improvement:* Deans, teachers, other instructional professionals, and all staff will work in collaborative data-driven teams, seeking improved student learning through the shared study and implementation of instructional best practice.
- *Lead instructional excellence:* Deans will have focused instructional coaching as the top priority, to ensure high-quality learning for every student in every classroom every day.
- *Implement systematic intervention:* OGCA will identify the needs of academically at-risk students, exceptional children, English Learners, and students with behavioral challenges, as well as provide tailored instruction and systematically monitor student progress.
- *Cultivate meaningful parent partnerships:* Parents and school staff will authentically connect to understand and support each other in a caring and meaningful way, working in partnership to help every child achieve college readiness.

Classroom framework: To complement the school-wide framework, NHA has developed a classroom framework of four key instructional competencies that we believe will improve academic results for individual students and our school.

- *Classroom culture:* Teachers will strive to lead self-managing classrooms by building positive relationships, sustaining classroom routines and procedures, and holding students accountable to clear behavioral expectations.
- *Planning:* Teachers will plan instruction by identifying and analyzing standards to be taught throughout the year, aligning instructional resources and activities to those standards, and preplanning differentiated opportunities to meet student learning needs.
- *Teaching:* Teachers will deliver content at a level of rigor that challenges students, cognitively engages them, uses all time for learning, and personalizes instruction.
- *Assessing:* Teachers will implement assessment strategies to understand student learning needs, provide actionable feedback, and guide instructional decisions.

7. Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities and summarize their results.

OGCA will be a welcomed addition to the Gorman area as forecasted growth and nearby school performance shows the need for additional school choices. This was evidenced in a recent July 2019 survey (see Appendix A) that concluded the following:

- Forty-six percent of respondents indicated they would be likely to enroll their student in a school like ours.
- Half of those surveyed requested to be contacted with further information if a school like ours opens in the community.

Beyond our positive survey results, we see the demand for schools partnering with NHA. Our sister school, RTCA, currently maintains a wait list of over 200 students. WFCA, the school we are proposing to replicate, has more than 1,400 students on their wait list.

We have described the emphasis on parental partnerships for OGCA, and we have studied what parents are saying about other NHA-partner schools. Eighty-seven percent of parents at RTCA are satisfied with the school, and nearly 85 percent would recommend the school to others. OGCA will benefit from maintaining a strong relationship with these schools. We will be able to share ideas, work through experiences, and brainstorm on decision making opportunities in order to stay on track toward meeting our goals, mission, and vision.

Attach Appendix A: Evidence of Community/Parent Support. Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school. 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).

## 1.2 Purposes of the Proposed Charter School

The Six Legislative Purposes of a Charter School are:

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

1. In one page or less, describe how the proposed charter school will achieve one or more of the six legislative purposes, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations.

Oak Grove will address North Carolina's legislative purposes for charter schools in several ways.

Professional opportunities for teachers: Oak Grove will offer administrators and teachers training and PD to help them succeed in their current roles and develop credentials for advancement. For example, PD, training, and ongoing gives teachers opportunities to earn more responsibility as teacher leaders, mentors, and deans. NHA also offers some deans PD to help them earn promotions to principal positions. New and future principals receive leadership training throughout the year. (See section 3 for details.) The foundation of opportunity is compensation that is broad and deep, with competitive salaries, merit pay, benefits, and pension options.

School accountability: We will hold everyone – the Board, administrators, teachers, and students – accountable for academic outcomes. We will follow the state accountability model, so students will take state assessments, and those test scores will be the basis of our self-evaluation. We will also use formative assessments to help assess the progress and learning needs of individual students, classes, and the school. A baseline assessment early in the school year will also help inform our instruction and support our students' academic growth. Finally, the Board will also

require NHA to measure outcomes on such operational factors as parent satisfaction, school finances, and attendance. To sustain our focus on these metrics, the Oak Grove Board will create an annual school improvement plan that reviews this data and plans new steps for the next year.

Expanded educational choice: Durham County has relatively few K-8 schools: nine charter schools and one district school. Our school will be just the 11th with this model. Gerald McNair, our lead applicant, also serves on the Board of RTCA, and our new school will benefit from this experience. Finally, we note that OGCA's planned Moral Focus curriculum will help students strengthen their characters and, this, enhance their preparation for success later in life.

Improved learning: NHA's success in North Carolina makes us confident about learning gains:

- Greensboro Academy earned the highest state accountability rating in the last four years.
- WFCA, which we are replicating, has met or exceeded expected growth for three years.
- In 2017-18, 10 of 11 NHA-partner schools with state assessment results met or exceeded growth. That year, nine of these schools outperformed the local district in reading, and six reached that achievement in mathematics.
- Four NHA-partner schools have recently earned full 10-year renewals.

Increased learning opportunities: OGCA will pursue an innovation-friendly culture to help meet all students' needs and prepare them for college and career. We will emphasize blended learning, small-group learning, and online learning tools and results from aligned assessments will help personalize instruction and maximize flexibility for teaching and learning.

Instructional innovation: Our teachers will receive ongoing PD, weekly coaching, scheduled planning time with their peers, and benefits of a professional learning community – all to facilitate design and implementation of creative new variations on recognized best practices.

### 1.3 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 will be steadfast in our commitment to monitoring student learning, striving for excellence, and holding our school staff and NHA accountable in the pursuit of our goals. Our goals will be similar to the successful goals in place at other schools partnering with NHA both in North Carolina and across the country. We believe it is to our advantage to adopt them as well.

We propose the following academic goals for our first five years of operation:

- Students in kindergarten and first grade will score at/above the 65th percentile in both reading and math, as measured by start-of-year to end-of-year learning growth on a nationally normed standardized assessment.
- By the end of the initial charter term, OGCA students will exceed the average performance of local district students by at least five percent on state assessments.

- Students returning to our school after seventh grade will successfully finish Math I (formerly Algebra I) by the end of eighth grade, and will also earn a passing rate of 75 percent on the Math I end-of-course exam.
- OGCA will annually, at a minimum, “Meet Expected Growth.” We intend to exceed the state standards of expected progress by the end of the initial charter term.

We intend for our goals to be a gauge of how our school is performing. Our aim is to meet our goals, but we will not be satisfied with doing so. Our Board will adjust accordingly during our annual school improvement planning to spur ongoing growth.

The North Carolina Department of Public Instruction (NCDPI) requires administration of a national assessment of college readiness to every eighth-grade student. Our school will do so and collect and analyze the results to create a tailored plan for each student to succeed in high school, college, and beyond.

We expect our school to achieve operational goals as well. These include:

- Each year, the school will average a student attendance rate at or above 93 percent.
- Each year, the school will have an overall parent satisfaction rate of 80 percent, with at least 50 percent of parents responding to our survey.
- Each year, our Board of Directors will review the performance of, and provide feedback to, our education management partner. This will allow the Board of Directors to identify the management partner’s successes and opportunities to improve its future performance, as well as ensure that the Board and management partner’s relationship is effectively serving the school.
- Each year, the school will receive an unqualified audit.

Our Board will receive status update reports on OGCA’s progress toward goals at each monthly meeting. We will be provided with detailed information regarding sections of each goal that include the performance of subgroups within our student population (EL, new students, FRL, EC, etc.). Families will receive ongoing periodic informational newsletters and updates that include the school’s current progress and standing.

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

Our actions as a Board will be based upon the mission we have created. Our mission will be at the center and forefront of all academic, operational, and financial discussions and components of OGCA. Four key questions will guide our discussions:

- Are our students on track to attain OGCA’s mission and charter goals?
- Are parents embodying our commitment to parental partnerships?
- Are we being strong stewards of school funds?
- Do we comply with state and federal laws, rules, and requirements?

We will look to enrollment as an early indicator of success at OGCA. We believe we will receive more interest in our school than the number of seats we propose. This may result in a wait list once our school opens, will confirm that families in our community want more school choice.

Our principal and NHA will provide our Board with monthly reports visualizing the progress OGCA is making against our mission and charter goals. Reports will provide insights regarding benchmarks and documented trends toward our overarching and mission-specific goals. We will discuss any hurdles to meeting each objective and work collaboratively to identify ideas and solutions to address challenges. Among other aspects, our reports will include the following:

- Growth in student learning.
- Absolute and comparative student performance on internal diagnostic and interim measures.
- Status on applicable federal and state accountability systems.
- Data regarding our student population (demographics, FRL, EL, and EC counts) and performance achievement levels broken out by subgroups.
- Status on college-readiness.
- Parent satisfaction.

Our Board will also review operational data, including on enrollment, attrition, attendance, discipline, and more. School leadership and our Board will regularly discuss the school culture, professional development and its impact, attendance and enrollment trends, the level of parent and community involvement, internal academic measures, rewarding staff performance, and any employee complaints or issues. Staff and parents must also be informed of the school's standing with regard to each of our performance goals. For goals that have a single measurement point, we expect to inform the community on an annual basis. We also intend to analyze trends, including attendance rates, to forecast our projected annual results. We will report to our community regularly on our performance, as required by state and federal laws.

On an ongoing basis we will review how OGCA is operating, teachers are delivering instruction, and students are learning. Requiring these regular reports and updates, our Board will work with NHA to provide the appropriate resources to ensure we do not fall short in a particular area.

Our Board will embrace the online and in-person trainings available on a wide array of topics that may be helpful in governing OGCA through the NCDPI Office of Charter Schools. Further training will be sought from organizations including the North Carolina Association for Public Charter Schools and the National Association for Public Charter Schools.

We may also contract for an independent evaluation of NHA's performance to make certain we are meeting all requirements of our charter and that we are satisfied with OGCA's performance.

## Section 2 Education Plan

### 2.1 Instructional Program

1. 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.

Our school will be designed in partnership with NHA, and our instructional program will be based upon four foundational pillars: *academic excellence*, *student responsibility*, *parental partnerships*, and *moral focus*. We intend for OGCA to provide an instructional program that is data-driven, research-based, and aligned to all state standards in order to prepare students for high school, college, and the lives that await them. We will ensure that our instructional program is furthering the legislative purposes of charter schools at all times.

#### Schoolwide Instructional Methods

Our instructional program and school culture will also come to life through NHA's organizational frameworks, which we will implement for our school and for each classroom.

School-wide framework: Our principal will be charged with faithfully and consistently implementing these values to drive student learning. There will be five specific elements to the school-wide framework at OGCA (See Section 1.1 for full details on these elements).

Classroom framework: To complement the school-wide framework, NHA has developed a classroom framework of four key instructional competencies (See Section 1.1 for more details) that we believe will improve academic results for individual students and our school community.

#### Meeting the Needs of Target Student Population

Our commitment to data-driven instruction will enable us to continuously evaluate and refine the instructional methods we choose and to differentiate instruction in culturally responsive ways to meet specific learning needs of individual students. Our community of educators will hold regular data meetings at which deans will lead a review of results from previous assessments. These work sessions will help teachers use data to modify instructional plans and personalize instruction. OGCA will complement these efforts with robust professional development for teachers to ensure that they have the skills and knowledge to analyze assessment data and use insights from that data to refine lesson planning and instructional tactics.

Teachers will also implement strategies that help students take responsibility for their learning. Teachers will help students set individualized goals, and then will use these goals as an instructional tool. In this way, both students and teachers embrace a clear understanding of the desired focus skill, and teachers are empowered to articulate what they are teaching while allowing students to describe what they are learning and to work at the appropriate level of difficulty (see R.J. Marzano, *Designing & Teaching Learning Goals & Objectives*, 2009).

Rigor: Content will be taught at an appropriate level of rigor that cognitively engages students, intentionally uses all time for learning, personalizes instruction, and ultimately challenges students to drive their own learning. This will build student responsibility while providing instruction that is engaging to each student. This includes:

- *Instructional rigor*: Teachers will communicate measurable learning goals and deliver challenging content for each student and gives them opportunities to engage in higher-order thinking processes to interact with the content in a deep and meaningful way.
- *Cognitive engagement*: Teachers will use effective instructional strategies to cognitively engage students; creating student ownership for their learning.
- *Use of time*: Teachers will demonstrate urgency for learning by pacing lesson delivery and activities in a way that maximizes the use of time and creates a balance between instruction and opportunities for student processing.
- *Personalized instruction*: Teachers will use preplanned corrections and extensions in whole-group, small-group, and individualized settings, to meet learning needs.

Teachers will build upon students' prior knowledge, challenging them beyond what they have encountered before. Research has shown that students demonstrate increased motivation, responsiveness, and engagement in class through their writing, discussions, and reading when they are cognitively engaged with higher-order questioning, varied instructional strategies, and integrated technology-driven learning tools. Pacing of content and instruction will be a key instructional focus to maximize time and create the urgency necessary for optimal learning.

We will also use alternative teaching models, such co-teaching for exceptional children and will integrate this into our classroom framework as dictated by the needs of our students.

Personalized instruction: OGCA will use small-group and blended learning to personalize instruction. We expect students to enroll at OGCA with significantly different needs. To meet each student at their instructional level, we will use small-group instruction regularly.

OGCA will focus on small-group instruction and effective learning strategies, including ways to effectively facilitate and pace student-driven instruction. Currently, it is anticipated that most lessons will begin with a small block of direct instruction, and then students will transition to small-group settings. The plan is to equip each classroom with approximately 10 Chromebook devices and leverage software platforms such as i-Ready. Teachers will also establish opportunities for collaborative and inquiry-based learning to deepen students' understanding of various topics. Independent work will be assigned as appropriate, so students can practice applying previously learned concepts and, in the process, develop higher-order thinking skills.

Blended learning: To customize learning, we may use online learning tools to create a blended learning environment. Small-group and blended learning approaches enhance flexibility on the time, pace, and place students learn. At first glance it may seem like students are simply completing lessons at the computer – but programs like i-Ready gather valuable information and transmit it to teachers. With this wealth of information available in real time, teachers can more effectively customize learning to each child's needs. The benefits of blended learning will be to:

- Ensure that each student's education is specific for his or her needs. Blended learning helps to pinpoint where each student is on his or her educational path. Our teachers will create appropriate challenges based on each child's unique ability. For instance, if a student is exceptionally strong in language skills but weaker in math, a teacher can craft greater opportunities to move beyond the average grade level of material for English, while simultaneously providing remediation to improve math skills. This model varies for each student, making teaching and learning highly fluid and individualized.
- Encourage greater classroom collaboration. In traditional learning, student collaboration happens only in face-to-face interactions. Blended learning adds secure online group work, online discussions, email, instant messages, blogs, and electronic portfolios.
- Allow students to create live presentations, labs, performances, and exhibits of skill through models, works of art, and posters. Teachers will also have more capacity for disseminating information and testing by incorporating online surveys and quizzes, assignments that include slideshows, photographs, and videos.

### Curriculum and Instructional Design

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

In addition to our school-wide framework (discussed previously in sections one and two), our school intends to implement the classroom framework of instructional competencies (See Section 1.1 for more details) developed by NHA to increase student learning.

To guide the implementation of the school-wide and classroom frameworks, our staff will have access to an interactive web-based student information system that provides real time updates on attendance, behavior, mastery of learning objectives, and more. This innovative approach allows staff a clear roadmap for effective instruction and provides opportunities for feedback to teachers through specific actions and indicators.

Learning environment and structure: Personalized instruction will be a focus at our school. We will use online learning tools to create a blended learning environment. We believe that interlacing media together with other methods of instruction makes student learning more powerful. Each classroom teacher will be effectively trained and frequently coached to employ a variety of instructional approaches (including modeling, think-alouds, etc.), and to use differentiated instruction as appropriate. Teachers will establish opportunities for collaborative and inquiry-based learning to deepen students' understanding of various topics. Independent work also will be assigned as practice for applying previously learned concepts and to promote the development of higher-order thinking skills. Importantly, small-group settings also will be created to ensure students are engaged with the standards at their current level of learning. This approach will ensure each student's education is specific to his or her needs.

Personalized instruction: We plan to have small blocks of direct instruction. In order to meet each student at their individual learning level and to make the most effective use of our resources, we intend to leverage technology during small group instruction. It is our intent that

each classroom have approximately 10 Google Chromebooks to aid small-group instruction and leverage software platforms such as i-Ready.

Class size: We will have four kindergarten classes with 25 students on average in each class. In grades one through eight, we are planning to serve up to three classes per grade level with an average of 28 students per class.

Structure: Classroom teachers will receive support and weekly coaching from grade-level deans and will work in grade-level teams to better meet student needs and plan effectively. Teachers will also meet in vertical teams to ensure that students are learning the needed skills at each grade level for success in the next grade.

3. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.

Our curriculum is aligned to the North Carolina Standards and Accountability Model. Effective research-based instructional strategies, adaptation to individual student needs, and meaningful and student-centered professional development will help fulfill our mission. Our moral focus program, interwoven throughout our school, will foster strong character in our students.

Alignment to mission: Our partnership with NHA, and its dedication to individualized instruction, will prepare students to achieve their goals. This commitment aligns with the mission we have created for OGCA: to prepare students with the academic skills and character traits necessary for success in college, careers, and life.

Alignment to student population: We expect to enroll students who have academic deficits, others who are learning at grade level, exceptional children, and others who are intellectually gifted, but we are not targeting enrollment efforts at any specific population. We will implement the following cyclical process to teaching and assessing to meet all student needs.

- *Identifying objectives and determining assessments:* Teachers will collaborate to identify objectives for units of instruction and use end-of-instruction (EOI) assessments to gauge student learning. Staff will also use periodic interim, mock state, and short-cycle assessments. Adjustments to instruction will be made based on evidence.
- *Developing building blocks:* After the educational objectives are reviewed and EOI assessments are determined, grade-level teams will identify building blocks of instruction to scaffold student learning towards mastery of each objective. These building blocks will be used to construct formative assessments in daily instruction.
- *Analyzing evidence:* Whether gathered through building-block or EOI assessments, teachers will analyze evidence at the student and classroom level. Teachers will determine what knowledge or skills need further development for students through the specificity of building-block assessments. As teachers meet to examine student work, they will gauge the instructional effectiveness. They will analyze evidence to discover student misconceptions and knowledge or skill gaps that may inhibit student learning.

- *Responding to evidence:* Teachers will identify opportunities for planned instructional adjustments prompted by evidence as they prepare their units. If learning progresses more quickly than expected, instruction will be accelerated. If learning progresses more slowly, more time will be spent delivering instruction. Teachers will consider EOI assessments to develop subsequent units. We also will allocate resources and work with NHA to hire additional intervention staff if ever needed for student success.

Alignment to accountability model: We will use our instructional framework to ensure that the curriculum and instructional approaches are producing academic gains for our students and that achievement is on track to meet and exceed measures in the state's Accountability Model.

Planned components: Our school will benefit from the curriculum developed by NHA, which is aligned with North Carolina requirements. We plan to use the following curricular tools:

- *Math K-5:* Bridges Mathematics and Math Expressions
- *ELA K-5:* Balanced literacy texts supplemented with Reading Mastery (K-2) and Corrective Reading (3-5)
- *Math 6-8:* Illustrative Math
- *ELA 6-8:* Selected texts specific to literacy value
- *Social Studies:* McGraw Hill
- *Science:* STEMscopes

Other: Intervention and accelerated materials will be available for use with Google Chromebooks, including i-Ready software for reading and math.

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.

Mastery of instructional strategies: Teachers at OGCA will be expected to use a variety of instructional methods that provide the most effective way to enhance learning for each individual student. Our primary methods will include direct instruction, modeling, demonstration, and think-alouds. Guided instruction may be done with large groups or with small, needs-based groups during workshop time or during content-area learning blocks to allow for differentiation of instruction (also see "Instructional Program," Section 2.1) A blended learning approach will also be used during workshop to meet the individual learning needs of students at all levels.

Teachers will use various methods to promote engagement, describe instructional intent explicitly, and implement appropriate rigor. Focused lessons will include direct instruction, modeling, demonstration, development of higher-order thinking strategies, and think-alouds, among other methods, and will be conducted in whole-group or small-group settings as student needs dictate. Guided instruction may be done with large, small, and needs-based groups during content-area learning blocks or workshop time for differentiation of instruction. Collaborative learning will be used to provide opportunities for students to learn from peers, to discuss ideas, and debate findings, or to participate in inquiry-based learning of curricular content. Independent work will be assigned to give students time to practice applying skills or knowledge they have

previously learned, to extend individual learning through the application of knowledge and skills to novel situations, or to promote the development of higher-order thinking skills.

Teaching will include effective, research-based instructional strategies embedded within daily lesson plans and implemented daily. Strategies that have high probabilities of effectiveness will be employed by teachers to meet student needs, including instructional strategies identified as highly effective by researchers at Mid-continent Research for Education and Learning (McREL).

Additionally, because effective learning requires that teachers shift the cognitive load to students in a purposeful and intentional way, teachers will develop students' knowledge, understanding, and skill incrementally through appropriately planned sequenced lessons and units of instruction.

Instruction will be designed to promote high achievement and meet the needs of all learners within the classroom. Throughout instruction, teachers will ensure that the formative assessment process is implemented with fidelity and that classrooms exemplify engagement, clarity of instructional intent, and rigor. School leaders will work individually with teachers to ensure that appropriate teaching techniques are used to enhance student learning and promote high expectations. Teachers will receive support from deans through focused professional development and weekly observations, subsequent coaching, and feedback sessions to ensure that they successfully implement teaching techniques that have been shown to promote student learning.

Teachers will drive instruction at our school with an intentional and collaborative planning approach of three sequential and interrelated steps: year-long planning, unit planning, and daily planning. Our formative assessments will inform planning by offering frequent and varying measures of progress to help determine the best approaches to teaching and learning.

Teachers are expected to implement strategies that help students take responsibility for their learning. This includes using learning goals as an instructional tool and helping students set individualized goals for themselves. Through this approach, both students and teachers are provided a clear understanding of the desired focus skill, and teachers are empowered to articulate what they are teaching while allowing students to describe what they are learning and to work at the appropriate level of difficulty (see *R.J. Marzano, Designing & Teaching Learning Goals & Objectives*, 2009).

Increased academic achievement: These instructional strategies provide a comprehensive approach of delivering educational content while incorporating the flexibility to adapt instruction to meet individual student needs and learning styles. Combined with the use of formative assessment to provide multiple measures of student performance data, our school as a whole will be able to adapt the delivery of educational content as student needs dictate. This is expected to result in the ability of each student, regardless of his or her academic starting point, to make measurable academic progress throughout the school year. Our approach is designed for student academic success and will build upon foundational content and skills in the early grades to implement more complex inquiry and learning strategies in the later grades.

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.

OGCA will be a K-8 school, and therefore, we will not have graduation requirements. Our mission is to prepare students with academic and character traits necessary for success in college, career, and life. The academic program is designed to give students the opportunity to attend a rigorous high school program and succeed. We will offer guidance on the selection of area high schools in efforts to help each student find the school that best fits their needs.

We will look to our principal to make the final decision for each student with regard to all potential grade promotions, accelerations, and retentions. Should a student fall short of the NC Read to Achieve mandate for third-grade students, we will offer interventions and personalized improvement plans. A variety of structures and procedures are incorporated into the school model to ensure that students do indeed receive the content, instruction, and interventions necessary to progress academically as expected. Deans will serve as the direct managers for teachers in specific grade-level cohorts and ensure that instructional plans are aligned and scaffold appropriately across all grade-levels to ensure smooth upward transitions for students.

OGCA will use formative assessments designed to include multiple checkpoints throughout instruction to measure student understanding of content. Teachers will analyze data at both the classroom and individual student level and then will scaffold student learning towards student mastery of each educational objective. School leaders will consistently review the data for all grade levels and ensure that the school's curriculum and instructional approach is accelerating student learning and will report this information to our Board throughout the year.

For students who struggle and show indications that they may not acquire the expected knowledge and skills planned for a particular grade level, we will have a formal, comprehensive, progressive structure of intervention designed to bring those students back on track (see the section on at-risk students, below). These programs, supported and informed by the school's formative assessment process, are designed specifically to ensure that by the end of one grade level, students are academically ready to transition to the next grade.

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

The envisioned school-year calendar for OGCA is a standard school calendar beginning in August and ending in June. Our draft calendar is included in Appendix D and aligns with the DPS district calendar. Our K-8 structure and traditional calendar will allow families with elementary and middle school children a choice that, while generally reflecting the schedule of many district schools, allows students to enroll in one school for nine years.

Correspondence with tenets of mission and instructional plan: Instruction will be organized around a master schedule in which every attempt is made to schedule math and ELA/reading courses in the morning and maintain science and social studies as focused priorities. This is to ensure priority attention is given to core subjects. The proposed schedule provides time for daily grade-level team planning while students participate in specials and co-curricular areas (e.g.,

music, art, and physical education, etc.). Grade-level planning teams will meet at least weekly to adjust teaching based on student learning evidence. This approach to instruction will allow students to be critical thinkers, active collaborators, and eager contributors to their own learning.

The proposed calendar has been designed to provide students with the opportunity to learn the content included in the school's curriculum while providing instructional staff with the support and professional development they need to grow as teachers. The additional hours of instructional time will ensure the effective implementation of our mission.

7. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.

We will work with NHA to develop our school day and week, and many components of the schedule will be similar to other NHA-partner schools. As currently envisioned, our school day will run seven hours, starting at 8:15 a.m. and ending at 3:15 p.m., and will provide 6.5 instructional hours per day. This structure offers students and parents more educational time than traditional district schools in our area. Anticipating that we will provide 1,110 hours of instruction each year, our school will exceed the required minimum instructional hours. We anticipate that each day students will receive 90-135 minutes of instruction in English language arts, 90-100 minutes of instruction in mathematics, 45 minutes of instruction in science, and 45 minutes of instruction in social studies. Students will also receive regular instruction in specials classes, such as art, music, physical education, and library/technology.

Also included in our calendar are 18 days (13 prior to school year, five days when school is in session) dedicated to professional development. We will schedule between two and four parent-teacher conference days. We believe teachers and staff need to be in the classroom, just as we expect our students to be, and we will hold teachers and staff accountable for absenteeism. Of course, we may modify our schedule based on the needs of the students who eventually enroll.

8. Describe a typical day for a teacher and a student in the school's first year of operation. At OGCA, we intend for each day to be an engaging, well-rounded learning experience. The typical day outlined below does not represent all the hands-on learning experiences that we plan for our students but is a day focused on classroom instruction and regular school day routines. This example day is based on experiences at other NHA-partner schools in North Carolina and will be tailored to become specific to our student population.

Typical day: Teachers will arrive at our school approximately 30 minutes before the instructional day is scheduled to begin. Teachers will use this time to prepare for students and create an initial assignment for students, often referred to as a "Do Now." For this typical day, Ms. Jones is a second grade teacher. Students will enter the classroom and Ms. Jones will begin with instruction in English language arts. OGCA will have a balanced literacy focus and Ms. Jones will have 130 minutes of instruction in reading that will take place through whole group instruction and read alouds; small group instruction with technology; and, independent work. After this learning block, students will transition to mathematics as OGCA plans to prioritize learning in these two

core subjects in the morning. Students will begin with a math story, which is a word problem that stimulates higher-order thinking skills to frame, solve, and explain a math computation. Ms. Jones will ask her students to work in small groups to discuss and present their answers. Students will go to recess and have a snack while Ms. Jones prepares for the next part of the math lesson. Ms. Jones and her students will resume math instruction, again working in both large and small group settings. After the math period of 75 minutes finishes, Ms. Jones and her students will begin a science lesson. Ms. Jones will make connections from the math instruction to science as possible and will help students to see the real-life applications of their learning. Next, Ms. Jones and her students will go to lunch. Students will eat in the gymnasium first and then will have lunch recess. Ms. Jones will use this time to eat lunch, talk with her colleagues, and prepare for her next lesson.

In the afternoon, Ms. Jones and her students engage in a lesson on social studies. As possible, Ms. Jones will make connections to the English language arts block and the read aloud text from earlier in the day. Students then proceed to a specials class. Today's class is music, where students are beginning to work on two new songs for an upcoming concert. During this time, Ms. Jones will meet with her grade-level team to analyze data from recent assessments and to begin planning for the upcoming units.

Students will return to the classroom for the final lesson of the day, which will highlight the monthly moral focus virtue. Students will discuss the virtue and how they have seen it applied in their classroom. Ms. Jones will wrap up the day with her students with a read aloud on the virtue and students will prepare to go home. Students will gather their belongings, ensuring that they know their homework assignments and have any papers to take home. OGCA will use a system called Drive Line, explained in more detail later in this application, to dismiss students in a safe and secure fashion. Students will remain in the classroom with Ms. Jones until their family is called and will then proceed out to the designated pick-up area. Some students may remain at school for after-school tutoring or care until their parents come to pick them up.

Ms. Jones will head to the media center for a quick staff meeting with updates on future school events. A more in-depth meeting is planned for next week, where staff will be analyzing data from beginning-of-the-year assessments to personalize instruction for students. Ms. Jones will head back to her classroom to briefly tidy up and prepare for the next day. Ms. Jones may also take a few minutes to connect with parents via the Parent Portal to share good news about their child's learning or to provide informational updates to all families.

#### High School Graduation and Postsecondary Readiness (High Schools Only)

9. Describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered.

Not applicable. OGCA will not offer high school grades.

10. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).

Not applicable. OGCA will not offer high school grades.

11. Explain what systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

Not applicable. OGCA will not offer high school grades.

**Attach Appendix B: Curriculum Outline per Grade Span (for each grade span the school would ultimately serve).** One sample curriculum outline (in graph form) in the Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.

**Attach Appendix C: 9-12 Core Content Electives.** Provide a visual description of what courses (both 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.

**Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)**

**Attach Appendix E: Daily and Weekly Schedule** Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

## 2.2 Special Populations and "At-Risk" Students

1. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.

We will have a comprehensive process that ensures students who need intervention are identified, served, and monitored. Our systematic intervention program is designed to stimulate early action that helps prevent academic failure and maximize the effectiveness of grade-level instruction. We will comply with the NC Read to Achieve mandate. This process is based on a framework consisting of six key practices:

- *Schedule intentionally:* A strategic schedule is set for the delivery of all needed services to each identified student. Scheduling also will accommodate the dedication of the most skilled interventionists to the students with the highest needs.
- *Create collaborative teams:* Intervention staff and classroom teachers will meet every four to six weeks to discuss student assessment data, monitor progress, and update intervention plans. This monitoring also will include students recently exited from intervention services.
- *Allocate resources appropriately:* School leaders, with NHA staff, will collaborate to ensure that funds are allocated in ways that will allow the school to maximize resources to best meet student needs.

- *Develop intervention plans:* Internal diagnostic assessments will be used to determine student needs, with data supporting the initiation of intervention services shortly after enrollment in the school. A written plan will be developed that details the interventions that will meet student needs and will be updated regularly.
- *Monitor progress:* Students struggling to make progress will be assessed at a minimum every two weeks, and those students identified with the most severe academic needs will be assessed weekly. Intervention goals will be set individually for each student based on these monitoring results.
- *Provide professional development:* One-on-one meetings between school leadership and intervention staff will be scheduled twice each month, and weekly coaching sessions will be set to focus on individual student data and strategies being used to meet student needs.

Within this systematic intervention framework, we will follow a three-tiered approach to provide intensified academic support.

- *Tier I intervention:* In Tier I, classroom teachers will respond to student learning needs within the context of regular classroom instruction. The initial screening assessment used at the beginning of each school year will be used to define the needed individualized instruction. During the school year, we will leverage our formative assessment process, classroom assessments, NHA's common assessments, and a benchmark assessment (likely, NWEA) to ensure individual student learning progresses appropriately.
- *Tier II intervention:* If a student does not master content through the first tier of intervention as measured by the assessments in the previous section, or if early screening shows significant academic deficits, more prescriptive Tier II interventions will be used. This includes supplemental instruction and coaching using programs and approaches that are proven to accelerate student learning. These well-researched intervention programs will be used to quickly increase student achievement. Other intervention strategies may be provided in the classroom in a workshop setting or delivered through supplemental support outside of the general education classroom during non-core educational programming.
- *Tier III intervention:* If progress monitoring data shows that a student is not making sufficient progress after tier II interventions, the student will be moved into Tier III interventions. Tier III interventions will include an intensified approach that focuses on selected high-priority reading and math skills. Depending on the need, one-on-one concentrated tutoring will also be considered whenever appropriate. If these interventions do not succeed, the school's EC team will meet with the student's parents and may recommend an EC referral meeting.

2. Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, ELs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.

A key benefit of our partnership with NHA is the organization's experience in identifying and meeting the needs of a variety of student populations. We have seen this firsthand at RTCA, a current NHA-partner school in our community, and we intend to have this same success and

commitment at our school. As described above, we will have a comprehensive approach to identifying students that may be struggling academically once they enroll at our school. Prior to enrollment, we will request student records, including assessment results, from their prior schools in order to determine if students were receiving services as a part of an IEP, Section 504 plan, or due to other academic needs. We will prepare to meet these needs at OGCA and will hire staff accordingly, as described below.

3. Explain how the instructional plan and curriculum will meet the needs of English Learners (EL), including the following:
  - a. Methods for identifying EL students (and avoiding misidentification).
  - b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for EL students.
  - c. Plans for monitoring and evaluating the progress and success of EL students, including exiting students from EL services.
  - d. Means for providing qualified staffing for EL students.

OGCA is committed to ensuring that EL students have access to high-quality education and instruction. While we do not have a specific location picked out for our school, we intend to serve an EL population similar to surrounding schools.

At OGCA, we believe all teachers are teachers of ELs. Our EL program is designed to ensure that EL students are equipped with the essential academic vocabulary, knowledge, and skills necessary for academic success, both within the school and beyond.

Methods for identifying EL students: The school will work with students and families to identify ELs through home language surveys and the WIDA-ACCESS Placement Test (W-APT).

All new entrants will complete the Home Language Survey (HLS). If it is indicated on the questionnaire that a student's home language is English, then the screening process will be discontinued. If it is indicated on the HLS that the student's home language is not English, we will conduct an informal interview with the student in his/her native language and in English. Upon confirmation that the student is a potential EL, the student will be take the W-APT.

If the student scores at the "commanding bridging (proficient)" level on the W-APT, the screening process will be discontinued. If the student scores at the "entering," "emerging," "developing," or "expanding" level, then the student will be considered eligible for the school's EL program. All EL student information will be recorded in the school's student database.

During the screening process, EL staff will take appropriate action if the student is a student with a disability that enters with an IEP or if the student has had interrupted formal education, following the process outlined in the WIDA Resource Guide. The parent or guardian in parental relation to an EL student will be notified, in English and in their native language, of their child's eligibility for the EL program. Each EL student who is a new entrant will be offered an orientation session with his/her parents or guardians on the state standards, assessments, school

expectations, and an overview of the EL program. This orientation will take place within the first semester of the child's enrollment in the school and, when needed, will be provided in the first language of the student's parents or other persons in parental relation to the student. Parents or guardians will also receive written notification, in English and in other languages as necessary, of the identification of their child as an EL student, the programs available to their child(ren), and their right to refuse such services. The school will make every effort to meet with the parents or guardians of EL students, at least twice a year, to help them understand the student's progress.

Students will take the ACCESS assessment for ELs annually, along with the state assessments for their grade level. The results of these assessments will be used to continually update and modify the plans of assistance for each student, as well as to determine the criteria to exit our EL program, as described below.

Specific instructional programs, practices, and strategies: We will implement an effective, research-based approach to accelerating English language acquisition for EL students that includes Sheltered English Immersion (SEI) in the general classroom, as well as specific language acquisition instruction called English Language Development (ELD). SEI is the vehicle for the acquisition of grade-level content, while ELD is driven by the need to increase proficiency in English and specifically the academic English necessary for success in school.

- SEI is the provision of an immersion environment, where all classroom instruction is delivered in English by the classroom teacher with an awareness of the unique characteristics and needs of ELs, and additional realia, scaffolding, and background knowledge provided during the course of lessons (Genesee, Lindham-Leary, Saunders, and Christian, 2006). The hallmarks of effective teaching and learning, such as the nine instructional strategies in *Classroom Instruction that Works*, the formative assessment planning process, the NHA Curriculum, NHA's proven best practices, and differentiation to meet individual student needs, remain in an SEI classroom, with additional language supports in evidence. SEI is also referred to as Sheltered Instruction or SDAIE, Specifically Designed Academic Instruction in English.
- ELD is focused on helping students acquire social and academic English. The SEI classroom enables access to the grade-level content, despite a lack of proficiency in English, while ELD is intended to dramatically increase the level of proficiency. ELD combines "a) explicit teaching that helps students directly and efficiently learn features of the second language such as syntax, grammar, vocabulary, pronunciation, and norms of social usage and b) ample opportunities to use the second language in meaningful and motivating situations." (Goldberg, 2008) Students that are provided with ELD in a separate block have been shown to have "modestly but significantly higher English oral language and literacy scores" (Saunders, 2006) as teachers focused on developing oral literacy in English. ELD should take place as a supplement to the defined ELA instruction, not in place of such instruction, and will frequently take place outside of the general education classroom, though not always. ELD is also referred to as English as a Second Language (ESL) or Teaching English to Speakers of Other Languages (TESOL).

OGCA will invest in resources that successfully close achievement gaps for EL students. All staff will receive professional development on strategies for working with EL students and

engaging EL parents. This will ensure that all staff members take ownership for the EL students in the school and will be equipped with the necessary tools to meet their needs. We will include EL students in all school classes and activities. Instructional materials for ELs will be evaluated and selected based on the proven success of the tools in meeting the needs of similar populations of EL students. Materials such as Pearson’s Language Central will be considered and/or implemented targeting students at the “developing” or “expanding” levels of the W-APT. Materials such as Pearson’s Newcomer Phonics will be considered and/or implemented targeting students who are new to the United States or at the “entering” or “emerging” levels of the W-APT. Additionally, leveled libraries specific for ELs will also be available.

We will adjust staffing as necessary based on the enrollment of students. One member of the staff will also serve as our EL coordinator to coordinate EL data, schedules, and ensure that EL students are not over-classified as students with special needs. This individual will evaluate the needs of the school to provide additional services to meet EL student needs.

We are committed to ensuring that EL students and parents are not excluded from curricular and extra-curricular activities due to an inability to fluently speak and understand the language of instruction, including any before- or after-school tutoring and summer learning programs. We will provide to the parents or other persons in parental relation to EL students school-related information in English, or when necessary and feasible, in their dominant language.

Plans for monitoring/evaluating the progress/success of EL students: OGCA will track the academic achievement of ELs and the progress they are making towards proficiency in English. The school will utilize multiple measures to track progress, such as the progress-monitoring tool available within the EL program curricular tool, classroom assignments, formative assessments, grade-level assessments, the NWEA MAP, North Carolina assessments, and the ACCESS for ELs. EL students will be required to participate in North Carolina’s ELA, mathematics, science, and social studies tests that may be administered in English or an alternative language with approved EL accommodations. EL students who have been enrolled in a school in the United States for less than one year are not required to take the ELA assessment and may take the ACCESS for ELs in its place.

In order for an EL student to exit the EL program, the student must score at the proficient level on the ACCESS assessment for ELs. Additional exit criteria will also be considered to ensure that the student is ready to be exited from the EL program with limited supports. Students will be monitored for two years after exiting the EL program. OGCA will track the grades of the monitored students and will intervene as necessary to promote and ensure academic success. Family involvement, high expectations, and active learning techniques will continue to encourage individual students to achieve greater academic success after exiting the EL program.

Means for providing qualified staffing for EL students: All students identified as ELs will have a Language Acquisition Plan created that documents their level of proficiency in English (overall and in the domains of listening, speaking, reading, and writing), provides student-specific goals for each domain of language, and contains all accommodations/modifications to be utilized in classroom instruction and on assessments, as appropriate and allowable.

This plan will provide a common understanding of the needs of each EL student for the classroom teacher and EL staff. Additionally, the school will use the plan to coordinate between staff members on how to meet the needs of the student in language acquisition and academic achievement and to communicate progress or newly identified areas of need.

4. Explain how the school will identify and meet the needs of gifted students, including the following:
  - a. Specific research-based 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 gifted students; and means for providing qualified staffing for gifted students.

Students who possess exceptional gifts and talents should receive the direction, time, encouragement, and resources to maximize their potential. Our school will work with parents and students to identify gifted and talented students from all backgrounds, and to provide instruction that nurtures and fully grows that excellence.

Methods for identifying gifted students: For all students, our school will use an assessment in reading and in mathematics that is referenced to national norms (likely NWEA). To ensure continuing academic growth for each student, the school will be committed to thoroughly monitoring students' progress and adjusting learning opportunities when growth is inadequate. In addition to using these assessment results, classroom teachers will monitor mastery of curricular content, as measured through classroom assessments. This process will allow the school to identify students who are performing at the very highest levels, a potential indicator of a student's identification as gifted and talented.

Specific research-based instructional programs, practices, strategies, and opportunities:

Classroom teachers will offer gifted and talented students differentiated instruction and extended opportunities through a variety of means, including: enrichment lessons, exercises, and content; differentiation in content, process, products, and/or learning environment; infusion of tasks requiring higher-order thinking skills; and individualized learning opportunities. When needed, the school will accelerate grade-level or content-level learning for individual students, taking into consideration his or her specific needs. Students at or above grade-level proficiency will be consistently challenged with classroom curricular content and high-quality instruction.

### 2.3 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 education teachers 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.

OGCA is committed to serving all students and will be prepared to serve exceptional children from day one. When a new student enrolls, parents will be asked to indicate if their child has an Individualized Education Program (IEP) or Section 504 Plan and to provide a copy of records.

We will share any provided information with the dean overseeing special education, the classroom teacher, and the special education teacher. The registrar will request a copy of all school files, including special education and Section 504 records from the child's prior school. Upon receipt, the registrar will review all student files to determine if the student received special education or Section 504 support. If the student received special education or Section 504 support and these records were not provided by the parent or received in the student's cumulative file, then the registrar will immediately request the missing records from the student's prior school/district. School leaders and appropriate staff will then be notified of this information. Upon receipt of a student's current IEP or Section 504 plan, staff will complete the transfer process consistent with state and federal requirements. Comparable services, consistent with the received IEP or Section 504 plan, will be provided until the IEP or Section 504 plan is accepted or a new IEP or Section 504 plan is developed, consistent with state and federal requirements.

If a complete special education record is not received within 14 days and we believe that the student may have an IEP, the school will contact the prior school. If we do not obtain that info, the school will initiate the special education referral or re-evaluation process. We will identify students with special needs when they enter the school with an active IEP or when they go through our Intervention Assistance Team (IAT) process, as described below.

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. Include how the school will avoid misidentification of special education students.

Since some students may come to OGCA without an active IEP or identified disability, we know we will be responsible for identifying students who may need special education services under IDEA or Section 504, consistent with state and federal Child Find requirements. We will have several strategies in place to identify students with special needs.

Student identification: If a student is experiencing academic and/or behavioral difficulties in the general education setting, the teacher, other educational staff, and/or the parent may refer the student to the school's Intervention Assistance Team. This team will include the principal (or designee), a classroom teacher, and the referring teacher. The student's parent or guardian will be invited to participate in this meeting and share more information. The IAT will review and analyze screening information/data, RtI results, and data on classroom performance, discipline, and state assessments, as well as information provided by parents. We will use this data and information to determine the best educational/behavioral interventions for the student and

service/support options (e.g., counseling or school social work support). Outcomes of this meeting may include:

- Continuation of current intervention and progress-monitoring through the RtI process.
- Implementation of additional interventions through the RtI process.
- Referring the student for a Section 504 evaluation.
- Referring the student to the special education team for consideration of a comprehensive special education evaluation.
- Implementing no further action and continuing to monitor the student's academic, behavioral, and/or social progress.

Avoiding misidentification: This RtI process will help us avoid misidentification and over-referral of students for EC instruction. Parents can request a special education evaluation at any time, including instances when they disagree with the outcome of the IAT meeting. The school will respond to this request consistent with state and federal timeline requirements.

Evaluations and assessments: The dean overseeing exceptional children will work to schedule a special education evaluation. The evaluation team will include various professionals consistent with the type of disability or disabilities suspected, such as teachers of general education, special education, and speech and language, as well as an occupational therapist, school social worker, and school psychologist/mental health provider. The team, with parents invited to be members, will meet to identify what evaluations are needed to diagnose disabilities defined by state and federal requirements. Parents may share new information, including evaluation/medical information from private providers. Parent notice and consent will be requested and obtained before initiating special education testing. The IEP team, including the multidisciplinary team (or representative) and parent, is responsible for determining special education eligibility, identifying the student's needs, and developing an individualized educational plan to address the student's needs in accordance with applicable state and federal special education requirements.

The evaluation process is nondiscriminatory, and any written material will be in the family's native language. Tests must be validated, selected, and administered by certified or licensed personnel, consistent with the testing administration guidelines and in compliance with all state and federal requirements. Multiple measures will be used, and the evaluation will assess areas of educational need and all the child's special education and related service needs. Upon completion, the dean will schedule an IEP team meeting in consultation with the parent. The IEP team will review the results of the comprehensive evaluation and any additional relevant information provided by the parent and then determine eligibility for special education consistent with state and federal requirements (including rule-out factors). Following the determination of special education eligibility, the IEP team will develop an IEP for the student. This plan will be designed to address the student's unique needs and satisfy the requirements of a free appropriate public education (FAPE) provided in the least restrictive environment (LRE).

Placement will fall along a continuum of options with primary emphasis being placed on educating the student in the general education classroom to the greatest extent possible with

implementation of needed supplemental aids/services, and/or supports.<sup>1</sup> Removal from the general education classroom will only take place when the nature and severity of the student's disability necessitates this removal. A continuum of placement options will be available to support student placement decisions, including consideration of placement in more restrictive settings operated by the local district or other external entity.

Child Find requirements: OGCA will comply with obligations under the Child Find requirements of the Individuals with Disabilities Education Act (IDEA), including 34 CFR §300.125. We will appropriately notify parents consistent with state and federal requirements. We will also incorporate Child Find in marketing efforts within the community to attract the broadest possible spectrum of students, including students with special needs. Our strategy will aim to reach every family with a K-8 school-aged child within our geographic area via media, direct mail, and parent information meetings. By targeting broadly, we will attract students who reflect the entirety of the community we serve and ensure that students learn in an integrated environment.

We will hold meetings for families of EC students and our special education professionals to review our special education program at the school and encourage questions.

3. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:
  - a. Requesting Records from previous schools
  - b. Record Confidentiality (on site)
  - c. Record Compliance (on site)

The principal will assign a dean to oversee programming for exceptional children at OGCA. This dean will conduct weekly one-on-one meetings with the special education staff to discuss student progress and the timing of annual reviews and three-year re-evaluations. This will include review of service logs to verify compliance with the student's IEP service time and progress-monitoring data. Progress reports will accompany report cards, and deans will discuss student progress relative to IEP annual goals at one-on-one meetings with teachers. General education teachers will keep a record of the IEP or Section 504 accommodations and modifications that are to be made in the general education setting. Special education teachers will provide a copy of an "IEP-at-a-glance" to regular education teachers to allow for collaboration on student goals and objectives in the grade-level curriculum.

NHA special education supervisors and school professionals will annually evaluate special education at OGCA, focusing on Child Find activities, educational outcomes, IEP implementation, parent involvement, compliance, and behavior. A review of data for each of these areas will be conducted. A continuous improvement plan (CIP) will be developed for any areas not yet "met." The special education dean and the NHA special education supervisor will monitor progress toward the goals outlined in the CIP and adjust as necessary.

Record request, confidentiality, and compliance: School staff will request records from the

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<sup>1</sup> This approach is supported by years of strong research on the effectiveness of inclusive education practices, including a study by the National Center for Education Restructuring and Inclusion, 1995, research by Audette & Algozzine, 1997, and research by Lipsky, 1997; Sailor, 2003.

student's previous school or district. If complete records are not received within 14 days from notification that the student is an exceptional child, staff will reach out to the prior school. If the requested information is not obtained, our school will initiate the EC referral or re-evaluation process. Staff will collect, handle, and secure the records at OGCA and share these documents with parents in accordance with all relevant state and federal laws and regulations.

#### Exceptional Children's Programming

4. Explain how you will meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.

OGCA will provide appropriate services and specially designed instruction for students with Individualized Education Plans (IEPs) and 504 plans, which will allow access to, and promote progress in, the general education curriculum. We will serve all children according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. We anticipate serving students with mild, moderate, and severe disabilities and will assign a dean to oversee all EC programming.

Educating exceptional children requires both individualization of the educational programs and services and maximizing inclusion in the general education setting. Our service delivery model may include co-teaching, consultant teacher support, and/or support provided through resource room services. We recognize that the least restrictive environment for some students with special needs may require more extensive supports, including placement in programs operated by the local district or some other setting.

The focus of instruction will be on IEP goals and objectives and grade-level content expectations with scaffolding of instruction from the student's instructional level to grade-level expectations. Emphasis will be placed on accelerating learning outcomes through delivery of research- and evidence-based practices and resources with the goal of closing the instructional gap toward grade-level proficiency. Screening and assessment data will be used to determine student instructional levels and needs. Whenever appropriate, grade-level instructional materials will be used with needed accommodations and supports. For students significantly below grade level and/or missing foundational reading and/or math skills, we will use a direct instructional approach and supporting resources.

If a student consistently does not make progress on IEP goals and objectives, the teacher will inform the dean, who will then schedule an IEP team meeting and/or an additional evaluation. The school will conduct a functional behavioral assessment (FBA) when a student's behavior negatively impacts his/her academic, and/or social/emotional performance within the school setting. Based on this data, the IEP team will consider the need for positive behavior support or a behavior intervention plan (BIP). Emphasis within this plan will be placed on identifying the function of the target behaviors, teaching desired replacement behaviors, implementing strategies designed to prevent behavioral escalations, and providing a sequence of strategies and procedures that can de-escalate behavior. A core team of building staff will be trained in non-violent crisis prevention intervention (CPI) techniques to support crisis situations with emphasis placed on verbal de-escalation and the use of intervention procedures designed to keep the

student and staff safe. Behavioral incidents resulting in the need to utilize CPI-approved physical intervention techniques will result in immediate parental contact with a written summary provided to the parent within 24 hours of the incident. This documentation will also be maintained on file at the school.

5. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?

Students requiring specially designed instruction will either have their services delivered in the general education classroom through a co-teaching and/or consultant teacher service delivery model and/or through delivery of services within a resource room as determined by the IEP team based upon the unique needs of the student. The IEP team will consider the requirement that services be provided in the least restrictive environment with priority given to programming in the general education classroom. OGCA will prioritize collaboration among general education and special education teachers. Both general education and special education staff will receive professional development targeting effective collaborative teaching practices.

Instruction provided outside of the general education classroom will only take place when the nature and severity of the student's disability necessitates this model. A continuum of services and placement options will be available to support student placement decisions, if necessary, including consideration of placement in more restrictive settings operated by the local district or other external entity. Related/ancillary services (speech, mental health, physical, and occupational therapy) will be provided and scheduled consistent with the student's IEP. These services will be provided by properly certified and licensed practitioners who will be employed or contracted by NHA or provided by the local school district or other affiliated agency.

6. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

We will serve all children according to their individual academic, functional, and social and emotional needs, providing a free and appropriate public education (FAPE) in the least restrictive environment (LRE) in accordance with state and federal requirements. OGCA will assign a dean to oversee the programming for students with special needs.

7. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.

Data will be routinely collected to monitor student progress on IEP goals and objectives and to support instructional decisions. The school also will ensure that parents of children with disabilities are informed of how their child is progressing on annual IEP goals and in the general curriculum at least as often as parents of general education children.

IEP monitoring: If the student is not making progress on IEP goals/objectives, the school will schedule an IEP team meeting, including parents. The IEP team will review and revise the IEP as needed and consider additional supports, services, placement options, and any other identified needs. If the child's needs extend beyond the capacity of the school setting, the school will work with the parent to explore additional educational options.

OGCA will administer a norm-referenced assessment multiple times each year to identify baseline skills and to assess growth targets. Staff will routinely implement curriculum-based and progress-monitoring assessments. Assessment data obtained will be used to monitor and adjust instructional practices based on the student's response to instruction. Special education providers will also use this assessment data to monitor student progress on IEP goals/objectives and for reporting purposes (e.g., report cards, parent-teacher meetings, IEP team meetings). Monthly data walks will be conducted during special education team meetings to review progress. Special education providers will also use curriculum-based assessments and other progress-monitoring data collection tools to monitor progress on IEP goals and objectives.

IEP reporting: Parent partnership is a cornerstone value of OGCA and will begin the day a student enrolls in the school. Parent involvement is an integral and ongoing part of the special education evaluation, eligibility, and IEP processes. Parents will be invited to join parent-teacher conferences, will receive IEP progress reports, and will be invited to review behavior issues and develop positive behavior support plans (usually linked to the IEP process). Special education procedural safeguards will be provided to the student's parent or guardian:

8. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.

The school will hire certified teachers, as required, to ensure high-quality instruction for students with special needs. Staff credentials will be reviewed to ensure compliance with the certified teacher requirements. Related service staff will have state-required credentials before providing services to eligible students.

All new staff, including special education teachers and support/itinerant staff, will join a new staff orientation session before the start of the school year to learn the school's mission and special education practices and procedures. Special education staff will receive additional PD during professional development days and special education staff meetings, at regional/state conferences, and in weekly one-on-one meetings with the dean overseeing special education.

Three special education teachers and three special education paraprofessionals will be on staff in our first year to support students with IEPs. Additional staff will be added should our special needs enrollment exceed our estimate. Depending on the needs of the population after enrollment, the school also will have ancillary staff, such as a social worker, speech therapist, occupational therapist, physical therapist, and mental health provider, either on staff or through a contract. Additional special education staff will be added based on student need, consistent with state or local district caseload requirements.

## 2.4 Student Performance Standards

1. Describe the student performance standards for the school as a whole.

We will be focused on analyzing the academic and operational outcomes of our school. In order to do so, we must hold NHA accountable with the appropriate measures.

Goals: As with other NHA-partner schools, we will use measures of academic growth and proficiency beyond those required by state law, and our school will share similar goals with other

NHA-partner schools in North Carolina and elsewhere. Our academic goals look at proficiency, comparisons against DPS, course completion, and growth (See Section 1.3 for full details on these goals).

As required, we also will administer a national assessment of college readiness to every eighth-grade student and will use the results to develop a plan for each student's success in high school and college. As noted above, one of the reasons we chose to partner with NHA was the track record of success in ensuring that students are high school- and college-ready.

We expect our school to achieve operational goals established for NHA-partner schools, too. Our operational goals will measure attendance, parent satisfaction, the fiscal state of OGCA, and the performance of NHA (See Section 1.3 for full details on these goals).

Our academic goals will include comparisons to neighboring district schools and state and national averages. Our goals are specific, measurable, ambitious, attainable, relevant to our mission, and time-specific. Each goal focuses on a specific assessment and assessment period, and each is designed to encourage consistent improvement and achievement in student learning.

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.

OGCA will regularly test the efficacy of teaching and the quality of learning with a wide range of assessments that monitor the progress of all students. NHA will work with teachers and leaders at OGCA to ensure that assessments offer optimal alignment.

Use of assessment data: Our school will administer frequent, varied assessments throughout the year to ensure that students make appropriate progress pursuing mastery of state standards. We collect and analyze results from assessments that are closely aligned with standards, so we can understand the efficacy of our curriculum and instructional methods and adjust instruction, often in real time, if needed. Our assessments will range from simple exit tickets to interim assessments and, of course, state assessments; each of them offers valuable and actionable insights on our curriculum and instruction. This will include ongoing formative assessments, NHA's common assessments, state assessments, and internally created assessments.

Our key assessments will include:

- *Formative assessments:* OGCA will administer formative assessments multiple times per year to provide important benchmark data on student growth.
- *Interim assessments:* We will administer interim assessments two or three times per year to give deans and teachers long-term snapshots of students' learning and preparation for end-of-year state assessments.
- *Unit tests:* Teachers will administer unit tests in specific subjects after completing instruction in that area of learning. Students who score poorly will be re-taught and re-tested.

- *Quizzes:* Teachers will challenge students with quizzes at the end of each week to take a quick snapshot of student learning covered that week. Data from these quizzes, which are also closely aligned with state standards, are analyzed in real time so teachers know whether and how they must modify instruction. In fact, at NHA-partner schools, it is common for instructional professionals to modify teaching plans within a day of receiving quiz results. These modifications may include the re-teaching of material the next school day, changing workshop groupings of students so students who struggled have a second chance to learn the material, and more.
- *Exit tickets:* On any day, teachers may give an exit-ticket assessment based on the standard that was the focus of that day's lessons. Because our instructional plans are driven precisely by standards, a simple roomful of thumbs up or down will offer teachers valuable, aligned, and actionable feedback.

Common assessments: NHA has developed common assessments in both English language arts and mathematics for grades K-8. Common assessments align closely with instructional objectives, are easy to administer, provide automated scoring, document student progress, and show when new support is needed to ensure appropriate progress. Curriculum-based and interim assessments provide common data to show student progress.

Assessment professional development: As part of our commitment to data-driven instruction, we will prioritize professional development designed to help teachers improve their skills analyzing data for insights and applying those insights to instructional planning and delivery.

Our school leaders and teachers will collaborate during grade-level or departmental planning time to analyze assessment data. This analysis will seek to help them identify, understand, and address learning gaps, set improvement goals, and clarify needs. These efforts will focus on individual students, on entire grade levels, and on the entire school.

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.

The principal is authorized to make initial grade placement of students and has the final decision regarding the promotion, acceleration, and retention of students. A student is expected to progress through one grade each year. On occasion, it may be in a student's best interest to accelerate him or her more than one grade or retain him or her to repeat a current grade. These criteria will be shared with families in our parent-student handbook.

If a student fails to meet the third-grade requirements of the NC Read to Achieve mandate, additional interventions and a personalized reading improvement and monitoring plan will be offered. If not proficient after these interventions, the student will be retained unless they meet a good cause exemption. Retained students will receive additional intervention support. Any decision to retain an exceptional child will be determined by the principal, in consultation with the IEP team. EC students may not be retained based solely on their exceptionality, but retention may account for factors such as a student's ability to fit in socially and emotionally with their present grade level.

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 students at risk of dropping out.

Students will exit our school and be promoted to high school in accordance with the North Carolina Student Accountability Standards. We believe strongly that students should leave our school academically prepared for a rigorous high school program and with the required skills, both social and academic, to graduate from high school and be college-ready. The practice of promoting students who have failed to master part of their grade-level curriculum is incompatible with the state's gateway standards, the academic goals of our school, and our mission. Our Board is committed to meeting the needs of students who are at-risk academically and will quickly identify students who need extra attention, as well as those who are surpassing grade-level standards, for differentiated instruction. As such, we will use those tools to ensure that at-risk students receive the appropriate supports and are exited from our school successfully.

## 2.5 School Culture and Discipline

1. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.

Together with our school leader and NHA, we will create a culture and climate for OGCA that aligns with our mission. We believe student learning is an adult responsibility, and as such, will ensure our school community strives for and meets high standards in terms of academics, discipline, and embodying what it takes to be successful citizens.

We believe time spent on student discipline is time not spent on student learning. The philosophy behind the discipline policy is to create and maintain a culture that commits to individual student achievement. We will adopt, implement, and sustain a program called Behave with Care, in place at other NHA-partner schools, and described below. Teachers and staff will reinforce positive behavior through relationship building, classroom motivation systems, development of social contracts, precise praise of positive behavior, and individual student affirmations.

Through this program, we will promote academic achievement while developing our students to be successful citizens with many opportunities for their lives, including college and careers.

2. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.

OGCA will be a school open to all students and will welcome students whenever they enroll. We plan to hold a variety of meetings prior to the start of school that can begin to build our culture for families and the community. We plan to advertise broadly and will share our mission and vision. We know that student learning is an adult responsibility and therefore we plan to start our school culture with our principal and school staff. We intend to hire a leader who believes that all children can learn at high levels and will drive this belief throughout OGCA. Our staff will spend time together in professional development prior to the start of school to learn our systems, processes, and build culture.

Any students that enroll at our school mid-year will be welcomed and we hope to maintain a strong waitlist to fill any available vacancies. New families will have an orientation meeting prior to enrollment and will be assigned a partner student, and family, if available, to model our school culture and answer any questions that arise.

3. Provide a brief narrative that delineates 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:
  - a. Practices the school will use to promote effective discipline.
  - b. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.
  - c. An explanation of how the school will take into account the rights of students with disabilities in regard to these actions that may or must lead to suspension and expulsion.
  - d. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.

Promotion of effective discipline: Time spent on student discipline is time not spent on student learning. The philosophy behind our discipline policy is to create and maintain a culture that commits to individual student achievement. We will adopt, implement, and sustain a values system we call Behave with Care, which includes schoolwide behavior and classroom management practices, is rooted in the concept of relationships and engagement, and is aligned with the U.S. Department of Education's Positive Behavioral Interventions and Support model. Behave with Care includes a six-level color-coded, schoolwide behavior management system to ensure positive behaviors are reinforced. Teachers and staff will consistently reinforce positive behavior through relationship building, classroom motivation systems, adherence to social contracts, precise praise of positive behavior, and various forms of student affirmation.

In alignment with Behave with Care, teachers have access to Positive Behavior Replacement Plan tools. The activities help students understand the consequences of their behaviors, why the behavior is not acceptable, and how they can behave differently next time. NHA's Moral Focus curriculum is designed to help create an environment that is conducive to teaching and learning, and help students learn how to manage their behavior and be a part of a community

Equitable application: We will ensure our program is equitably applied to all students at OGCA, while remaining mindful of individual student needs. The system clearly defines examples of behaviors at each level and appropriate consequences, and details of incidents will be recorded in our student information system to ensure all behavior incidents are noted and treated consistently. Additionally, these records are made available to parents. Teacher observations and feedback ensure consistency from student to student and from classroom to classroom, which in turn will create a common set of expectations for behavior among all students and adults.

Professional development: We will provide professional development designed to help school leaders and staff build positive, productive, and trusting relationships with students. This includes training on Behave with Care before the start of the school year, with ongoing support throughout the year in the form of additional professional development, e-learning, virtual

classroom instruction, observations with feedback and coaching, and video modeling. Teachers will learn strategies to establish safe and orderly classrooms, reinforce positive behaviors, address problem behaviors, and encourage students to take responsibility for their actions.

Offenses; application to exceptional children; due process: Our parent-student handbook will include information on major aspects of the student discipline policy, including offenses eligible for disciplinary action. We will follow federal and state laws as well as NCDPI policies to ensure that due process and grievance procedures are followed whenever suspending or expelling students with disabilities or suspected disabilities is considered. These processes will be further detailed in an EC handbook provided to staff at all NHA-partner schools.

### Certify

This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application. Yes No

Explanation (optional): As noted, our application was prepared in partnership with NHA. As such, our Board understands much of the language regarding practices, procedures, and systems will be similar to applications of other schools that have chosen to engage NHA as their management partner.

## Section 3 Governance and Capacity

### 3.1 School Governing Body

#### 1. Private Non-profit Corporation (NCGS 115C-218.1)

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

Name of Private Non-profit: Oak Grove Charter Academy, Inc.

Mailing Address: 192 Sheep Rock Rd., Snow Camp, NC 27349

Street Address: 192 Sheep Rock Rd.

City/State/Zip: Snow Camp, NC 27349

Phone (xxx-xxx-xxxx): 919-218-6060

Fax: (xxx-xxx-xxxx): 919-869-1888

Name of Registered Agent and Address: Philip S. Adkins (192 Sheep Rock Rd., Snow Camp, NC 27349)

Federal Tax ID: TBD

#### 2. Federal Tax-Exempt Status (NCGS 115C-218.15)

If the non-profit organization has yet to obtain 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.

The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status:

- Yes. **Attach Appendix F Federal Documentation of Tax-Exempt Status**  
 No.  
 N/A. The applicant is a tax-exempt municipality.

### 3.2 Governance

The private nonprofit corporation or municipality 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.

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

Board Member Name	Board Title	County of Residence	Current Occupation	Past or Present Professional Licenses Held	Any disciplinary action taken against any of these professional licenses?
Gerald McNair	Lead Applicant	Granville	Field Sales Representative	Health, Life, and Long Term Care Insurance holder	None
Robert Fountain	Director	Granville	Retired	None	None
Iris Garner	Director	Lee	Global Research Consultant	None	None
Kyle Jones	Director	Wayne	Airway Transportation System Specialist	Class A licensed commercial driver	None
Milton Tabron	Director	Granville	Retired	None	None

**2. Describe 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.**

Our Board has the advantage of prior experience with our management partner, NHA. Gerald McNair is a Board member at our sister school, RTCA. He has shared his experience with NHA and the ways the Board will hold the organization accountable. We will seek out the opportunity to meet and consult with other Board members at Research Triangle to ensure best practices for our school. Our role as the Board will be one of governance, overseeing NHA to provide us with the day-to-day operations of OGCA.

Roles and duties: We take seriously our responsibility to ensure OGCA is on the path to meet its mission, goals, and vision. We will work with NHA to make sure our school has the resources and support needed to create an environment where students thrive. We will make decisions in the best interest of academic success, compliance with our charter, state and federal requirements, and the fiscal health of OGCA. Our Board has engaged independent legal counsel and an auditor. They will offer us guidance with regard to legal decisions, and our independent auditor will report out on the state of our school's finances. From time to time, we may contract with a third-party to evaluate our management partner and will adjust accordingly.

As a result of Mr. McNair's experience with NHA, as well as its documented record of success, we are confident the organization will offer us everything needed to successfully serve families and be a strong beacon of the community. Serving on our Board is not a role we take lightly. We will put in place policies that reflect the necessary transparency across our Board, school, NHA, and community.

Roles and responsibilities: Our Board will perform functions including, but not limited to: articulating, maintaining, and driving our mission throughout the school community; holding NHA accountable for the efficient and effective operation of the school and for the achievement of academic goals; reviewing and approving the school's annual budgets and ensuring that proper financial procedures are in place and effectively implemented; reviewing, approving, and monitoring progress toward academic, financial, and operational goals; reviewing and approving school policies; ensuring that sufficient enrichment programs are created to supplement the education program; appointing officers and committees as needed; adopting, amending, and repealing bylaws as needed; developing and maintaining effective relations with NCDPI and the Office of Charter Schools; and ensuring that meetings are conducted in accordance with open meetings laws and in compliance with North Carolina conflict of interest and public records laws. Our school leader will share with us information necessary to understand every component of how our school is achieving.

Hiring lead administrator (Principal): Under our partnership arrangement, teachers will be jointly employed by our Board and NHA and school leaders and other non-teaching staff will be employed directly by NHA. NHA has an experienced and expert school leadership recruitment team that identifies and evaluates school leaders for their skills, experience, and personal attributes. Thus, while our principal will report as an employee directly to NHA, the principal will be responsible for regularly reporting about the school to the Board and the Board will hold our principal accountable, along with NHA, for the school's performance.

3. Describe the size, current and desired composition, powers, and duties of the governing board.

There are currently five members of the OGCA Board. We may revisit this composition, and potentially look to add two more individuals to become a Board of seven.

Our role will be one of governance, closely ensuring our school is on track towards meeting the goals within our charter contract. This will involve reviewing academic, operational and financial data for our school and directing change appropriately. We will delegate to NHA the

daily operations for OGCA, confident in its ability to deliver the educational program we propose within this application.

4. Describe the founding board’s individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.

Our founding Board was brought together by Gerald McNair, who serves as our lead applicant. Mr. McNair has served for seven years on the board of RTCA, another NHA-partner school in Durham, and previously served on the board of Healthy Start Academy, one of the first charter schools in the state. Mr. McNair knows the ins and outs of charter governance and also the difference an academically strong school can make in the lives of students and throughout a community. Mr. McNair currently lives in Granville County and noticed that there were no schools on the popular I-85 corridor that connects Durham and Granville Counties. He recruited our other members with areas of expertise in curriculum, community engagement, and a commitment to developing young people. Our Board will hold the ultimate responsibility for the operations of OGCA and will hold NHA accountable for academic, organizational, and financial performance, as outlined throughout this application.

5. 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.

At various points, our Board members have been deeply involved in Durham County. While some of our members have changed residences, we maintain relationships and connections in the area to fully understand what needs and demands our school will address. We possess experience in business, legal, finance, operations, and management. These will serve us well as we consider important matters regarding the academic, operational, and fiscal outcomes of OGCA. Our relationships within the area will be a benefit to our school, allowing us to be even closer to families and community groups currently operating in the area.

Ensuring educational and operational success: It is clear to our Board that our role is govern OGCA and perform academically, operationally, and fiscally. We will maintain a steadfast focus on achieving our mission. We have taken and will continue to take the necessary steps to complete these tasks. This includes adopting necessary policies, implementing our school’s educational program, achieving our goals, and ensuring the school operates in a manner that is conducive to success. Our Board understands the importance of ongoing development. We hold ourselves accountable to constantly improve in our abilities to ensure our school is successful.

Evaluation of the school and the school leader (Principal): We will require our principal and NHA to provide the Board with regular reports on student performance, assessment data, operational data, and any parent survey data. A review of this data will be a standing agenda item for all Board meetings. We will use this information to analyze OGCA's progress towards our performance goals and performance of the principal. Under the provisions of our Services

Agreement with NHA, we maintain the authority to express reasonable dissatisfaction with the principal. Additionally, our contract with NHA allows us to terminate the entire partnership at any time if we decide that is in the best interest of the school. Should we opt to terminate the agreement with NHA (which no board has ever done in the 25-year history of the organization), we retain the right to lease the school building for the remainder of the current school year, as well as for one additional school year. Per-pupil funding will continue to flow to us to fund school operations independently. This allows us to transition management to another company or to become more of an operational board and contract for the individual services we need.

Involvement of key stakeholders: Parents are one of the most critical stakeholder groups to consider in the success of OGCA. The members of our Board are large proponents of school choice, including as board members of another charter school. Key stakeholders in the school and community will always be invited to attend our Board meetings, and we will actively solicit feedback from community groups. Our Board membership has the experience and ability to make meaningful contributions and effectively govern our school. Qualifications for current and future Board members include passion for challenging students through high expectations, enthusiasm for this school and commitment to our mission, dedication to our community, and willingness to give the time and energy needed to undertake this important venture.

6. 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?

Gerald McNair is a current Board member of RTCA and resides within close proximity of Gorman. Mr. McNair deeply understands this area, and as such sees the demand for additional school choice. His experience in charter school governance has provided guidance in seeking out the best possible candidates to open a successful new school in Gorman. He has reached out to individuals who share his understanding of our area, and who also have a passion for fostering a successful community.

We will seek to anticipate vacancies to the greatest extent possible, asking members to notify the Board President early in the year of their term expiration if they do not wish to renew their term. We will maintain a list of contacts and associates whom we want to ask to serve on the Board or who have expressed an interest in doing so, referring to this list whenever a vacancy may occur. Appointments to the Board to complete the terms of vacant seats will be made in accordance with our bylaws, and we will strive to ensure that an appropriate breadth of skills and experiences are represented by our membership, particularly in the areas of governance experience, education, and financial management.

7. Describe the group's ties to and/or knowledge of the target community.

Members of the Oak Grove Charter Academy Board of Directors volunteer their time at homeless shelters, attend church, and are actively involved in community events in Durham. Mr. Fountain is a retired law enforcement officer who has worked to understand gangs in Durham; Mr. Tabron lived in and worked in Durham for well over 25 years; and Mr. McNair belongs to a Christian businessmen association that ministers to African American men in Durham.

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

We intend for our Board to meet on a monthly basis. We may meet more frequently, as this may be especially necessary during our planning and start-up phase.

9. 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 benefit from training and development to ensure that we govern the school effectively and fulfill our mission. We will offer all members training to ensure effectiveness. This will include opportunities to use Board funds to support attendance at the National Charter Schools Conference and NHA's annual Board symposiums, and the annual conference and opportunities presented by the North Carolina Association for Public Charter Schools.

In addition, to support Board members' ongoing professional development, our Board will have access to a detailed suite of on-line learning modules maintained by NHA. These training assets help Board members understand a wide range of topics, including: roles and responsibilities; procedures; authorizer roles and responsibilities; the services and lease agreements; bylaws; executive sessions; public comment at meetings; and academic, operational, and financial data. Additionally, we will seek support and advice on governance training from national and local sources, our own legal counsel, and our own professional resources.

10. 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.

Ethical standards and conflicts of interest: Our Board is committed to overseeing OGCA with a dedication to ethical practices. NHA shares this view, and exhibits it in each of its partnerships. Our bylaws require all members to inform our Board of any actual or apparent conflict of interest related to any transaction considered by our Board. Conflicts of interest include transactions in which a member of our Board has a material financial interest, or with which the member is presently serving as a director, trustee, officer, or general partner of another party. These transactions may only be approved by a vote of the majority of members who do not have a conflict of interest. We have also conducted background checks on all Board members.

Existing conflicts of interest: Should our application be approved, we know of no known existing relationships that could pose an actual or perceived conflict of interest. Our Board has discussed the familial dynamics of two members, and as a body agree there is no conflict of interest.

Avoiding actual and perceived conflicts: Previously described, our bylaws dictate that members must inform the Board of any and all direct or indirect conflicts of interest related to any and all transactions considered by the Board. We will utilize our legal counsel to address any real or apparent conflict of interest, and we will request they provide support and advice as we review transactions for perceived conflicts of interest.

11. Explain the decision-making processes the board will use to develop school policies. We intend for our Board to be one of governance, holding ultimate authority for the school's academic and financial policies. As Board members, it is imperative for us to consider crucial questions, including:

- Are we in compliance with our school's charter?
- How well are our students learning and achieving?
- How well are we performing financially?
- Are parents involved in the school at an appropriate level?

We will use these guiding questions in designing our school policies. Through our partnership with NHA, we have access to school policies for schools currently in operation. These policies are aligned to state- and charter-specific requirements, and have been put in place, revised, and amended by governing boards and respective legal counsels. NHA's policies have previously met the requirements of North Carolina's Ready-to-Open process and allow us a guide and barometer as we design of our own. We will review, discuss, and modify as necessary once our charter is approved, and our policies will be shared at one of our Board's public meetings.

Our Board will adopt our policies in alignment with our mission and vision for OGCA. We will oversee them for compliance with applicable laws. At a minimum, we will annually review our policies with our independent legal counsel, and will take action on any required changes.

12. 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.

We do not currently plan to create any formal advisory bodies, councils, or associations to assist in governance. Should it become necessary, we will create committees to work as a function of our Board on specific topic areas and report back to the group during regular meetings.

Appendix G presents an organizational chart illustrating the structure of the school, including the relationship among the Board, NHA, the school leadership team (principal and deans), teachers, and other staff. The Board will oversee the school's management partner and, in collaboration with NHA, the principal. The principal will oversee the academic deans, each of whom will oversee a group of grade-level teachers. The principal also will oversee the administrative functions, headed by the school's registrar. Our Board and NHA will jointly employ teachers, as is permitted by law and previously recognized by OCS and the State Board of Education. The Board retains ultimate hiring and firing authority of teachers, as required by law.

Aligning with our desire for strong parental partnerships, we will work to assist in creating a parent organization for the school. We will ask this group to complement our mission in its work, and will ensure they have the needed policies, procedures, and practices to be compliant with law (including for fiscal management). Our parent organization will regularly report to our Board on fundraising efforts, fiscal management, leadership activities, and governance decisions.

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

Parent grievances: Our school will have an open atmosphere for parents, and make all reasonable attempts to appropriately address and respond to concerns shared by parents. Teachers will be

the first line of communication for parents and guardians to address any concerns. Teachers will respond to parent inquiries promptly, respectfully, and in accordance with established guidelines for handling parent grievances. If parents are dissatisfied with the response from their child's classroom teacher (or if the nature of the complaint does not involve a teacher), parents may contact a designated member of the school leadership team – a dean and then the principal – to arrange a meeting to discuss the concern.

On the rare occasion when speaking directly with a teacher or school leader does not resolve the concern, parents may bring the concern to the parent relations department at NHA, a unit dedicated specifically to help parents and guardians work with school leaders to address concerns and resolve conflicts. Parents will have several ways to report a concern, including: calling the department using a toll-free number, which is provided in the parent-student handbook and made available from the school's main office; reporting concerns using the "Contact Us" page of the NHA website; or by emailing NHA at its general contact email address (also listed in the handbook and available in the school's main office).

If these efforts do not resolve the issue, concerns may be brought to our Board. Parents may also contact the Board directly if they have concerns relating to a board policy or decision, if there is a suspected violation of laws or the terms of the charter, or if parents have concerns about the school management or operations. Concerns brought to the Board may be presented verbally or in writing and will be addressed at or before the next public meeting.

Employee grievances: We will adopt a process to help staff resolve concerns or grievances. The school's deans will be teachers' first line of communication for addressing concerns; concerns about deans shall be addressed to the principal. Staff may also contact a representative at NHA's Service Center. Employees also may use an employee hotline that lets them provide feedback anonymously, and such concerns are immediately escalated to the NHA Service Center for review, investigation, and resolution. In the rare event that staff cannot resolve a concern by speaking directly with school leaders, by communicating with an NHA representative, or by communicating through the hotline, staff may bring an unresolved concern to our Board.

We will create a working environment that allows administrators to make decisions sensitive to the demands of students, and we will determine staff structuring and restructuring based on skill and performance to best serve the needs of students. Employment is on an at-will basis, and teachers will be jointly employed by the Board and NHA. We believe our administrators should be able to identify and support or terminate ineffective staff as appropriate, and that is how our school will be structured. Policies and procedures will be defined and put in place to handle unacceptable performance by teachers or school leaders, and in the event that performance is unacceptable and depending on the particular circumstances, discipline may occur. Discipline may include a warning, creation of a performance coaching plan or performance improvement plan, suspension, or administrative leave. Employees will receive additional coaching when necessary because we want all employees to grow and succeed. If a teacher does not meet performance expectations or if there is a significant violation of policies or procedures, however, termination of employment may be recommended to the Board.

**\*Attach Appendix G Organizational Chart**

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).

**\*Attach Appendix H Charter School Board Member Information Form and Resume**

A **one-page** resume from each founding board member and responses to the questions found on the Charter School Board Member Form

**\*Attach Appendix I Charter School Board Member Background Certification Statement and Completed Background Check for Each Board Member**

**\*Attach Appendix J Proposed By-Laws of the Nonprofit Organization or Municipality**

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.

**\*Attach Appendix K Articles of Incorporation or Municipal Charter**

If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.

If the applicant is a municipality, attach a copy of the municipal charter.

### 3.4 Staffing Plans, Hiring, and Management

#### Projected Staff

- Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

Position	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Principal	1.0	1.0	1.0	1.0	1.0	1.0
Dean(s)	2.0	2.0	3.0	3.0	3.0	3.0
Office Staff (registrar, office administrator, admissions representative)	3.0	3.0	3.0	3.0	3.0	3.0
Core Classroom Teachers		19.0	22.0	25.0	28.0	28.0
Specialized Classroom Teachers (special education, ELL, specials)		9.0	10.0	11.0	13.0	13.0
Student Support Positions (behavior specialist, social workers, etc.)		1.8	1.9	2.0	2.0	2.0
Interventionists		6.0	6.0	6.0	7.0	7.0
Substitute Teachers		1.0	1.2	1.3	1.5	1.5
Teaching Aides or Assistants		2.6	3.5	4.4	5.3	5.3
School Operations Support Staff (recess aides)		0.8	0.9	0.9	1.0	1.0

#### Staffing Plans, Hiring, and Management

- Explain the board's strategy for recruiting and retaining high-performing teachers. We will prioritize the recruitment and retention of high-performing teachers who will deliver quality instruction to our students. By partnering with NHA, we are implementing its nearly 25 years of talent acquisition experience.

**Recruiting:** NHA has a documented record of success when it comes to recruiting and hiring talent. We will benefit from NHA's strong candidate network and recruiting capabilities. NHA currently works to staff 88 partner schools across nine states. NHA will work with our Board to leverage our local knowledge and connections for additional support. Included in NHA's recruiting strategies are the following:

- Traditional:* NHA employs traditional and digital marketing strategies to search for and screen potential staff. This includes job and university career fairs, social media, advertising, and referrals. Our outreach will span local markets, online, and across the NHA network.
- Campus relationships:* NHA has established relationships and partnerships with colleges and universities across North Carolina. These connections will help our school create pipelines for teacher candidates, allowing our school early opportunities to network with high-performing student teachers and graduates.

- *Career fairs and conferences:* Our partnership with NHA will include having recruiters present at career fairs and events locally, regionally, and nationally. This provides us with an additional opportunity to meet new graduates and teachers in transition who may be high-performing staff at OGCA.
- *Referral networks:* Referrals are often the best way to hire known high-performing staff. We anticipate receiving referrals for new teachers from across the 13 NHA-partner schools in North Carolina, as well as from the other partner schools nationwide.

NHA’s dedicated hiring team analyzes current trends with regard to supply and demand for teachers. More specifically, it spends dedicated time and resources working to understand this in our area in anticipation of understanding existing and potential hiring needs.

Retaining: NHA’s organizational design has put in place the necessary systems and procedures to prepare, develop, motivate, engage, reward, and ultimately retain school staff. Our school will implement a “Total Rewards” compensation model to provide staff with both a desirable benefits package and chance for merit-based salary increases (for those who have a high impact on student learning/achievement). Included within our proposed budget is teacher pay above market for openings that can be hard to fill (ex: EC and EL teachers). Our health plan offerings are competitive, with low employee-cost options, retirement choices (including an employer-match), life insurance, tuition reimbursement, and employee acknowledgement and reward programs.

3. If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader.

We have not yet identified a principal for OGCA, but we seek a candidate who embraces our mission. This will be the foundation as to build the appropriate climate and culture for OGCA.

Our principal will be dedicated to fulfilling our mission. He or she must hold the unwavering belief that all children can and will learn. Qualified applicants will have a record of achieving significant student performance growth. Strong leadership and management skills and the ability to provide instructional support to teachers is required. The principal must be committed to and capable of developing school culture, promoting student achievement, and implementing school operations. Among the numerous responsibilities are:

- demonstrating and modeling all aspects of the school-wide framework;
- evaluating the educational program for conformance to state, federal, Board, and NHA standards;
- collaborating with our Board on hiring and evaluating teachers;
- implementing tools for parent and community communication;
- reporting school activities and academic achievement to our Board regularly;

- establishing school procedures and systems; and (but not limited to),
- monitoring the use of data in lesson planning and evaluating student academic growth.

Principal candidates will have a bachelor's degree (master's degree preferred) and three or more year's related experience and/or training or equivalent combination of education and experience. They will demonstrate exceptional language skills, mathematical skills, reasoning ability, and interpersonal skills and possess all administrative licensure as required by law.

**Attach in Appendix O the School Leader's Resume. If school leader has been identified, include the school leader's one-page resume in Appendix O.**

4. Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.

Teachers at OGCA will be employed jointly, by both our Board and NHA. Our school leaders and additional school staff will be solely employed by NHA. The full employment relationship is detailed within our Board's Services Agreement with NHA). We will mandate NHA to seek out candidates for teaching positions who meet requirements for state credentialing and recommend them to our principal and our Board. We will then consider and act upon their potential employment. Our principal and NHA will be accountable for student learning, and we maintain the authority to share any dissatisfaction with our school principal. Our Board commits to offering NHA and the principal appropriate time to resolve any deficiencies, but we reserve the right to direct NHA to terminate our principal if improvements are not made.

It is our understanding that this arrangement was reviewed and approved by legal counsel for the Department of Public Instruction in 2012. It was also found that the structure complies with applicable state law. We will benefit from being able to leverage NHA's full-service and proven systems to provide employee benefits, payroll, employment compliance documentation, retirement programs, and additional functions related to human resources. This arrangement is utilized within other NHA-partner schools located in the state, including WFCA, which we are proposing to replicate.

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

We intend to adopt a background check policy for OGCA. Together with NHA, we will be an equal opportunity employer. NHA will offer its expertise in overseeing many licensure and compliance functions for our school.

We have previously noted that teachers will be jointly employed by both our Board and NHA. Our hiring process will include practices requiring NHA and the principal to recommend teaching candidates to our Board. Related to school leaders, our Board and NHA will work together to select personnel for school leadership positions.

Dismissing personnel: Employees at OGCA will be at-will. We will foster a climate and culture allowing school leadership to make decisions based on student needs, including identifying ineffective staff, providing additional structures and support, or dismissing their employment.

Should employee performance not be acceptable, and depending on circumstance of an incident(s), appropriate disciplinary measures may be taken. This can include: warnings, coaching/performance improvement plans, suspension, and administrative leave. If these interventions and supports do not yield increased employee performance, or if a substantial violation of policies/procedures takes place, termination is an option. Our Board will receive all recommendations for termination of a teacher and we will consider and act accordingly. We will provide details on corrective actions and termination processes within our Employee Handbook. This handbook will be given to all employees on or before the first day of employment.

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

Our budget included provides insight on proposed salaries for school staff.

Guidelines for teacher compensation will be adopted to differentiate pay according to market rates and performance. Starting salaries align with the weighted average of districts that surround our school, making certain that base compensation is competitive. Salaries will match the local market for the initial three years of employment, with merit increases beginning in their fourth year with OGCA. Teachers with a masters' degree are eligible for a salary premium as well. Our compensation strategy in tandem with a generous benefits offering, coaching and support to grow, and a respectful and professional working environment, will make accepting a position at our school an attractive opportunity for teachers and staff.

We have designed a salary range aligned with teacher pay increases in our local area and statewide. The range for core content teachers is \$42,000 to \$52,500, and we have used an average of \$47,100 to plan financially.

Our school will hold staff accountable for the success of students, using academic growth and proficiency. Our merit-based approach will be utilized to appropriately acknowledge teachers' success. NHA-partner schools employ a "Total Rewards" compensation structure, and we propose to do the same, benefitting from their tools to reward staff who have a tremendous impact on student learning and achievement. The Total Reward program includes: market increases for the first three years of teaching and merit-based salary increases moving forward; competitive and low-cost health insurance choices and plans; control of a 401(k) retirement plan (traditional and Roth) with an employer-match component; life insurance; tuition reimbursement; loan forgiveness; and, employee recognition and reward programs.

7. Provide the procedures for handling employee grievances and/or termination.

Our school will adopt a practice to appropriately respond to employee grievances. As noted above, our deans will serve as the first line of communications for teachers and then concerns may be brought to the principal or the NHA Service Center. In the rare situation where concerns are not solved using any of these options, staff may then bring their grievance to our Board.

Employees at OGCA will serve the school at-will. Our teachers will be jointly employed by both our Board and NHA. Our school leaders will create the staff structure according to strengths and

expertise, performance, as well as how to best serve the needs of our students. Structures will be put into place for ineffective staff, including for termination as appropriate.

Should the performance of a staff member prove unacceptable, and depending on the degree, circumstances, and nature of incident(s), appropriate disciplinary actions may take place. This can include warnings, creation of performance coaching or improvement plans, suspensions, or administrative leave. Should an employee not meet performance expectations following appropriate interventions, or if a significant violation of policies/procedures, termination of the employee may take place. Our Board must review all recommendations for termination and take action accordingly. OGCA's Employee Handbook, given to all employees prior to or on their first day of employment, includes information on corrective-action and termination.

8. Identify any positions that will have dual responsibilities and the funding source for each position.

We do not envision or expect any positions at our school to have dual responsibilities within or outside of the school. If we find there is a need for a position with such responsibilities within our school, we will make certain that the position is funded appropriately, accounting is accurate, and all compliance is met. One example may be a social worker funded from our general budget who also serves exceptional children through EC funding.

9. Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students.

We will recruit licensed EC teachers to offer high-quality instruction for exceptional children. Additional staff members will be employed to provide support and our school will hire or contract with an occupational and/or physical therapist, school psychologist, speech therapist, and social worker to meet the needs of all students who choose to enroll with us. We will ensure we comply with credentialing requirements and will annually examine the need for additional staff to provide services for gifted, EL, and EC students.

In our first year projected budget, we have included funding for OGCA full-time equivalent (FTE) staff to serve the needs of exceptional children. Upon full enrollment, we anticipate having 6.0 FTE EC teachers, 5.25 FTE EC aides, and 0.50 FTE social worker. We also intend to begin with a 2.0 FTE EL teacher, growing to 3.0 FTE, and will adjust based on student needs.

10. Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).

Our Services Agreement with NHA specifically outlines that our Board will jointly employ teachers with NHA, and NHA will employ the administrative and non-teaching staff at OGCA.

Principal: As noted above, the principal of OGCA will be dedicated to meeting the mission and vision we have for our school. Qualified candidates will have a documented record of achieving significant student growth. Additional requirements include strong leadership and management skills, as well as the ability to offer instructional support for teachers. Our principal must be committed to cultivating and fostering a school culture, promoting student achievement, and

implementing our school's operations. Candidates for our principalship must have a bachelor's degree (master's degree preferred) and three or more years related experience and/or training or equivalent combination of education and experience. They must demonstrate exceptional language and math skills, reasoning ability, and interpersonal skills. Candidates must also possess all required administrative licensure.

Deans: Deans at OGCA will share administrative responsibilities with our principal, and have primary responsibility for:

- mastering/modeling all aspects of the classroom framework;
- building relationships with/among teachers and investing in the success of all staff members;
- coaching teachers on the path to instructional mastery;
- holding teachers accountable to college readiness through development and training;
- analyzing student/grade-level cohort data and using that to drive instruction, growth, and professional development; and,
- ensuring OGCA/NHA procedures are promoted, modeled, and reinforced.

Dean candidates must have a bachelor's degree and a minimum of three years of experience in teaching or administration or an equivalent combination of education and experience. They will possess administrative licensure as required by law and will maintain superior language and math skills, reasoning ability, and will demonstrate an effective collaborative approach to mentoring and developing direct reports.

Teachers: Teachers will possess the ability to:

- communicate/work effectively with parents and families;
- adjust teaching style and pace according to students' specific needs;
- modify according to differences/changes in traits of students, programs, leadership, staff and our community;
- implement varied teaching methodologies to meet students' personalized learning styles;
- analyze tests/measurements of achievement; and (but not limited to),
- work effectively as a member of our team.

Our teachers will be responsible to demonstrate abilities to implement the curriculum with responsibilities for:

- coordinating with educational associates;
- maintaining current achievement level data;
- working with students below and above expected academic achievement;
- recording accurate student records;
- establishing classroom management;
- ordering supplementary education materials;
- seeking parent volunteers; and (but not limited to),
- reporting all education-related activities to our principal.

Teachers must possess a bachelor's degree, meet state credentialing requirements, and have appropriate teaching licensure as required by law. EL and EC teachers and aides will also possess knowledge regarding education strategies and approaches particularly suited to the student populations they serve (and be appropriately certified).

### 3.5 Staff Evaluations and Professional Development

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

The NHA credentialing team will house and manage teacher licensure/professional development compliance and appropriate reporting. NHA will present this information to our Board and other entities (as required).

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 and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.

OGCA will implement the NHA-partner school model. NHA has a robust and successful staff development structure that attracts, prepares, and retains high-quality personnel.

Mentor: We will assign new teachers a mentor teacher that addresses daily questions and concerns. They will have scheduled meetings with these mentors in order to offer ongoing support in areas including curriculum, instructional practice, and classroom management. New teachers will be observed by mentors periodically in their classrooms, and mentors will provide direct feedback after each visit to improve instruction and management. Our new teachers will also take part in the North Carolina Beginning Teacher Support Program.

Retain: Many factors support the retention of high-quality instructional staff, including:

- Frequent excellent coaching on instructional practice.
- Detailed professional development plans and individual commitment.
- Intentional tracking of high-performing teachers to positions entailing more responsibility (ex: mentors, content leaders, deans, and outstanding deans trained to become principals).
- NHA's "Total Rewards" approach to compensations (including performance-based raises).
- An environment promoting scholarly learning and a culture of building-wide respect for all students and staff.

Evaluate: Quantitative and qualitative measures will be utilized to evaluate teacher performance in accordance with applicable law and policy. OGCA will implement a pay-for-performance compensation structure, using NHA's internally developed evaluation tool, as well as student achievement, to measure performance.

Our teacher evaluation system will be comprised of the classroom framework described above and:

- *Professional accountabilities:* Teacher embodies expectations of professional accountabilities through dependability, dedication, communication, and teamwork.
- *Quality of student learning:* Teacher achieves expected performance in academic proficiency and growth as measured by state tests. Makes satisfactory progress toward necessary growth expectations on formative assessments.

Deans will formally evaluate teachers annually with data from regular coaching sessions throughout the year. A combination of regular observations, coaching, mid-year check-in, and year-end evaluations help structure professional development goals for each teacher and form the basis for teacher evaluations.

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.

Our school will support high-quality instruction through clear expectations, regular observations and feedback, and an intentional focus on developing teaching practices. We will implement professional development across our school culture. This begins with a rigorous orientation and training period prior to our school's opening. Additional training will be a priority, and will be incorporated as an intentional of our academic calendar. This includes the following:

- Formal training sessions.
- Mentor teachers for new teachers.
- Regular coaching/feedback sessions.
- Creations of professional learning communities.
- Daily time for common grade-level planning.
- Weekly grade-level team meetings with deans to support a mutual approach to instruction.
- Grade-level and cross-grade-level team meetings scheduled for teachers to collaborate on increasing student learning and achievement.

Our teachers will have access to an array of learning opportunities due to our partnership with NHA. This includes conferences, video libraries, web-based resources, e-learning, and dedicated curriculum and instruction specialists.

Effective implementation: School leaders will lead efforts to determine professional development needs. They will work with NHA to design a customized plan based on those needs. Our school leadership will annually complete a comprehensive assessment of the educational program and operations of OGCA. Teachers will then develop a School Improvement Plan (SIP), analyzing student achievement, the school environment, the teacher and parent communities, and the administration. Our SIP will offer a strategic plan to fulfill needs, and both individualized and school-wide professional development efforts will be utilized to meet noted needs.

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.

Before school opening: All new teachers employed ahead of the start of the school year will take part in New Teacher Summit (NTS). This program takes place over multiple days and is designed to immerse teachers into OGCA's mission and vision. They will also receive training on specific curricular and instructional needs. This development is actively supplemented with continuous coaching and additional training over the course of the school year.

As a part of NTS, school staff will learn why practices are effective and see their impact in daily activities including classroom management and instructional planning. Staff will understand these principles in a classroom setting and as they exist throughout the entire school. New teachers will be empowered to being applying these practices as soon as they enter OGCA. A sample agenda during NTS includes the following: classroom culture; purpose and vision; Behave with Care; curriculum and curricular tools; and, grade-level best practices.

Our new teachers and leaders will start to form our school culture by learning the practices needed to connect with students, establish expected behaviors and routines, and manage classrooms. NTS concentrates on creating a positive and proactive culture and self-management of classrooms by training teachers how to master the following:

- Structure the classroom in a manner that promotes responsible student behavior.
- Engage students in cultivating school culture.
- Intentionally develop strong positive relationships with students.
- Clearly teach students how to act responsibly in all classroom situations.
- Invest additional time, attention, and energy to value responsible behavior than to respond to acts of misbehavior.
- Pre-plan responses to misbehavior to make certain they are brief, calm, and delivered in a consistent way.

Our new teachers and leaders will learn the tenets of effective instruction and the strategies utilized to enhance learning in each of the core content areas. All grade-level teachers will receive specific training covering the use of the pieces of curricular tools.

NTS participants will be able to interact with and receive instruction from other master teachers in their specific content area/grade level. These sessions focus on developing plans for classroom management, analyzing OGCA's moral focus curriculum, reviewing high-quality instructional practices, and collaborating on practical ideas for working with different student groups. EC and EL teachers are included in this, and they will be trained in related topics by master EC and EL teachers, as well as area experts from NHA.

Ongoing opportunities: Additional school-based staff training will take place in the days leading up to the first day of school. This training supplements what staff learns in NTS, and will communicate additional expectations, including non-instructional practices and procedures. This provides staff the chance to conduct grade-level planning with peers, deepened knowledge

around core concepts related to common assessments, building relationships with students, classroom management, and school-wide behavior support systems. Our professional development offerings will not be limited to, as we strive to provide our staff with the best training that ultimately results in high student achievement.

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.

Professional development opportunities for staff will be included within our annual calendar, daily schedule, and organizational structure. Teachers and school leaders also will take part in opportunities over the summer, including extensive preparation ahead the initial school year.

We previously discussed that our staff will go through New Teacher Summit and NHA's Leadership Summit. These are collaborative and intensive trainings over the course of a week that brings together peers from the other 88 partner schools. We plan to have 13 days scheduled for professional development during the school year. These will also include time to focus on EC and EL students. We will also build in 45 daily minutes of planning time for each classroom teacher. At least weekly, there will be meetings for grade-level teams, and 30 minutes of planning periods each week will be set aside for individual teachers' one-on-one meeting with his or her assigned dean. This allows for coaching, feedback, and development. Our school leaders will hold full staff meetings. Teaching staff schedules will be created that allow for cooperative and collaborative meetings with parents.

Our staffing structure works well with the daily calendar in allowing core-subject teachers individual and common planning time. This is scheduled to take place while students receive instruction in our "specials." Specials include art, physical education, music, library and technology, among other areas. Professional learning communities will be created to support collaboration among peers and allow common grade-level planning to take place. In groups, teachers will analyze the current week's lesson plans and schedule lessons with common delivery and alignment to OGCA's curriculum. Our intention is to build a calendar and staff structure that allows for regular grade and cross-grade level team meetings. This will allow teachers to share best practices for increasing student learning and achievement.

We will place an emphasis on offering extensive professional development and training opportunities focused on instruction and serving students with special needs, including EC, EL, and at-risk students. Our staff will also take part in regional trainings offered by NCDPI.

### 3.6 Marketing, Recruitment, and Enrollment

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 115C-218.45 carefully.

#### Marketing Plan

1. 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)).

Our school does not intend to target or serve a specific population. We will implement marketing and outreach plans to work towards full enrollment, achieve an extensive awareness throughout the Durham County area, and make certain that OGCA is a strong part of the local community. We will market to all families, and our goal will be to attract a student population that reflects the demographics of the local school district. A combination of our Board members' knowledge of the community and NHA's expertise and experience with outreach will create the foundation of our marketing efforts. We will team to analyze the interest of prospective families through diverse focus groups in the community, polls or surveys of public opinion, and more. These efforts will offer us perceptions of the area, understand educational needs not currently being met, and measure how attractive OGCA is to members of the community.

Upon receiving notice of a recommendation for approval, we will begin to intensify our marketing efforts, as described in more detail in the questions below. Representatives of OGCA will hold monthly enrollment information meetings for families. These will be promoted through an array of channels, including digital marketing, direct mail, and grassroots efforts to area neighborhoods. Families will learn about the school's mission, design, and educational program. They will also have the chance to ask questions and become familiar with school representatives. Their feedback will be crucial and will help us add to the offerings at our school.

Families who decide to enroll their student with us will be invited to additional parent information meetings to hear details about our educational program, meet our school leaders and staff, learn about the moral focus curriculum, and hear how they can take an active role in their student's education. There will be a social component during these meetings to encourage parents to collaborate with us in designing a strong school community well before our first day.

2. Describe how parents and other members of the community will be informed about the school.

Communication with parents before opening: Strong parental involvement often is the result of effective and robust school-to-home communication. Our school is committed to maintaining an atmosphere of open dialogue between parents and school leaders and teachers, and we will begin these partnerships as early as possible in the life of the school. As soon as we are notified of the approval of our application, we will begin building relationships with parents and informing

them of our mission. Families will be contacted through a variety of practical methods to inform them about our school, the enrollment process, and how they can become involved in the school.

Methods such as a monthly newsletter, website, and Facebook page will keep interested families aware of and connected to the latest happenings of the school as it prepares to open. Social media websites will be used to help form and maintain connections between school leaders and parents. While our school is being constructed, a temporary school office will be available on or very near the school site as a point of contact with staff for the school's prospective parents. This pre-opening rapport with prospective parents will peak with a family orientation held at the end of the summer to allow enrolled students and their families to meet the principal, the student's teacher and classmates, and other school staff.

Engaging parents: Parents will have two opportunities each year, including our first year, to complete a survey called "Voice of the Parent." This survey will be designed to ensure that parents' expectations and students' needs are understood and are being met. Voice of the Parent is designed to systematically drive action and accountability so that we remain parent, student, and community-focused. These surveys will be confidential, and the feedback received will be compiled into summary statistics for use at the school leadership and Board levels.

To encourage parents' presence and active involvement, our school will include a dedicated parent room. This room will give parents a place to gather and build relationships with one another, discuss matters of mutual interest, and take ownership in the school. Parents will have access to Parent Portal, an online student information platform developed by NHA. Our school will actively engage parents in their children's learning. Prior to each school year, we will make parents and each student aware of grade-level performance expectations. Student progress against those goals will be communicated to parents regularly through direct teacher communication, progress reports, report cards, and parent-teacher conferences.

Parents also will be encouraged to help form clubs or groups to support extracurricular or school-time activities in the building. We will facilitate the formation of a parent organization at our school. Our Board will expect that the parent organization support our mission and student body in all it does and will report to the Board frequently on the organization's initiatives. We will ensure that our parent organization has the necessary policies and procedures in place to stay in compliance with law, including those necessary for sound financial management.

3. Describe your plan to recruit students during the planning year, including the strategies, activities, events, and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.

As soon as we are notified of the approval of our charter application, our Board and NHA will continue to build our community relationships and develop direct relationships with parents. We will contact families in a variety of ways to inform them about our school's mission, the enrollment process, and how they can become involved in the school. Any combination of radio ads, television ads, billboards, bus ads, and other paid media options will be used to spread the word about the school to parents throughout the community. Families also will receive flyers in

the mail, invitations to participate in parent informational meetings, and notices of “meet-and-greet” sessions with the principal and other school representatives.

A monthly newsletter, our school website, and our Facebook page will keep interested families aware of and connected to the latest events at the school as it prepares to open. Social media websites will be used to help form and maintain connections between school leaders and parents. Even while the facilities are being prepared for occupancy, a temporary school office will be established where the principal and school staff can be contacted, and prospective parents can seek more information. During the months before the school opens, school staff and parents will initiate the relationships that will strengthen and grow throughout our school community.

A dedicated local representative with strong community knowledge will be hired (at NHA’s expense) before the opening of the school. This specialist will leverage the Board’s knowledge and lead grassroots marketing and the building of community relationships including outreach to: area daycare suppliers; local chambers of commerce and other community businesses; area churches, temples, and other houses of worship; HeadStart and other community educational programs; and Boys/Girls Clubs, YMCAs, and other youth activity centers.

We have proposed an enrollment goal of 520 students for our first year of operations in order to provide enough seats to serve any student who wishes to attend. We have confidence in setting a high benchmark early, in part due to the benefits of our partnership with NHA. Our Board has deep roots and relationships in our community. Outreach through those networks has already begun and will be elevated once approval has been granted. Word of mouth is a strong marketing strategy we will utilize, particularly because trust is important to our community. In addition, we will be hiring an admissions coordinator with strong familiarity of our community to work closely with our Board to provide outreach.

We have vetted NHA and know that it has nearly 25 years of experience successfully serving students in schools similar in size. While we are confident we will meet our goal, the arrangement of our Services Agreement guarantees OGCA to be operationally and financially viable regardless of whether or not we meet the 520 enrollment mark. NHA is obligated to provide the entire educational program irrespective of student enrollment and we do not have to enroll the school to a certain level to guarantee this partnership.

NHA’s experience with enrollment in communities has allowed the organization to study historical trends when assisting us in forecasting our goals. Based on our analysis of the area, we expect to receive over 1,000 applications for the 520 seats we propose to offer.

NHA’s marketing team will also be using other metrics to measure if we are on track to meeting our goal of 520 students in the first academic year. We will begin social media and digital advertising, and traditional media which could include television, radio, and billboards. Our analysis predicts that through these efforts we will receive somewhere around 500 leads/letters of intent prior to opening enrollment for applications (50 percent of our total forecasted applications).

4. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

As needed, multilingual representatives speaking the most prevalent home languages will be available at our parent information meetings to make sure we are able to converse with as many families as possible in their home language. Prior to these meetings, we will distribute information in the prevalent languages to area organizations that provide services to EL families.

We will also host events specially designed for parents of students with special needs to provide a forum allowing these families to learn more about the school's services for EC students. These meetings will be an open dialogue, sharing information with parents about our school, but also hearing from parents about matters important to them.

Parents interested in enrolling their children will be invited to special parent information meetings to learn more detail about the curriculum, meet the principal and teachers, obtain information about the school's moral focus program, and learn how they can take an active role in their child's education. These meetings will also have a social component to encourage parents to come together to help us develop a vibrant school community even before the start of school.

5. What established community organizations would you target for marketing and recruitment?

An admissions representative with longstanding connections and relationships within our community will be hired to help inform families of OGCA. Their role will entail marketing the school across Gorman, Durham County, and the greater community. Examples of their day-to-day responsibilities include: outreach to daycare providers, local chambers of commerce, community businesses, area churches, temples, and other houses of worship, HeadStart and other community education programs, and youth activity centers.

### 3.7 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.

Parental partnership is among the four pillars that form the foundation of OGCA. In order to achieve this, we will have a high level of effective and robust school-to-home-communication. We are committed to fostering an environment that promotes open dialogue between parents and school leaders and teachers. Upon receiving notice that our application for a new school is approved, we will cultivate these relationships and inform them of our mission. Families will receive communication and updates through an array of methods to inform them of our school, how enrollment will take place, and how they can become involved in the school.

We intend to utilize a monthly newsletter, school website, and social media to keep interested families apprised of the latest events of our school as it gets closer to opening. Social media will be used to help form and maintain connections between school leaders and parents. We will have

a temporary office open either on or nearby our school property as NHA constructs our school facility. This will allow for an additional point of contact for families with staff. Efforts to build relationships prior to opening will culminate with a family orientation held at the end of summer. This will offer families a chance to meet school leadership, teachers, staff, and peers.

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.

As noted above, we will provide parents an opportunity each year, including during our first, to respond to a survey called “Voice of the Parent.” This chance to provide feedback is designed to make sure our school understands the expectations of families and is meeting them. The survey is used to maintain our focus on students, parents, and the community. Survey responses, which remain confidential, are compiled into summary statistics for use by school leaders and the Board.

We will encourage parents to be present and involved in OGCA and will construct a dedicated parent room. This offers parents a location to gather and cultivate relationships with one another, discuss important topics and interests, and generally be involved in their school.

3. If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.

Extracurricular or school-time activities will be encouraged by our Board and school leadership. We will welcome parents who wish to form clubs or groups, and we expect to facilitate the formation of a parent organization. Working together, we expect that this parent organization will support the mission we set for the school in its planning and activities. We will request reports from the organization frequently and will ensure that the parent organization remains in compliance with all requirements, including sound fiscal management.

### 3.8 Admissions Policy

1. Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:
  - a. 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.
  - b. Clear policies and procedures detailing the open enrollment lottery plan, including policies regarding statutory permitted student enrollment preferences.
  - c. Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.
  - d. Explanation of the purpose of any pre-admission activities (if any) for students or parents.
  - e. Clear policies and procedures for student withdrawals and transfers.

OGCA will comply with all applicable state and federal laws for admissions. We will not discriminate on the basis of intellectual or athletic abilities, measures of achievement or aptitude, disability, status as a handicapped person, homeless status, English proficiency, religion, creed, race, color, national origin, or any other basis that would be illegal for a public school.

Open Enrollment Period (OEP): If our application is approved for a charter, we will establish an OEP for the first year of operation prior to June 30 and will publish a notice of open enrollment. Our OEP will be no less than 30 calendar days. During a public meeting, we will confirm the notice of the OEP and the application process, a process designed to ensure that people most likely to be interested in the school are informed. NHA will widely share the OEP notice on our Board's behalf.

Applications and lottery: We will begin accepting applications for the school year on the first day of the established OEP. If we receive more applications during this period than the offered seats of any grade level, a random selection process will be utilized. Should we receive fewer applications than offered seats in every grade level, all eligible applicants will be accepted.

Applications received after the OEP will not be eligible to participate in the random selection process. Should there be open seats, late applications will be added to the end of our accepted list in the order in which we received them. If no seats are available, late applications will be added to the end of the waiting list or, if a late application is entitled to preference, inserted in the waiting list immediately before all applicants on the waiting list with a lower enrollment-preference category.

A list with the name of each student who submitted an application during the OEP will be created with the student's name, birth date, grade level, street address, and names and grade levels of any siblings who are also applying for admission. From this list, an electronic card will be created for entry into the random selection process. If siblings apply for the same school year, one surname card will be entered into the random selection process to represent all of the siblings applying at the same time. If that surname card is selected, then all of the siblings shall be

admitted, except that siblings who are not multiple birth siblings may be admitted only to the extent that space is available and does not exceed the grade-level capacity. If a card is drawn and there is no space available in the appropriate grade, applicants will be placed on the waiting list in the order in which they are drawn. After the random selection process is complete, late applications will be processed in accordance with the procedures above.

When a seat becomes available in a particular grade due to attrition, erosion, or other event, that available seat will be offered to the first student on the waiting list for that particular grade.

ReEnrollment: Students enrolled in the school will be eligible to reenroll for successive years without entering the random selection process. All applicants on a waiting list must re-submit an application for the following school year to be eligible for enrollment.

Preferences: Once a student has attended the school, he or she will be given first preference to enroll for the subsequent school year. Children of members of our Board and children of the school's full-time employees also will be granted preference. After that, preference will be given to siblings of students reenrolling at the school.

Withdrawals/transfers: When a student withdraws, that creates an open seat to be filled by another student through the waiting list process outlined above. Students wishing to legally transfer into the school mid-year may submit a late application, which will be processed as outlined above.

#### Weighted Lottery

\*Does your school plan to use a weighted lottery?  Yes. Complete the following section.  
 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.

Our school is not planning to utilize a weighted lottery.

2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.

Our school is not planning to utilize a weighted lottery.

3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.

Our school is not planning to utilize a weighted lottery.

### Certify

This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.  Yes  No

Explanation (optional): As noted, our application was prepared in partnership with NHA. As such, our Board understands much of the language regarding practices, procedures, and systems will be similar to applications of other schools that have chosen to engage NHA as their management partner.

## Section 4 Operations

### 4.1 Transportation Plan

1. Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal.

If you plan to provide transportation, include the following:

- a. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
- b. Describe how the school will transport students with special transportation needs and how that will impact your budget.
- c. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services.

OGCA will strive to ensure that our school is accessible to all students and that transportation needs are not a barrier to any child attending the school. We do not plan to provide bus transportation to the general student population. However, we will offer parents and guardians resources and support to coordinate their transportation needs, and we will provide transportation as required by any individual student's IEP, 504 plan, status as a student experiencing homelessness, or other applicable law. We plan to give students community experiences through field trips. When opportunities arise for students to supplement classroom learning with field trips, we will contract for appropriate transportation as needed.

A successful school requires parents' partnership and dedication. NHA-partner schools have benefited from collaborating with parents on transportation needs. School teachers, administrators, and staff greet students and parents during morning drop-off and afternoon pick-up. This routine offers students a transition between school and home that is comforting, safe, smooth, and welcoming. Students arrive at school more focused on the day's activities and with less anxiety and distraction than school bus rides can create. This approach also will give staff an additional point of contact with parents and will give parents an additional opportunity to become a part of the day-to-day life of the school. This approach works well at NHA's other partner schools in North Carolina. Our school will implement a software program called Driveline to facilitate the process when parents arrive to pick-up their student. This system allows students to stay in the classroom until their parent or guardian is on the school property. Classrooms then receive a non-disruptive notification when a specific student's parent or guardian is ready for pick-up. This system keeps students safe and manages traffic efficiently.

We recognize that this plan may not be a viable option for every family. Before the first day of school, during an orientation program for families, we will work with parents to address and coordinate their needs to ensure that transportation is not a barrier to any child attending OGCA.

#### 4.2 School Lunch Plan

1. 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.

If the school intends to participate in the National School Lunch Program, include the following components in the response:

- a. How the school will comply with applicable local, state, and federal guidelines and regulations;
- b. Any plans to meet the needs of low-income students; and
- c. Include how the school intends to collect free and reduced-price lunch information from qualified families. If a school intends to participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.

OGCA will create an appropriate school meals program, and no student will lack a daily meal. As part of the daily attendance process, teachers will ask each child if he or she needs a lunch or if one was brought from home, entering the information in the student data system. If a student does not qualify for free meals or does not have enough money in his or her lunch account to buy a meal, the teacher will notify the office so a lunch still will be provided to that student. If needed, OGCA will maintain a discretionary account to ensure that each student has lunch daily.

On behalf of our school, NHA will contract with a food-service provider to operate our program, following U.S. Department of Agriculture (USDA) procurement requirements and complying with Federal Regulation 7 CFR 210.16 and other applicable law. A hot meal for lunch will be offered daily, and a cold breakfast will be offered if needed. Students will pay a set price for school meals unless they qualify for free or reduced-price meals under the National School Lunch Program. NHA has experience in handling all the required aspects of these programs, and we will hold NHA accountable to ensure the efficient management of our school's breakfast and lunch programs. As necessary, we will look to the North Carolina Department of School Nutrition Services for resources in overseeing the compliance of our food-service program.

All meals will meet USDA nutritional requirements. Our food-service provider will provide extensive support to the school with menu planning, nutritional analysis, food-handling safety, and sanitization. We recognize the importance of providing healthy meals to our students, and our goal is to allow students to focus on the work of learning and not on their physical hunger.

### 4.3 Civil Liability and Insurance

The Nonprofit 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 NC General Statute, Workers' Compensation Law.

1. Complete the table below, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Area of Proposed Coverage	Proposed Amount of Coverage	Cost (Quote)
Comprehensive General Liability	\$1,000,000.00/occurrence	\$2,300.00
Officers and Directors/Errors and Omissions	\$1,000,000.00/occurrence	\$2,454.00
Property Insurance		\$400.00
Automobile Liability	\$1,000,000.00/occurrence	\$145.00
Crime Coverage Minimum/Maximum Amount	\$250,000.00   \$250,000.00	\$1.00
Worker's Compensation	\$500,000	\$500.00
Other Coverage	Student med pay	\$1,000.00
<b>Total Cost</b>		<b>\$5,900.00</b>

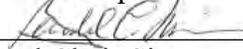
#### \*Attach Appendix L: Insurance Quotes

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.

### 4.4 Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

We, the Board members at **Oak Grove Charter Academy** 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.

  
 \_\_\_\_\_  
 Board Chair Signature

August 23, 2019  
 \_\_\_\_\_  
 Date

## Start-Up Plan

1. Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).

Upon the approval of our charter, our Board will meet regularly to discuss and approve matters necessary for immediate success. These meetings will be open to the public. Our Board will participate in and meet all deadlines required in the Ready-to-Open process. We will also benefit from the process that NHA has in place to open new schools, which includes timelines and tasks to ensure our school starts well academically, financially, and organizationally.

Facilities: Our facility timeline provided in Section 4.5 offers a detailed plan for identifying, building/renovating, and finalization of our school building.

Marketing/enrollment: We will begin advertising to families as soon as we are notified of our approval. Please see our marketing plan in Section 3.6 for more details about marketing, recruitment, and enrollment.

Staffing: Our Board, in conjunction with NHA, will identify a school principal by January 2021. This allows ample time for the principal to identify other key staff early. Through our strong board governance and NHA's experience in opening schools, we are confident that we have the systems, processes, and personnel to ensure a strong school opening. We are pleased to provide further details upon request.

2. Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as Appendix O, if applicable.

Charter schools often face hurdles in their early years, including securing a facility and maintaining sufficient cash flow to deliver a high-quality academic program. We will be able to mitigate many risks faced by new schools through our comprehensive Services Agreement with NHA and its long-term commitment to our school: NHA will acquire property suitable to our Board and build or renovate a facility at no cost to our Board or local taxpayers.

NHA provides our school with private capital to finance the facilities and offers this as a contribution, not a loan. Our budget shows that NHA will pledge a total of \$1.3 million in the first few years as we begin operations. Additionally, we have no obligation to raise philanthropic funding.

## 4.5 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.

1. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.

In anticipation of approval of this application, NHA's real estate acquisition team and our Board have begun an exhaustive search of properties on which to locate a building for our school. We are considering both constructing a new school building or renovating an existing facility to make it suitable for our programmatic needs. The provision of an appropriately designed facility for our staff and students is one of the most important aspects of our partnership with NHA. Population and economic growth in and around Gorman are spurring the need for a school like ours. Durham County is the fourth-largest in North Carolina, with a steady rate of population growth averaging 1.5 percent annually since 2000. In recent decades, as this region has added professional and technical talent and developed a new tradition of entrepreneurship, the economy has accelerated its transformation from one rooted in the traditional foundations of tobacco and textile products to a thriving technology- and research-based economy. This growth will undoubtedly bring additional students to our area, meaning the construction of a school facility for OGCA – built at no upfront cost to taxpayers – will be a welcome, needed addition.

Acquiring a facility: Once our charter application is approved, we will work with NHA and the necessary governing bodies to complete the land use approval process for the real estate we have identified. It is our goal to have a minimum of two land parcels identified in order to share details on progress being made with the CSAB at a prospective interview. NHA knows clearly the need to expedite land use approval and construction processes in order to successfully open in the fall of 2021. NHA pledges an up-front investment to cover land use approvals, construction, and construction-related costs. The school and our Board do not pay anything. The facility, which will be financed privately, is built to house the entire planned K-8 academic program from day one, even though our school will be launched with fewer grades. Although this strategy may be more costly for NHA, it is valuable to us because it removes all potential disruptions as we grow and deliver the academic program. Being able to occupy a facility specifically designed for our planned educational program is a benefit for our students and staff. We will avoid overcrowding or trying to fit our program into a facility designed for a different purpose. Our partnership with NHA will give us the exact facility we want and need for OGCA.

Given NHA's experience with this process, we are confident that our school will be completed one time for an August 2021 opening. Included below is a proposed and tentative timeline for construction, though these dates are subject to change and may be moved forward as possible.

<b>Task</b>	<b>Finish Date</b>
Select Architect and Construction Manager	June 2020
Set-Aside Property Requested from District	Late July 2020
Building & Site Design	August 2020
Submit Design for City & State Approvals	August 2020
Land Purchase Agreement Executed	August 2020
Bid & Award Subcontracts	September 2020
Construction Start	September 2020
Site and Building Pad Prep	November 2020
Building Framing	January 2021
Building Rough-ins	March 2021
Building Enclosed	March 2021
Interior Finishes	May 2021
Final Building Inspections	June 2021
Certificate of Occupancy	June 2021
Load Building with Furniture & Equipment	July 2021
School Staff Move-in	July 2021
First Day of School	August 2021

Obtaining a certificate of occupancy: The Board and NHA will ensure that we comply with all building codes in the development of a school facility. NHA has experience and is familiar with requirements in Durham County. We will work with our local building department to determine, in a timely manner, if modifications to an existing facility must be approved by the North Carolina Department of Insurance for building code compliance. Our Board and NHA will ensure that we receive an educational certificate of occupancy from the local building department before our school opening. Over the last six years, NHA has successfully built and opened eight new partner schools in North Carolina, with one of those opening in temporary facilities as construction on the permanent facility was finished. We have discussed this challenge with NHA and have been adamant that earlier due diligence take place on our real estate and facilities plans to ensure that we experience no similar delays. We will also make certain we have insurance coverage for the facility at or above what is required by applicable law. Our insurance quote in Appendix L includes coverage in all required areas. Some of these items are included in the property insurance and umbrella policy specifications (such as boiler and machinery, real and personal property, fidelity bonds, etc.).

2. Describe the school's facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.

Members of our Board have met with NHA to define a target real estate search area. NHA's real estate team has begun to identify suitable properties. NHA has experience with real estate searches across North Carolina, partnering to open schools in multiple counties since 2013.

NHA makes a multi-million-dollar up-front investment to cover site plan reviews, permits, construction, and construction-related costs. The school and our Board do not pay anything. The facility, which will be financed privately, will be built to house the entire planned K-8 academic program from day one, even though the school will be launched with fewer grades. Although this strategy may be more costly for NHA, it is valuable to our school because it eliminates potential disruption to both the neighbors surrounding the site and the school's academic program in future years – because no additional construction will be needed while school is in session. Being able to occupy a new facility specifically designed for OGCA is a huge plus for our students and our faculty. We will avoid overcrowding or trying to fit into a facility designed for a different purpose. Our partnership with NHA will give us the exact facility OGCA wants and needs.

OGCA will encompass about 45,000 square feet, and the facility will include enough space for a play area, a play field, and adequate parking. This safe, clean, and learning-friendly school will be accessible to all students. The school building will include: classrooms (28), student support rooms (7), media center/library, gymnasium, parent room, art room, music room, administrative spaces, and front office. The building will accommodate the full K-8 program from day one, even though we will only start with grades K-5. This will allow the school to leverage the additional space in our early years for interventions and small-group instruction.

If the OGCA Board ever decides that our relationship with NHA is not providing desired outcomes for students and families, we will be prepared to terminate our Services Agreement with NHA. At that time, we would begin looking for alternate school facility options, but, importantly, the school will still be able to use the existing building. Under the separate Lease Agreement, our school is authorized to stay in the facility for the remainder of any current school year and the following school year, and NHA is obliged to continue to manage and maintain the facility. After that, we are free to purchase the building, negotiate a new Lease Agreement (for which we would solicit advice from our independent legal counsel), or find another location for our school. In such an event, the original list of potential sites from our initial property search would serve as a ready-made starting point for locating an alternate facility.

3. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, work room/copy room, supplies/storage, teacher work rooms, and other spaces.

As noted, our intended facility will be fully outfitted to serve students in grades kindergarten through eight from day one. NHA provides this benefit to avoid the distractions that ultimately occur if renovations are needed as a school grows. Our school plans to have an art room, a library/media center, main office, administrative spaces, a work room/copy room, as well as space for storage and supplies. We will also plan for space for a dedicated parent room.

4. 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.

Our projected lease cost with NHA is \$29.89/sq. ft. We are comfortable with this rate, as NHA assumes all financial risk, buildings like ours are typically single-use buildings, and our lease is contingent upon our charter being renewed. NHA shoulders all financial risks in this scenario.

5. 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.

Gerald McNair, our lead applicant, currently partners with NHA as a member of the Board of RTCA. Through his efforts on that Board, he understands how NHA and its real estate team work to find suitable land and construct a school facility. We have started working with NHA's real estate team on the process for our school, compiling a list of potential properties. We will make sure we stay on track by initially identifying a number of building options, with one named as our Board's preferred site. In the event we encounter unforeseen obstacles with our primary property, and those hurdles cannot be solved within reasonable efforts and expenses, we will work with NHA to transact one of the other properties found in the initial search. Upon receiving approval of our charter for OGCA, we are confident we will be able to secure land and finalize construction to begin serving students in August 2021.

The total space needed for OGCA's school building is approximately six to eight acres, with a building square footage of approximately 48,500. We will include appropriate space for a play area and play field, as well as sufficient space for parking. The envisioned school building will include: approximately 28 classrooms; seven student support rooms; an art room; a music room; a media center; a gymnasium; a parent room; a front office; administrative spaces for our principal and deans; a teacher workroom; and, a conference room. If constraints on space are needed for any reason, contingency options could include: combining the music and art rooms; consolidating administrative offices; modifying the play area, play field, or parking; and/or waiting and scaling up the number of classrooms and student support rooms only as the school grows from its starting configuration as a K-5 school to a K-8 school in our third year.

If we ever determine our relationship with NHA is not producing our intended outcomes for the families and students we serve, our Services Agreement allows us to terminate the partnership with or without cause. Upon doing so, we would begin a search for alternate school facility options. However, OGCA will continue to have access to the existing facility. Under provisions in our separate Lease Agreement, our school is authorized to stay in the facility for the remainder of any current school year, and NHA is obliged to continue to manage and maintain the facility. Additionally, our lease gives the Board the option to lease the facility for a subsequent school year at the current rental rate. After that, we are free to purchase the building, negotiate a new Lease Agreement (for which we would solicit advice from our independent legal counsel), or find another location for our school. In such an event, the original list of potential sites from our initial property search will serve as a ready-made starting point for locating an alternate facility.

6. Describe the board’s capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Our Board and school will benefit from our partnership with NHA in delivering us a facility to house our entire academic program from day one. We are a governing Board, and in maintaining that composition, are choosing to delegate to NHA the responsibility of presenting us with suitable real estate properties, acquiring those properties, and managing the build-out or renovation of our school. We are confident in doing so because NHA has a record of acquiring land and constructing or renovating 13 schools in North Carolina and 88 total schools across the country. We have not yet identified a specific site for OGCA and are conducting a thorough search. Part of the commitment NHA has made to our Board is to provide an initial multi-million-dollar investment so that we are ready to meet the needs of our community from day one. This includes a site that allows us to best serve all students with our chosen educational program.

Once NHA has acquired a suitable site, it will manage the construction process and report to our Board regularly on progress toward an on-time school opening. NHA will build and equip the facility as it does with other partner schools, complying with all health, building code, and safety requirements, including all requirements of the Americans with Disabilities Act. Given NHA’s experience, we are confident that OGCA will be completed for a 2021-22 opening.

### Certify

This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.  Yes  No

Explanation (optional): As noted, our application was prepared in partnership with NHA. As such, our Board understands much of the language regarding practices, procedures, and systems will be similar to applications of other schools who have chosen to engage NHA as their management partner.

## Section 5 Financial Plan

### 5.1 Charter School Budget

All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. 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.

#### **\*Attach Appendix M: Revenue Assurances**

Assurances are needed to confirm the commitment of any additional sources of revenue.

#### **\*Attach Appendix N: Proposed Budget for Year 1 through Year 5**

Budget template can be located on the Office of Charter Schools Application website.

## 5.2 Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.

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

Our school will open serving grades K-5 (520 students in total). As noted, we will grow by one grade per year to ultimately serve students through eighth grade in 2024 (772 students in total).

We have confidence in our ability to attract students and meet specified enrollment benchmarks. While Durham County has many charter schools, none are within the immediate target area where our current land search is underway. As investments are made in the Gorman community, additional school seats will be necessary to accommodate the growth that will follow. OGCA will offer a new or renovated school facility that is exceedingly sufficient for high-quality learning that is based in moral focus. We believe this will be highly attractive to families in our area. Our initial student enrollment outreach effort will be designed to saturate the area around the chosen school site. We will partner with RTCA, the closest NHA-partner school, to inform the community about our new school choice.

We did not establish a "break-even" point between student enrollment and our budget. The requested size and phased growth for the school is accommodated both by our planned annual student enrollment and a commitment from NHA to support the establishment of our complete educational program from day one. NHA has pledged to contribute (not loaning) all necessary funds for expenses that exceed revenues in any given year, removing any risk associated with attaining student enrollment projections. While we are confident that we will meet our enrollment estimates included here, and thus revenue projections, the pledge of support by NHA assures our Board that we will never be in a position that requires cuts to our planned educational program. Our partnership with NHA also helps to make certain we always have the ability to cover all expenses to meet all short-term obligations - including payroll - even prior to receiving the state, local, and federal funds due to the school. This is a significant benefit in the early years of our school, easing and improving our financial planning process.

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

We previously noted the combination of both population and economic growth in the Gorman community. Since the 2010 census, the population in our area is estimated to have grown by 17.3 percent, with 20.8 percent of our population being under the age of 18. Additional school seats will be necessary to accommodate the current and continued growth.

There are currently no other charter schools in Gorman, and a 2018 study by the Fordham Institute found that there is a need for additional school choice in the area in which we are targeting to locate OGCA. Our Board believes our partnership with NHA will be attractive to families. It has a documented record of success in North Carolina, and our sister school RTCA currently maintains a wait list of over 200 students.

### 3. Provide the break-even point of student enrollment.

We have set no break-even point based on enrollment. NHA is contractually bound to implement its complete educational program from day one. This includes pledging funds necessary to cover

any operating expenses that might exceed revenues, thereby ensuring we always have sufficient cash flow. NHA is willing to make these investments because of its commitment to a “double bottom line:” a recognition that only sustained academic success can generate long-term financial sustainability. NHA embraces the primacy of academic success as both an operational reality and a core value. Our knowledge of the community and market research makes us confident we will attract enough students to meet projections on enrollment and revenue. Nonetheless, NHA’s pledged support ensures that the school will have the necessary resources to deliver our envisioned educational program.

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

Within our Services Agreement with NHA, NHA commits to cover all expenditures that exceed revenues in our school’s first few years. This will allow for a planned and phased growth. Our budget is built conservatively, and it includes an expected contribution (not a loan) from NHA of approximately \$900 thousand in the first year of operation. An additional \$400 thousand is included for our second year. As these are contributions, there is no expectation of repayment. We will be able to provide our full facility and entire academic program in our first year, despite beginning with fewer students. Beginning in our third year, we anticipate revenue covering our operating expenditures. Our Services Agreement gives us comfort in knowing NHA will ensure our needs will be met even if revenues decline.

5. 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. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.

Our proposed budget, specifically for the school’s first two years of operation, include contributions from NHA. These are not loans, and there is no expectation or obligation of repayment from our Board. These are included in the line item “Other Funds.” NHA contributions are budgeted at \$900,000 in the first operational year, and \$400,000 in the second.

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

Our projected student-to-teacher ratio will be approximately 19:1. Our school’s budget is not constructed on a specific ratio; however, the main drivers for budget expenditures are the number and anticipated characteristics of students to be served, the number of classrooms in use, and overall operational costs of the school. As the school grows by adding grade levels and classrooms in our early years, so does projected staffing. The planned staffing pattern allows for a concentration of core subject teachers while offering co-curricular classes (music, art, physical education, etc.), and provides for staffing for EC and EL students. The staffing model and budget reflect this 19:1 pupil-to-instructional staff ratio in the school's charter term.

7. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.

Our Board brings a tremendous level of experience and expertise to the governance of OGCA. We have collectively been involved in many areas of industry, and members of our Board are skilled with the financial aspect of these areas. Gerald McNair, our lead applicant, currently serves on the Board of RTCA. Part of his responsibility as a Board member is to ensure the proper oversight of financial planning and budgeting. Our school will delegate to NHA the daily operations of OGCA, including financial management, but we will lean on our backgrounds to make the best decisions for our school.

8. Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

In order to best fulfill our mission and vision, we must strive to provide a high-quality education for all students who wish to enroll with us. Our Board is committed to deliver this opportunity for all students, and our partnership with NHA will help us do so. NHA supports our plan to pursue our mission through its complete educational program. This includes pledging the funds necessary to cover any operating expenses that might exceed revenues. Our budget includes a contribution from NHA for each of the first two years, totaling approximately \$1.3 million. We know the absence of financial security can adversely affect new charter schools. Our budget has been built consistent with appropriately serving students with special needs. We will not know the specific needs of our students until our charter is granted and students begin to enroll but have planned for resources to meet the needs of our anticipated student population.

9. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits, fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.

Our Services Agreement with NHA calls for the organization to provide the school with all necessary staffing, school services, and back-office functions, including purchasing, accounting, business services, informational technology, data reporting, data warehousing, human resources, and payroll. NHA uses a standardized human resource, purchasing, and payroll software system to internally manage all transactions related to the personnel, purchasing, and payroll functions that supports full compliance with generally accepted accounting principles. NHA manages compensation, payroll, and compliance for approximately 5,000 school-based employees in nine states and has the experience and efficiency to provide these services to OGCA.

10. 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.

We are partnering with NHA, and our Services Agreement requires NHA to provide OGCA with all necessary staffing, school services, and back-office functions, including purchasing, accounting, business services, informational technology, data reporting, data warehousing, human resources, and payroll. On behalf of our school, NHA will follow applicable state and federal law with respect to the selection of contractors and large purchases on behalf of the school, including competitive bidding or sole-source documentation as applicable.

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

Our school will maintain a balanced budget every year. NHA has a documented record of success in opening and operating schools, and it has pledged the establishment of each partner school's educational program by offering needed additional contribution to complement the receipt of public revenue. No NHA-partner school has ever closed due to financial issues of any kind. Further, no partner school has ever chosen to terminate its relationship with NHA. Our Board understands this displays NHA's strength in developing budgets and structures to provide the appropriate level of financial commitment to each partner school's academic program. Within our school, the priorities of our educational program include: a distributed leadership model to allow for greater coaching; an expansive professional development program; an entire curricular program emphasizing core areas of math, ELA, social studies, and science complemented with art, music, physical education, and other special areas; and our moral focus program. NHA's "Total Rewards" compensation structure, coupled with its competitive benefits offerings, allow OGCA to appear even more attractive to prospective high-quality staff. This helps us to cultivate and foster a climate and culture allowing excellent teachers to grow in both responsibility and leadership. Our Board will be dedicated to ensuring the school is accessible to every student, and that transportation is not a barrier for any child. Our budget includes \$10,000 to cover the cost of extraordinary transportation needs for students experiencing homelessness and EC students with transportation needs stated in their IEPs.

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

Describe how the school will develop the fund balance.

The budget includes a set-aside of two percent of per pupil revenue (up to \$35,000 per year) for use at the school at our Board's discretion. We may expend these for initiatives beyond the model educational and operational program. We may also accumulate these funds into a reserve for later use. NHA is committed to delivering the educational program we have proposed, according to the budget the Board approves, even if expenses for the school outpace revenues.

This support is specified within our Services Agreement with NHA, clarifying that NHA assumes the obligation for all expenses, and assumes all the financial risk. Since NHA is obligated to cover the entirety of planned costs, there is no need for the school to maintain a substantial fund balance. We have experience as Board members at NHA-partner schools and have spoken with Board members at other NHA-partner schools. We have confirmed NHA's financial commitment to its partner schools. And while there is no forecasted substantial surplus, there also will be no deficit because of NHA's funding commitment. In turn, our Board would not have any debt to cover should we ever terminate our partnership with NHA. As noted elsewhere in this application, the experience of other NHA-partner schools in North Carolina shows each of these schools consistently ending each year with a small budget surplus. We recognize the guidance from NCDPI that schools show additional indicators of financial viability beyond the proposed Services Agreement with NHA. NHA-partner schools in North Carolina (and all nine states where NHA operates) consistently receive unqualified audits, meet total margin ratios, and do not carry long-term debt. No school partnering with NHA has ever been closed for financial reasons, and NHA has never walked away from a partnership with a school, even when enrollment or funding at the school has decreased.

In accordance with our Services Agreement, our Board will retain a discretionary expenditure fund to be used for Board-driven school purposes and programs. We are contemplating using these funds to create a fund balance and may set aside up to half of these funds each year to build an ongoing fund balance. We will revisit our fund balance needs after each year of operations as part of our annual evaluation of the performance of NHA. If, as we believe will occur, we are satisfied with the performance of NHA, we will be comfortable choosing to reinvest these funds in the educational program at our school. Our budget with this application does not reflect this potential surplus, as we chose to project satisfaction with our programming.

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

This budget assumes that OGCA will need no funds from banks, other lending institutions, outside corporations, foundations, or other sources. OGCA will start as a K-5 school and grow over the following three years to a K-8 school. Nonetheless, our educational program will be fully implemented from day one, so we recognize the wisdom of initially occupying a facility that has been constructed to house our full K-8 model. Accordingly, NHA has pledged contributions that will meet operating expenses above revenues received in the school's early years. Appendix M includes a letter of revenue assurances from NHA, which further demonstrates the organization's initial and ongoing commitment to our school, and Appendix A4.1 includes our executed Services Agreement with NHA, detailing the financial structure for our school.

14. 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.

OGCA will not have assets from other sources. Through the Services Agreement with NHA, NHA will purchase and provide assets on behalf of our school.

### 5.3 Financial Compliance

1. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate recording keeping?

We will enact a fiscal management policy that requires sufficient internal controls, and we will ensure that OGCA and NHA adhere to it. Examples of internal controls include: continually reviewing payroll information and reconciliation with the employee master file; using an established signatory authority for bank accounts and monthly account reconciliation; mandatory review and approval of purchase order requests; monthly analysis of detailed financial statements against our annual budget; use of an integrated computerized accounting system for all general ledger, purchasing, fixed assets and grant accounting, payroll, personnel and cash receipt/disbursements activities; and segregation of duties.

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

We know of no related-party transactions that will take place in our school, and we expect no related-party transactions. Our bylaws require us to avoid conflicts of interest.

3. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number and fax number. If a firm has yet to be identified, please list the firms the board has investigated.

Our Board is reviewing options for an independent financial audit and is considering three firms:

Name: BDO USA, LLP

Address: 5430 Wade Park Blvd Suite 208, Raleigh, NC 27607

Phone Number: 919-754-9370

Name: Rives & Associates, LLP

Address: 4515 Falls of Neuse Road Suite 450, Raleigh, NC 27609

Phone Number: 919-832-6848

Name: Plante Moran

Address: 634 Front Ave NW, Grand Rapids, MI 49504

Phone Number: 616-774-8221

### Certify

This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.  Yes  No

Explanation (optional): As noted, our application was prepared in partnership with NHA. As such, our Board understands much of the language regarding practices, procedures, and systems will be similar to applications of other schools who have chosen to partner with NHA.

### Application Fee

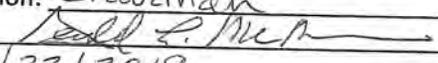
Pursuant to G.S. 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by **July 29, 2019 at 5:00 pm EST** for Fast Track and Accelerated applications, and **August 26, 2019 at 5:00 pm EST** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash is not accepted.

**\*Application Note: The applicant must mail the certified check along with the Application Fee Payment Form before or on the due date of July 29, 2019 at 5:00 pm EST for Fast Track and Accelerated applicants, and August 26, 2019 at 5:00 pm EST for traditional timeline applicants.** Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete. Payments should be made payable to North Carolina Department of Public Instruction

North Carolina Department of Public Instruction  
Office of Charter Schools  
6307 Mail Service Center  
Raleigh, NC 27699-6307

## Signature Page

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

Print/Type Name: Gerald L. McNair  
Board Position: Chairman  
Signature:   
Date: 8/22/2019

Sworn to and subscribed before me this 22 day of AUGUST, 2019.

Notary Public: 

My commission expires: 02/20, 2024.

