



### Application Preliminary Evaluation Packet

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

- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets minimum components as evidenced by the check boxes of the rubric.
- § Fail: The response either fails to entirely address the selection criteria or addresses some of the criteria. The responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully. The application fails to address all of the minimum components as evidenced by the check boxes of the rubric.

#### Subcommittee Members:

Steven Walker  
Danielle Allen  
Cheryl Turner  
Austin Smigel  
Alan Hawkes  
Alex Quigley  
Stephenie Clark  
Heather Soja  
Joe Maimone  
Tracy Kelley  
Lisa Huddleston  
Lynn Kroeger  
Stephen Gay  
Ginger Cash

#### Date of Review:



## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# Achieving Excellence Academy ofCharlotte

**Public charter schools opening the fall of 2020**

**Due by 5:00 pm, October 1, 2018**

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

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

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

**APPLICATION DUE DATE/TIME**

**October 1, 2018** A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

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

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

**APPLICATION SPECIFICATIONS**

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

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

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VII. \_\_\_\_\_

AGREEMENT PAGE

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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: *Achieving Excellence Academy ofCharlotte*

X

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

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

Name of non-profit organization under which charter will be organized or operated: *Achieving Excellence Academy ofCharlotte*

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

Name of contact person: *Jeannine Carrington*

Title/Relationship to to nonprofitMunicipality: *Founder/Executive Director/ School Principal*

Mailing address: *2230 E.Franklin Blvd Num 238 suite  
gastonia NC 28054*

Primary telephone: *704-457-9293* Alternative telephone: *980-989-0098*

E-Mail address: *jcarrington@achievingexcellenceacademyofcharlotte.com*

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

County: *MECKLENBURG*

LEA: *600-Charlotte-Mecklenburg Schools*

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

No:

Yes:

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

No:

Yes:

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

No:

Yes:

*Acceleration*

Yes:

No:

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

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

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

Achieving Excellence Academy of Charlotte Charter School will be located on the west side of Charlotte, North Carolina within Mecklenburg county. According to the U.S. Census Bureau data (2017), it is evident that there are clear disparities in income and education levels across the major ethnic groups within the neighborhood of the proposed charter school. According to the U.S. Census Bureau data (2017), 63.7% of the children residing on the westside of Charlotte are below the federal poverty line. In fact, this neighborhood has a higher rate of childhood poverty than 96.9% of U.S. neighborhoods. Furthermore, according to The Neighborhood Scout's research (2018), there are a number of people of African ancestry (28%), Hispanic ancestry (14%), Asian ancestry (5.3%) and Yugoslav ancestry (2.9%). Parents residing in this neighborhood have expressed an overall dissatisfaction with the quality of education that their children are currently receiving through the CMS school district. Parents have expressed that there is a lack of a rigorous curriculum, that challenges their children, lack of an individualized or specialized curriculum to meet the learning needs of their children and a lack of mentoring community partnerships, leadership development and college prep activities available for their children. In addition, there is a high level of children within the neighborhood that this charter school will serve that require Exceptional Children Services to provide support students with disabilities to access to the general curriculum and intervention programs designed to provide maximum opportunities for instruction in the general-education setting, to provide a full continuum of services, including, occupational, physical therapy and speech related services and technology. Being that we will provide specialized, tailored instruction to meet the learning needs of all learners we will fill the educational gap that currently exists. According to the North Carolina School Report Cards (2016-2017), the nearest Elementary, Middle and High schools in the proposed school location have received a "D" performance on the 2016-2017. In addition, the west Charlotte CMS schools do not provide a specialized instructional curriculum needed to support students with learning difficulties & or career, college prep and leadership development that our school will provide to not only support the academic, social, and leadership development for our students

but to have an immediate, positive impact on the community as a whole. Therefore it is crucial that the accelerated planning year for Achieving Excellence Academy of Charlotte Charter School be approved to increase educational options and provide specialized instruction to make a positive impact in the lives of all of our students, their families and the community that this school proposes to serve.

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

Yes:

No: X

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

Yes:

No: X

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

No, we are currently in the process of identifying a feasible building that will meet their needs of our learners. We are working with a charter school builder that also provides financing and support to new charter school administrators.

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

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

1. *Unique mission and educational program.*
2. *Local, state, and national nonprofit partnerships committed to assisting the school.*
3. *Potential for economic and educational development of the region.*
4. *Mentoring by a successful organization that has experience in creating public schools.*
5. *Obstacles to educational reform efforts that leave chartering as an available option.*
6. *Commitment to work with a successful charter school board as a guiding mentor.*
7. *The length of time the board of directors has existed.*
8. *Whether the proposed board has previously or currently operates a successful public charter school.*

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

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

1. *The school must include grades 9-12.*
2. *At least 75% of the school's population in grades 9-12 must be at-risk of academic failure as defined in GCS-Q-001, I.B, and must also meet one or more of the following indicators:*
  - a. *The student must either be recently released from a juvenile justice facility, or otherwise be subject to and participating in the juvenile justice court process;*

- b. *The student must be currently served by a treatment facility licensed pursuant to Chapter 122C of the General Statutes, or have recently been discharged from such a facility;*
- c. *The student must be currently under long-term suspension from a public or private school ; or*
- d. *The student must be a high-school dropout as defined in GCS-Q-001; or be imminently at risk of dropping out as demonstrated by adequate documentation in the charter school's application for designation under this policy.*

Yes:

No:

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

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

*What is the name of the nonprofit organization that governs this charter school?* Achieving Excellence Academy ofCharlotte

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

**Grade Levels Served and Total Student Enrollment:**

*Projected School Opening: Year 2020                      Month August*

*Will this school operate on a year round schedule?*

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (*

*5*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
Year 1	K,01,02,03,04	300
Year 2	K,01,02,03,04,05	360
Year 3	K,01,02,03,04,05,06	420
Year 4	K,01,02,03,04,05,06,07	480
Year 5	K,01,02,03,04,05,06,07,08	540

*The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters,*

and demands full accountability from charter schools for school finances and student performance.

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

jcarrington

Executive Director/Founder

*Signature*

*Title*

jcarrington

09/29/2018

*Printed Name*

*Date*

<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>The enrollment and grade level projections are ambitious and not realistic year 1 would you consider starting k-1? Why or why not?</u>	<u>Tracy Kelley</u>	<u>Grade Levels</u>
<u>Targeted opening enrollment is good and staggered growth will help with grow your own. The original 300 will help with budget</u>	<u>Stephen Gay</u>	<u>Grade Levels</u>
<u>Depending upon the evidence the applicant has gathered to support the need for this school (as well as the proposed location), 300 students in grades K-4 in year 1 may be quite ambitious.</u>	<u>Danielle Allen</u>	<u>Grade Levels</u>
<u>Meets basic requirements</u>	<u>Stephen Gay</u>	<u>Certify Appl</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Steven Walker</u>	
<u>Danielle Allen</u>	<u>Pass</u>
<u>Cheryl Turner</u>	
<u>Austin Smigel</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Alex Quigley</u>	
<u>Stephenie Clark</u>	
<u>Heather Soja</u>	
<u>Joe Maimone</u>	
<u>Tracy Kelley</u>	<u>Fail</u>
<u>Lisa Huddleston</u>	<u>Pass</u>
<u>Lynn Kroeger</u>	
<u>Stephen Gay</u>	<u>Pass</u>
<u>Ginger Cash</u>	

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### **Mission:**

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

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

The mission statement is as follows: To inspire, support and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

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

It is the mission of Achieving Excellence Academy of Charlotte to attain highly skilled educators and specialists to provide explicit, specialized instruction to support economically disadvantaged students with learning difficulties, limited English proficiency & intellectual disabilities to matriculate through the North Carolina Common Core curriculum at a pace that supports student growth, enhances student performance and unlocks each students full potential.

### **Educational need and Targeted Student Population of the Proposed Charter School:**

- 1. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Describe the rationale for selecting the location and student body.*

Achieving Excellence Academy of Charlotte will serve students residing in economically disadvantaged and racially diverse communities in West Charlotte, Mecklenburg county, as well as neighboring counties with a focus on providing explicit, specialized instruction and coaching to support students with learning difficulties limited English proficiency & intellectual disabilities to increase student achievement and academic performance. According to Charlotte Mecklenburg (CMS) local education agency (2017-2018), school data reported the average daily membership as 147,359; this is an increase of 1,397 students with the potential for student enrollment to increase significantly in the 2018 -2024 school years. According to CMS district demographic data (2018), the racial and ethnic composition of the target student population reflects : 40% African American, 4% American Indian, 6.6% Asian, 24% Hispanic, 4% Multiracial, 1% Pacific Islander, 28% White. According to the data obtained from the U.S. Census Bureau 2017, there is extreme poverty present in sections of West Charlotte communities that is considered well below the Federal Poverty Level. This community has a greater percentage of African American, Hispanic and White children living in poverty (63.7%) than found in 96.9% of all U.S.

neighborhoods. Astoundedly, more than one-third of the African American children and one third of the Hispanic children in West Charlotte live in poverty. Furthermore, 10% of Caucasian children residing in West Charlotte that live in poverty. The total West Charlotte population is 151,583. There are 37,004 households with children within the West Charlotte community. The racial makeup of this community is 40% Caucasian, 35% African American, 23% Hispanic, 5% Asian, and 16 % Multiracial. The most common non English language spoken in West Charlotte is Spanish 25 %, followed by Asian 5% and African 0.72%. There are also a number of families of West Indian ancestry along with (Vietnamese (3.5%) and of German ancestry (4.7%). It is important to mention that approximately 20% of the West Charlotte community are foreign born Charlotte residents speaking a variety of languages. According to CMS data ( 2017- 2018), there are 197 Native Languages spoken by students attending CMS schools and there are also 183 Countries represented by the students attending CMS district and according to CMS report card( 2017), ELL learners at CMS are not meeting state proficiency levels, this presents a crucial need for this specialized school to meet the individual needs of the English Language Learners. In addition, within West Charlotte there are many children that have exhibited learning difficulties & or have documented intellectual disabilities or impairments such as learning disabilities, autism, visual, hearing & other health impairments that negatively impact student performance. More importantly, according to The National Center For Education Statistics (2017), there are 175 schools within the CMS district serving 18,000 limited English Proficiency students & 15,000 students with IEPs. Out of those 175 schools, Achieving Excellence Academy of Charlotte will be the only K-12 school specializing in providing explicit, specialized instruction targeted to students with learning difficulties, limited English proficiency & intellectual disabilities. In terms of student enrollment, from year 1- 5, the maximum student enrollment will be 540 students; From year 6 - 12, the total maximum student enrollment will be 900 students. Lastly, Achieving Excellence Academy of Charlotte Charter school will greatly reduce school transportation expenses being that this school will be located within the community of West Charlotte where cluster bus stops will be arranged and or parents can transport or walk their child to and from school. Any funds saved in the absence of transportation expenses will be used to support the summer enrichment program.

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

Achieving Excellence Academy of Charlotte, a K-12 specialized school, will serve 540 students from year 1- 5, with a maximum student enrollment of 960 students by the 12th year of 2031. This school will start the first school year with a total of 300 students. Year one student enrollment is as follows: Kindergarten( 60 students), First grade (60 students), Second grade( 60 students), Third grade (60 students), Fourth grade (60 students) for a total of 360 students. Year two student enrollment: Kindergarten( 60 students), First grade (60 students), Second grade( 60 students), Third grade (60 students), Fourth grade (60 students). Fifth grade( 60 students) for a total of 420 students. Year three student enrollment: Kindergarten( 60 students), First grade (60 students), Second grade ( 60 students), Third

grade (60 students), Fourth grade (60 students).Fifth grade( 60 students),Sixth grade( 60 students)for a total of 480 students. Year Four student enrollment:Kindergarten( 60 students), First grade (60 students), Second grade ( 60 students),Third grade (60 students), Fourth grade (60 students).Fifth grade( 60 students), Sixth grade( 60 students),Seventh grade (60 students), for a total of 480 students. Year Five student enrollment:Kindergarten( 60 students), First grade (60 students), Second grade(60 students),Third grade (60 students), Fourth grade (60 students),Fifth grade( 60 students),Sixth grade( 60 students),Seventh grade (60 students)and Eighth grade (60 students)with a total of 540 students.The school will expand to grade 8 in year 2027, grade 9 in year 2028, grade 10 in year 2029. Grade 11 in year 2030 and grade 12 by the year of 2031. The maximum grade level enrollment is 60 students per grade level. The reported 2018 student enrollment data for the Local Education Agency, Charlotte Mecklenburg School District (CMS) reflects a total enrollment of 32,280 students.This includes:11,373 Kindergarten students, 11,876 First Grade students, 12,198 Second Grade students, 12,349 Third Grade students, 12,006 Fourth Grade students, 11,506 Fifth Grade students, 10,925 Sixth Grade students, and 10,311 Seventh Grade students. 11,203 Eighth grade. CMS district average daily membership for 2018- 2019 school year is approximately 149,000.The total projected enrollment of Achieving Excellence Academy of Charlotte,at each grade level is less than one percent of average daily membership of the Local Education Agency at each grade level.

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

The education plan is distinguished by its specialized STEAM instruction to include character development(K-3),school based mentoring(4th-8th),leadership development (6th- 8th) & community service projects( K-12). For instance,all student receive coaching from the Executive Function Coach (EFC). Students will meet with the EFC, once per week in small groups, for 45 -60 minutes.The EFC will set individualized goals based on student need(ie.teaching organizational skills,effective note taking, planning completion of projects etc). For limited English proficiency students, the EFC will work closely with the ESL Teacher to provide an additional level of support through use of reconstructive language strategies. ESL Teachers will support EL learners to increase proficiency in Reading, Writing and oral language.The Learning Specialist (LS) will evaluate all student performance & develop strategies to compensate for learning deficits. The LS will provide remediation within the class setting(ie.writing GIST statements to summarize content, teach knockout test taking strategies,Cloze Reading Strategies to support reading comprehension, KIS strategies to develop textual evidence & the Frayer Model to build vocabulary.The LS will work closely with the EC teachers &ESL teachers to increase student achievement. The EC Teachers will co-teach.assess student performance,ensure appropriate accommodations,create IEP/BIP,504 plans,facilitate team mtgs & collaborate with professionals.The Director of Student Support Services(DSSS) will ensure compliance with federal,state regs pertaining to students with disabilities, supervise the LS,EFC,OT,PT,Speech,ESL & EC Teachers.The Family Services Coordinator will connect families to community resources. The Social Worker will provide psychotherapy to support students in school & home.Curriculum:this school will utilize the research based Great Minds K12 Eureka Math & Great Minds Wit & Wisdom Curriculum(literature,history & science).This curriculum will activate prior knowledge,provide targeted

interventions & is in direct alignment with NC CCCS. Teachers will receive professional development on the Great Minds Curriculum, methods to maximize student learning & other approaches to learning( ie.sheltered instruction observation mode,project based learning,culturally responsive classroom etc).Professional learning communities will be grouped by grade and/or content level to develop lesson plans,review assessments data etc. Remediation:Every day prior to 1st block, students will receive 35 mins of remediation in reading comprehension on "A day"(Mondays,Wednesdays and Fridays)& Math instruction on "B days"(Tuesday, Thursdays). At the conclusion of remediation,school announcements follows then block 1 begins. All core blocks are 90 mins & electives are 45 mins. Technology is integrated throughout all courses & all students have access to chromebooks. It will be a common occurrence for student projects to cross disciplines. For instance,in ELA students will annotate Edgar Allen Poes Tell Tale Heart text & describe the setting, theme & imagery using a digital story map; Science,students use google app. to view interactive videos on the inner workings of the human brain to infer how the brain impacted the characters thoughts and actions in the story;Theatre, students will create the set,act & videotape the production;History, students will illustrate the historical context of the story(ie.modes of transportation, clothing,socioeconomic status);Fine Arts, students will create the heart & other props using pottery clay etc. Lastly, this schools founder is the former Director of the Learning Disability Association(NY)& an EC Administrator which strengthens our school ability to increase student achievement. Achieving Excellence Academy truly understands the needs of students with learning difficulties , limited English proficiency & intellectual disabilities which differs from that of the local LEA.

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

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

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

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

## 6. *Encourage the use of different and innovative teaching methods.*

Achieving Excellence Academy of Charlotte will hire highly skilled faculty consisting of Learning Specialists, Executive Function Coaches, EC Teachers, ELL Teachers, core teachers, etc...whom are knowledgeable in modifying curriculum to meet the needs of all learners; those with learning difficulties and those that are gifted. It is our practice to first ensure that lessons are challenging for high level learners and then differentiate those lessons for medium & low level learners by providing specialized supports to enable them to access the same sophisticated learning activities at a level that they can comprehend. By adhering to this approach this school will challenge advanced learners & provide support to increase student learning for all students with & without learning difficulties. Furthermore, the Learning Specialists, EC Teachers and Classroom Teachers will work together to identify students that are high, mid & low level learners. The Learning Specialist not only works with students that are in need of academic intervention but also to support gifted students to be engaged and challenged. Students that are gifted are supported through cluster grouping in specific classes at each grade level to provide faster-paced lessons, deeper and more advanced content, and opportunities to work with other gifted students & in heterogeneous groupings through Think-Pair-Shares, Clock Buddies etc..

6. Encourage the use of different and innovative teaching methods. This school encourages and supports the use of innovative teaching methods through project based learning activities, inquiry based learning activities and integration of technology throughout all curricular content & grade levels. Research suggests that project-based learning is an effective way to engage all learner to develop deeper learning competencies required for success in college, career, and in life. This schools innovative Project-based learning activities use real-world scenarios, challenges, and problems to engage students in critical thinking, problem solving, teamwork, and self-management. All students will have access to chrome books, teachers will have access to tablets, laptops and smart boards. In addition to the applications that are on the chrome books, students will also access educational websites: [commonlit.com](http://commonlit.com), [readtheory.org](http://readtheory.org) and other websites. Lastly, students will be engaged in several technology based activities ie. Google Docs, YouTube videos, Quizlet, Kahoot!, ,class dojo and the Remind app. These innovative apps and websites support the school faculty to engage their students, remind them about upcoming assignments and homework, provide visual learning through videos, organize student learning, provide group collaboration, and provide check-ups on learning through games and online quizzes.

### **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.*

For the first few years, the School Leader will be responsible for reporting metrics to the Board of Directors and the school on a monthly and/or quarterly basis as appropriate. These metrics include but are not limited to the following: Student achievement: This school promotes student learning

through a clear vision, high expectations and providing a challenging curriculum. Strategy: Measured through analysis of Interim assessment data, teacher made assessments, exit tickets, MAP, BOY, MOY and NC EOG assessments to monitor growth scores. Academic goals: 1. Student achievement in reading will show an 30% increase in reading comprehension by the end of the school year. Strategy: Measured by student performance data reflecting 30% of students demonstrate proficiency in reading comprehension as measured by North Carolina End of Grade Assessments, MAP assessments & ELL assessments. Strategy: Project based learning activities, technology integration, differentiated instruction and specialized instruction from Learning Specialist, Executive Function Coaches, EC Teachers, General Education teachers and other support services. 2. Student achievement in reading will show an 30% increase in Math by the end of the school year. 30% of students will demonstrate proficiency in Math as measured by North Carolina End of Grade Assessments & MAP assessments. Strategy: Project based learning activities, technology integration, differentiated instruction and specialized instruction from Learning Specialist, Executive Function Coaches, EC Teachers, General Education teachers and other support services. Parental Involvement: 1. All Achieving Excellence Academy of Charlotte parents & other stakeholders, will have opportunities to create & develop partnerships that support our students, our school and community. Collaborate to encourage parent involvement that promotes opportunities for the development of positive partnerships by June 9, 2022. Strategy: Measure the amount of consistent parent involvement in school wide activities, including attendance on the PTA, School Improvement Team, volunteering at sporting events, donations to the school, volunteering at school, participating on PTA activities etc.. School Safety: All students at Achieving Excellence Academy of Charlotte will learn in a safe, nurturing, supportive learning environment. Measurable Objective: Collaborate to establish procedures so that all students are safe. Strategy: Measured by completion of monthly fire drills, tornado drills, lock down drills, entry and campus security system, background checks of staff and volunteers, checking visitor photo ids / logging visitors/visitor badges etc. 2. Student Attendance: The goal is a minimum of 94% attendance each school year. Strategy: Measured by student attendance in Powerschool, report cards, Educators Handbooks behavioral data (referral rates, ISS, OSS). 3. Teacher Satisfaction: At Achieving Excellence Academy of Charlotte we want to ensure that not only our students are happy but also our Teachers. The goal is to retain 85% or more of highly skilled teachers to meet or exceed NC state average & increase teacher retention rates. Strategy: Measured by: The North Carolina Teacher Working Conditions Survey and informal google form survey submitted to our teachers twice per year. 4. Governance and Finance: The school values a strong governance and finance framework. 1. The goal is to have 95% of the board attend board of director meetings & participate in committee activities. Strategy: BOD attendance, BOD meeting minutes, BOD performance and compliance evaluations, BOD effectiveness surveys. teacher/student/parent satisfaction surveys. Financial 2: By the end of each fiscal year financial reports will reflect a positive balance. Strategy: Conduct financial audit through monthly & quarterly monitoring/reports by the finance committee and report to board of directors.

*2. How will the governing board know that the proposed public charter school is working toward*

*attaining their mission statement?*

The School Leader will submit a monthly report to the board of directors to demonstrate how the school is working toward attaining its mission statement. The report will include evidence of the school's academic performance, student enrollment, student growth, Personnel issues, equipment needed, service contracts, compliance with local, state, federal rules and regulations, Volunteer Services, Student Transportation, the Schools Lunch Program, facilities issues, any non-compliance issues etc. The school mission will be highlighted at the top of every report that is presented to the governing board and the BOD will receive training on school operations, teaching approaches, advances in technology, and BOD operations specific to this school. The governing board will also assess student learning outcomes/performance to determine if the school is still effective in ensuring that student learning and performance is increasing each year. The governing Board will also support the school in meeting the schools goal and or improvement plans. The governing board will know the school is working toward attaining its mission by through consistent academic progress by students, financial stability, being present and visible and to ensure compliance with local, state, and federal laws, rules, and regulations.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Is school targeting students with learning disabilities, limited English proficiency, and intellectual disabilities? If so, perhaps that should have been included in the mission statement.	Danielle Allen	Mission Stat
Strong focus on curriculum (Great Minds) is rigorous, but identifies the need for remediation.	Stephen Gay	Mission Stat
Survey does not indicate the number of respondents in any of the sections.	Austin Smigel	Mission Stat
the focus on 60 per grade is great - small class size and developing a family base fo rtes future.	Stephen Gay	Educational
Appendix A1 does not include either survey data or public meeting information. Does that data exist?  What are the qualifications for the Executive Function Coaches? Are they teachers or counselors or a hybrid model? How many students will each EFC be responsible for?  Is the school targeting all students who are economically disadvantaged or just those who have learning difficulties, are English learners, or have intellectual disabilities?	Lisa Huddleston	Educational
Being from an economically disadvantage community or household does not, de facto, mean that you have an intellectual disability. The same can be said for English language learners. What is meant by the statement made in description of the school's mission in which it indicates that the schools' mission is to " attain highly skilled educators and specialists to provide explicit,specialized instruction to support economically disadvantaged students with learning difficulties,limited English proficiency & intellectual disabilities" ? Do you want to specifically target a niche sub group of students who are economically disadvantaged ELL students with disabilities? In identifying your target population what consideration was given to the disproportionality and over-representation of economically disadvantaged boys (of all ethnicities, especially boys of color) in special needs classes? How will the support outlined in the response account for this when compared to the LEA? How will the Board learn about sub-group performance, given that this is the focus of your recruitment strategy? How will leaders know they are meeting the needs of students if the leaders and Board are not looking closely at how ELL, students with disabilities, economically disadvantaged students of all races are performing?	Tracy Kelley	Educational
How many total survey responses were received? Total number is helpful in determining whether or not there is substantial need.  What percentage of ELL, SWD and ED students does the school anticipate they will enroll?  Staffing plan has 2 EFCs in year 1, for 300 students (but budget only has one EFC allotted). How will their time be spent such that they're able to develop individualized goals for each student? How does 45-60 minutes, once a week, help the EFC get to know students well enough to create individualized goals?	Danielle Allen	Educational
Strong approach - heavy staff needs!	Stephen Gay	Purposes of
Earlier in the application, the applicant specifically mentioned a desire to serve SWD, ELLs, and EDS students, however, these subgroups do not appear to be explicitly included in the purposes outlined here.  Project-based learning is mentioned here but wasn't mentioned earlier, will this be used in conjunction with the STEAM focus?	Danielle Allen	Purposes of
The purposes identified do not necessarily correlate with the proposed mission to serve at risk students. What different and innovative teaching methods will be	Tracy Kelley	Purposes of

<p>used to specifically improve achievement levels for your target population (SWD, ED, ELL)? How would you define define or determine which students in Mecklenburg county are "at risk" and why? Beyond strategically grouping (hetero or homo) how would differentiation actually work in a typical classroom?</p>		
<p>In the mission section, gifted students are not mentioned. However, this description of the purposes of the school has a major focus on gifted students with no mention of students with intellectual disabilities. How does the school plan to balance the disparate needs of students with intellectual disabilities and those who are intellectually gifted? If focusing on gifted education is a major purpose, why is it not included in the description of the school's mission?</p>	<p>Lisa Huddleston</p>	<p>Purposes of</p>
<p>The stated goals do include specific goals for your targeted population as stated in previous sections and mission description; how will the schools' leaders monitor the learning of students with disabilities, economically disadvantaged, and ELL and even further since there is a focus on executive functioning boys and girls? What academic goals will be used to progress monitor these sub groups and the school writ large? What is the frequency for MAP? What assessment will be used as a predictor of future success on EOY state assessments? What goals will be put in place to monitor the effectiveness of the curriculum and how will the school's achievement and growth goals be incorporated into the school leaders goals? What are the school leaders goals and how will student achievement be incorporated?</p>	<p>Tracy Kelley</p>	<p>Goals for th</p>
<p>For Academic Goal #1, will students show an increase of 30% proficiency in reading or will 30% of students be proficient? What will the baseline be if the goal is to show improvement?</p> <p>For the Financial Goal, the plan is to have a positive balance. Does the school plan to develop more specific goals around this balance, perhaps a dollar amount or a percentage of revenue?</p> <p>Again for Academic Goal #2, will students show a 30% improvement in math or will 30% be proficient?</p> <p>While the mission statement talks explicitly about students with disabilities and English learners, there is no mention of measuring the achievement of these groups. How will the school determine if these groups of students have been successful?</p>	<p>Lisa Huddleston</p>	<p>Goals for th</p>
<p>Additional detail around goals is needed. Is applicant proposing an increase of 30 percentage points in proficiency in year 1? Given the target demographic, is this a feasible goal for one year?</p> <p>"30% of students will demonstrate proficiency in Math as measured by NC EOG and MAP assessments." What is the baseline proficiency for students in your target student population?</p>	<p>Danielle Allen</p>	<p>Goals for th</p>
<p>Given the specific focus articulated by the team, the goals appear to be misaligned, the stated purposes are also misaligned, and enrollment projections are unrealistic and overly ambitious. While the group has substantial knowledge of the demographic make up of its targeted area there are significant assumptions as to the abilities of the students living in the community. These assumptions appear to evidence a deficit model approach that focuses on students' weakness rather than their strengths. For example, in discussing differentiation and grouping the team misses an opportunity to assess students' learning styles as a basis for differentiating process, product, directions etc.</p>	<p>Tracy Kelley</p>	<p>Certify Miss</p>

Reviewer	Score
Steven Walker	
Danielle Allen	Fail
Cheryl Turner	

Austin Smigel	Pass
Alan Hawkes	
Alex Quigley	
Ginger Cash	
Stephenie Clark	
Stephen Gay	Pass
Lynn Kroeger	
Lisa Huddleston	Fail
Tracy Kelley	Fail
Joe Maimone	
Heather Soja	

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

The educational plan for Achieving Excellence Academy of Charlotte is in direct alignment with the North Carolina Common Core Curriculum Standards & is designed to meet the unique needs of the economically disadvantaged, students with learning difficulties and or limited English proficiency. The education plan is distinguished by its key design elements, including STEAM (enhanced Science Technology, Engineering, Architecture and Mathematics, Literature, History, Leadership development and Foreign Language. In addition, this education plan includes character development (K-3 grade), mentoring activities (4th- 8th grade), leadership development (6th- 8th grade) and community service projects (K-8th grade). These learning activities will be integrated across all subjects areas and will be supported through community partnerships. Students will wear school uniforms daily to create a collegial environment where students can focus their full attention on academics and instills a sense of pride. Each classroom will be equipped with an interactive whiteboard and document camera as instructional tools. Each student will be assigned a Chrome book and will have access to digital educational resources. The education plan is designed to allow students to matriculate at their own pace. ESL Teachers will be on staff to ensure that the English Language learners increase proficiency in Reading, Writing and oral language. The Family Services Coordinator will connect families to community resources available to support the students & their families. In addition, the Social Worker will ensure that students receive the counseling services needed in school and at home. EC Teachers & The Director of Student Support Services will ensure that each students 504 plan, IEP, classroom accommodations & support services are provided appropriately. The school will partner with local community agencies such as the Carolina's Refugee Resettlement Agency, The International House & others. This school will utilize professional development to ensure that educators continue to strengthen their practice to focus on the needs of their students. Professional development will include classroom observations, coaching /mentoring, grade-level, departmental, team meetings, workshops, conferences and faculty meetings. Teaching approaches that this school will utilize are 1. "No Opt Out" (ie., When the 1st student can not answer the question, the question is restated & the 2nd student answers. Next, the 1st student is asked a second question related to the first question. The teacher then provides cues to support 1st student to connect to prior knowledge in order to answer the question independently.) 2. "Stretch it": (ie.. after a student has successfully answered a question, Teacher will probe further by asking inferential type questions to activate critical thinking

skills).3.Culturally responsive classroom approach to support teachers to learn how to create culturally responsive classrooms.By adhering to the research of Gloria Billings in making education culturally relevant,students will be engaged,feel supported and be empowered which will increase academic achievement.5.Sheltered Instruction Observation Protocol model:Teachers will be trained to focus on the needs of ELL to support these students develop proficiency in English.Teachers will work in professional learning communities grouped at the grade and/or subject level to develop lesson plans,develop assessments &review assessment data.In terms of curriculum,this school will utilize the researched based,Great Minds Curriculum.Great Minds Eureka Math Curriculum has won accolades at the state and national levels, and is the only comprehensive math curriculum aligned to the NC CCSS K-8th grade. Great Minds Wit & Wisdom English Curriculum immerses students into literature,history and science.Lastly,the education plan includes a long-term commitment to implementing the plan with fidelity to support our students to achieve educational excellence.

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

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

The basic learning environment for Achieving Excellence Academy of Charlotte Charter school is based on the balanced literacy approach where our teachers of every subject & grade level, will balance explicit language instruction with independent learning and language exploration to support proficiency in reading and to promote lifelong readers. The learning environment consists of five components including read aloud, guided reading, shared reading, independent reading, and word study. Each classroom will be structured in a way that promotes learning, infuses problem-centered, project-based learning into the educational experience which includes stations for group work,use of technology,independent & group activities plus whole group instruction specific to each grade level. Most of the classrooms equipment including tables,desks,and whiteboards are portable, allowing them to easily shift as spatial needs change. Flexible learning spaces allow for interactions and collaborative work, which are fundamental to the development of several 21st century learners. Kindergarten and First grade classrooms will have an open space for circle time,computer area and stations for reading,writing and art with a full-time Teacher and Teacher assistant. 2nd -5th grade classrooms will be structured differently to support whole group instruction, collaborative grouping,independent learning and technology stations. Other grade levels are departmentalized and structured differently for student success. For example, in 6th grade through 8th grade, one Teacher will teach ELA, a separate Teacher teaches Math, with the third Teacher teaching Science for half the school year and then switches over to teaching Social Studies for the second half of that school year. In addition, for grades 6th- 8th grade,an additional teacher will be required to teach Pre-algebra & or Accelerated Math being that these students will take Math I in 7th grade and Math II in 8th grade. In terms of class size,Kindergarten and First grade will not exceed 20 students. Class sizes for 2nd- 8th grade will not exceed 28 students. Support staff will be assigned to each grade level to include:Two EC Teachers,one ELL Teacher, one Literacy Intervention Teacher and one Math Intervention Teacher.Specialists will include: one Character

Education Specialist, Physical Education/Health Teacher, technology, music/Art and foreign language/Theatre. The media center will serve multiple roles: carrying out its traditional role of bringing information resources to learners, providing the tools and infrastructure that enable learners to analyze, synthesize, and evaluate resources to demonstrate learning and create new knowledge. It will also offer places for formal learning in which large groups can gather for presentations; places for social learning where teams can collaborate on projects; and places for individual learning where individuals can find a quiet space for reading, reflection, or relaxation. This mediacenter will also support teachers to connect their students to the wider world beyond the school by providing the audio and video communications technologies that build bridges between people and places all over the globe. Teachers will also utilize the media center to access resources to share knowledge and practice with other professionals, interact with experts in their field & community stakeholders. Administrators need access to these same resources to manage the complexities of the school from student records and performance data, to personnel management and facilities operations. Lastly, for students to learn, they must feel safe, engaged, connected, and supported in their classrooms and schools, therefore we will ensure that our school has adequate security framework to ensure the safety of our students.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*
3. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

Curriculum: This school will utilize the rigorous Great Minds K12 Eureka Math & Great Minds Wit & Wisdom core curriculum for English, Math, Social studies and Science that is aligned to North Carolina Common Core Standards(NCCCS). The school has adopted this curriculum to pace instruction at a level that supports student learning & to give students an opportunity to explore content via multiple methods. The Wit and Wisdom, along with high-quality texts, guided reading methods, essential questions, to build foundational reading skills and higher-order thinking experiences as its core English Language Arts (ELA) curriculum. Lessons are designed to inspire curiosity while students learn and master essential reading, writing, speaking, listening, grammar, and vocabulary skills. The focus is on deepening students ability to comprehend complex texts and establish a basis for the use of evidence in oral and written communication. This program utilizes a multi-sensory approach that uses systematic, explicit instruction in Elementary- High School. It is an integral part of a multitiered system of supports framework to provide research-based instruction focusing on phonemic awareness, phonics, high frequency word study, fluency, vocabulary, comprehension strategies, handwriting, spelling, textual evidence, inferencing, poetry, elements etc.. NC Social studies and Science Common Core

standards are used to plan relevant learning experiences that are integrated with ELA and mathematics. Science & Social Studies skills are also taught through STEAM experiences and project based learning activities designed to challenge and strengthen critical thinking skills. Eureka Math serves as the core math curriculum. Meaningful real-world connections are made to the content, and mathematical fluency and confidence are developed through the use of common strategies from grade to grade. All Teachers at this school utilize technology, project based learning and small group instruction to further develop students skills and understanding of the content. Through these strategies, students have opportunities to engage in both independent and collaborative learning activities, receive intensive instruction and immediate feedback, and practice skills through a variety of methods. For students with learning difficulties, the Learning Specialist and or the EC Teachers will collaborate with general education teachers to work together to design instruction that meets the needs of all learners including gifted students. Cross curricular integration will also occur throughout the school. For example, Social studies and literacy concepts are incorporated into lessons through identification of countries of origin for various types of music, use of ELA books about artists, and identifying time periods that musical pieces were written in a timeline. The Fine Arts teacher implements NC art curriculum concepts through units planned to expose students to various forms of art. The Physical Education teacher develops units that align to NC state curriculum standards for both physical education and health while encouraging active lifestyles. Students are engaged in building their skills and knowledge of popular sports and activities. The technology teacher develops lessons that require students to utilize these google tools to create slides, share documents, take tests, complete surveys and engage in discussions and student blogs as well as other activities. The school social worker not only provides in school counseling but also provides character development and supports teachers with leadership development activities. Individual counseling and support is available to every student in the school. All student receive coaching from the Executive Function Coach (EFC). Students will meet with the EFC, once per week in small groups, for 45 -60 minutes. The EFC will set individualized goals based on student need. This schools curriculum is aligned with our mission and target population.

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

The primary instructional strategies that this school will expect teachers to master that result in an increased academic achievement for students with learning difficulties, limited English proficiency and intellectual disabilities are multiple teaching methods. Teachers at this school must be proficient in the mastery of technology integration, project based learning, differentiated instruction, collaborative learning activities, inquiry based learning, GIST statements to summarize content, knockout test taking instructional techniques, Cloze Reading strategies to support reading comprehension, direct instruction, KIS strategies to develop textual evidence, Frayer model to support vocabulary development as well as other research based strategies to support EC. ELL & gifted students. In addition, Teachers will have mastery in collection of data, data analysis and data driven instruction, not only to have a clear understanding of school

expectations but to fully comprehend the relationship between assessment data and student performance. Lastly, Teachers, Executive Function Coach, EC Teachers and Learning Specialists are expected to be proficient in North Carolina Common Core Standards that promote student learning, character development and culturally responsive classrooms.

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.*

The ultimate goal of this school is to support students to develop proficiency in all areas of academics to meet graduation requirements. A chart will be provided to parents at the start of the school year to clearly illustrate the Math & Reading competencies required to successfully complete each grade level. NC State standards clearly define the curriculum requirements that students must meet in order to graduate from the general education program. All students will have the option to earn credit for demonstrating proficiency. This means that a student is given credit for successful demonstration of knowledge and skills through project based learning projects & assessments. The school counselor will work with each student to develop & implement the academic graduation plan. This plan includes the student's educational goals (the graduation pacing track, credits needed for graduation and credits needed for entrance to college), and outlines the intensive instruction program for each student. This school also provides students with the flexibility of three flexible pacing options for high school graduation Traditional Pace (K-12). (For all students) Students attend school throughout the entire school year from the month of August through June. Year Round Pace (K-12)-(For all students) Students take two fewer core courses than a typical course load in the Fall and Spring semesters but will be required to take remediation courses/coaching in its place (ie. remediation in: Math, English, History, ELL Reading/Writing) during that same time period to support proficiency and to increase student performance. The remediation support will follow the same curriculum for all of the core courses specific to each grade level but is modified to meet the student where he or she is at & build upon that knowledge to achieve a higher proficiency level. Students that choose this pacing option are also required to take two courses during the summer session for the two core courses that they did not take during the Fall and Spring semesters. As a result, when students take their two core courses during the summer months they will have the knowledge and tools needed to demonstrate student growth & proficiency. Accelerated Pace (9-12) For High school students that exceed grade level expectations. These gifted students attend Summer, Fall and Spring sessions full-time, enabling them to participate in paid internships & or graduate high school early once they have met the NC State graduation requirements. NC State graduation requirements are as follows: Future Ready Course of Study Requirements: 4 credits of English I, II, III, IV or a designated combination of 4 courses, 4 credits of Math I, II, III 4th Math Course to be aligned with the students post high school plans, 3 credits of Science: physical science course, Biology, Earth/Environmental Science, 4 credits Social Studies: American History: The Founding Principles, Civics and Economics, World History, American History I: American History II OR AP US History, IB History of the Americas, 2 credits World Language, 1 credit: Not required for high school graduation. A two-credit minimum is required for admission to a university in the UNC system, 1 credit Health/Physical Education, 6

credits Electives:Art Education, Career Technical, World language=22 Credits plus any local requirements. Future Ready Occupational Course of Study Requirements: 4 credits of English I, II, III , IV, 3 credits of Math:Introduction to Mathematics Math I Financial Management, 2 credits of Science: Applied Science Biology\* , 2 credits Social Studies: American History I American History II, 1 credit Health & Physical Education, 6 credits Electives: Occupational Preparation I, II, III, IV Elective credits Additional requirements:Completion of IEP Objectives Career Portfolio, 4 credits Career/Technical=22 Credits plus any local requirements.

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

The Achieving Excellence Academy of Charlottes academic calendar demonstrates the schools commitment to its mission of providing explicit, specialized instruction to support all students including disadvantaged youth, students with learning difficulties, limited English proficiency & intellectual disabilities to unlock each students full potential to achieve excellence in school, college and in life. This school operates on a year-round school calendar in order to (a) directly combat the learning slide/student regression that occurs every summer as a strategy to eliminate the achievement gap and (b) provide remediation for low performing students and to provide a challenging curriculum for gifted students. disadvantaged students typically lose significant ground over the summer; their skill level typically decreases which causes the achievement gap to widen between disadvantaged students and their more advantaged peers. Lastly, the calendar serves to keep parents informed of important dates that affect their child.

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

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

Achieving Excellence Academy of Charlotte utilizes Response to Intervention approach (RTI) to provide support to students that are not performing at the appropriate level. The RTI process begins with providing high-quality instruction and universal screening of all children in the general education classroom. Struggling learners are provided with interventions at increasing levels of intensity to accelerate their rate of learning. These services may be provided by a variety of personnel, including general education teachers, special educators, and specialists. At this school we utilize the following personnel in the RTI process: The Executive Function Coach (EFC) meets with students once per week to develop & implement individualized goals based on student need and to provide coaching/instruction to enhance executive functioning skills:(ie. teaching organizational skills, effective note taking, planning completion of projects etc). For limited English proficiency students, the EFC will work closely with the ESL Teacher to provide an

additional level of support through use of reconstructive language strategies. ESL Teachers will support EL learners to increase proficiency in Reading, Writing and oral language. The Learning Specialist (LS) will evaluate all student performance to develop strategies to compensate for learning deficits. The LS will provide remediation within the class setting. The LS will work closely with the EC teachers & ESL teachers to increase student achievement. The EC Teachers will co-teach, assess student performance, ensure appropriate accommodations, create IEP/BIP, 504 plans, facilitate team meetings & collaborate with professionals. The Director of Student Support Services (DSSS) will ensure compliance with federal, state regs pertaining to students with disabilities, supervise the LS, EFC, OT, PT, Speech, ESL & EC Teachers. The Family Services Coordinator will connect families to community resources. General education & elective teachers provide high quality, explicit, rigorous, differentiated instruction utilizing technology, project based learning and assessments to support student learning. The Social Worker will provide psychotherapy to support students in school & home. Data is collected continuous and progress is closely monitored. These interventions fall under RTI Tier one- Tier three depending on the need and severity. Within Tier 1, all students receive high-quality, scientifically based instruction provided by qualified personnel to ensure that their difficulties are not due to inadequate instruction. Students not showing adequate progress in the general education classroom with the above supports are moved to Tier 2 where the Intensity, frequency and duration of the interventions increase, in both individual and small group settings. Students who continue to show too little progress are in need of more intensive interventions under Tier 3. Under Tier 3 students are referred for a comprehensive psycho-educational evaluation to determine eligibility for special education services under the Individuals with Disabilities Education Improvement Act of 2004 (IDEA 2004). Lastly, the board of directors will adopt a written policy and procedures for RTI implementation.

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

*Learner (ELL) students, including the following:*

- a) *Methods for identifying ELL students.*
- b) *Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for ELL students.*
- c) *Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.*

In order to support English Language Learners at Achieving Excellence Academy of Charlotte early identification is the key. An initial home language survey (HLS) is administered to all students. The HLS is used to help determine if the student is a language minority student. If the process shows the students dominant language is English, then the student is not a language minority student. The completed HLS is filed in the students cumulative folder. According to The North Carolina State Board of Education policy (16 NCAC 6D.0106), for all children whose home language is not English, the WIDA Access Placement Test (W-APT) assessment of English language proficiency is then conducted. This test determines the students eligibility for ESL services. In order to measure student progress, the ELL ACCESS test is administered annually to determine the students current level of English language proficiency. Students who score below English proficiency levels are entitled to funding for instructional programs and appropriate

support services Support services to include: support from ESL Teachers, Learning Specialists and general education teachers through individual and small group sessions. Transitional Services: The LEP identification and eligibility for testing accommodations are noted in both the IEP and LEP plan/documentation. If the student is identified as an ELL student and the investigation reveals that the student has an existing Individualized Education Program (IEP), then the IEP Team, including ESL staff, reviews the current IEP & updates it as necessary. The W-APT is then administered with any testing accommodations documented in the students current IEP. W-APT results are reported to the IEP Team. After ELL identification and investigation has concluded, the ELL team meets to ensure that the needs of the ELL are being met. ELL team members role & responsibilities are the following: Principal: The principal plays a key role by ensuring that the (HLS) is completed during the registration process and that the school is compliant with federal regulations. The ESL teacher ensures that identified LEP students receive a full range of services: coordinates the W-APT & ACCESS testing, supports and coaches classroom teachers with differentiation techniques; and supports students to develop language acquisition and understanding the school culture in order to successfully participate in the school community. Classroom Teacher: Responsible for the quality of instruction and working with LEP team to develop the LEP learning plan, including direct delivery of instruction based on the ESL standards; monitor grade level performance and on-going communication with the team. If the student has an IEP, the ESL Teacher, EC Teacher and Director of Student Support Services work together to ensure that support services are provided, monitored ,evaluation, records maintained etc. School Counselor: interacts with ELLs ,ESL teacher and the LEP team to support parents and students understand NC Common Core Curriculum Standards and the requirements for graduation and provide support where needed. The Board will develop a comprehensive policy, procedure, and program for services to ELL students to support ELL achievement. Lastly in terms of lesson planning, teachers support students to build background knowledge, use explicit instruction and modeling, guided practice and ongoing assessments. Teachers will motivate ELL students by using pictures, real objects, maps, or personal experiences and teach tier 1,2 and 3 vocabulary words from the target content. In addition, cooperative learning groups,partner work,think pair share writing activities,graphic organizers and technology integrated project learning activities will be utilized in order for ELL to work together to learn from each other.

3. *Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*
  - a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
  - b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

Achieving Excellence Academy of Charlotte utilizes a non-biased, equitable approach to identification of gifted students. The identification strategy that this school utilizes includes multiple formal & informal assessments & aptitude assessments( in students native language), analysis of supplemental data, curriculum compacting and other strategies to identify & support gifted students, especially culturally and linguistically diverse gifted

students that traditional school systems at times fail to recognize. Through utilizing multiple criteria in assessment supports, this school will identify student strengths and develop appropriate instruction and provide students who might otherwise be overlooked, an opportunity to demonstrate that they can respond to advanced curriculum. Achievement tests determine what the students already have learned in comparison to their grade level peers. The following achievement assessments are specifically designed for the gifted population: Test of Mathematical Abilities for Gifted Students or Screening Assessment for Gifted Elementary Students Intelligence quotient, MAP assessments, & cognitive abilities aptitude assessments (Weschler Intelligence Scale for Children,) WISC-IV in Gifted Education. In addition, this school will also utilize supplemental data: (ie. Classroom observations, student cumulative records data, checklists, teacher nominations & portfolio data). Student Portfolios reflect student performance highlighting the strengths of student work and documents student improvement over a specific period of time. In regards to instructional programs, strategies, and opportunities that this school will employ to enhance gifted students abilities: All teachers are trained in differentiating instruction in order to challenge and motivate all students, including gifted AIG students. In addition to differentiating instruction, this school utilizes curriculum compacting to support teachers to make adjustments to curriculum for students who have already mastered the material to be learned, replacing content students know with new content & other activities. Furthermore, gifted students are provided opportunities to be taught on an accelerated pace, in flexible ability grouping to support gifted students to access appropriate levels of challenging instruction with varying levels of complexity. Flexible ability grouping allows students to learn alongside others who have learned at similar rates & possess similar levels of knowledge. To provide the emotional & intellectual support, this school's gifted program will include support programs to help gifted students from diverse backgrounds develop strong academic identities, learn coping strategies for dealing with negative peer pressure and gain resiliency for responding to challenging life circumstances (Ford, 2010). The School counselor, Teachers and administration may also facilitate small-group sessions before, during and or afterschool to address concerns and to provide support. According to (Ford, Grantham & Whiting, 2008), schools should provide opportunities for culture-specific groups of students with shared cultural background to interact together to promote a sense of belonging enhance self-esteem, unity and to challenge one another. (Olszewski-Kubilius, 2013). Lastly, in regards to monitoring and evaluating the progress and success of intellectually gifted students, this school utilizes ongoing, systematic data collection and evaluation measures to evaluate the effectiveness of the gifted program.

Ford, D.Y. (2010). *Reversing Underachievement in Gifted Black Students*, 2nd Ed. Waco, TX: Prufrock Press.

Ford, D.Y., Grantham, T. C., & Whiting, G. W. (2008). Culturally and linguistically diverse students in gifted education: Recruitment and retention issues. *Exceptional Children*, 74, 289-306.

Olszewski-Kubilius, P. (2013). Setting the record straight on ability grouping. *Education Week*. Retrieved from [http://www.edweek.org/tm/articles/2013/05/20/fp\\_olszewski.ht](http://www.edweek.org/tm/articles/2013/05/20/fp_olszewski.ht)

### **Exceptional Children**

*The public charter school cannot deny admission to any child eligible for special education services as*

identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.

### Identification and Records

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

Achieving Excellence Academy of Charlotte will provide a full continuum of exceptional children (EC) services in compliance The Individuals with Disabilities Education Improvement Act (IDEA, the Child Find mandate, Section 504 of the Rehabilitation Act and the general statutes pertaining to the education of students with disabilities. At this school we utilize the RTI process for identification of students eligible for special education services: RTI Tier 1, all students receive high-quality, scientifically based instruction provided by qualified personnel to ensure that their difficulties are not due to inadequate instruction. Students not showing adequate progress in the general education classroom with the above supports are moved to RTI Tier 2 where the Intensity, frequency and duration of the interventions increase, in both individual and small group settings. The school will adhere to the child Find guidelines and inform parents of the availability of the exceptional children services to discuss potential referral to the Exceptional Childrens program under RTI tier 3, especially if the student performance is not improving with supports from the Executive Coach, Teachers and Learning Specialist. The Executive Function Coach will support students to strengthen their executive functioning skills and the Learning Specialist will provide remediation within the classroom Under Tier 3 Student may be referred into the school exceptional childrens program by parents, teachers, and other school staff. Once the referral is submitted, the Director of Student Support Services will start the process to ensure that the comprehensive psychoeducational evaluation process is completed within 90 calendar days. Within 24 hours of receiving notification of a signed and accepted referral, the EC Teacher/Case Manager will create a confidential special education folder for the student and place the referral forms into the folder. All subsequent documents related to the student's evaluation, placement, IEP and special education services will be placed into the confidential folder in a specific order to make it easier to retrieve documents from the folder and to streamline the auditing process. The Director of Student Support Services (DSSS) will ensure compliance with federal, state regs pertaining to students with disabilities, supervise the EC teachers, ESL Teacher, Executive Function Coaches & OT, PT, Speech therapists, oversee the records management and request student EC records

from previous schools to ensure that the EC students continue receiving the EC services that they had received at a previous school. The EC Teachers will ensure that EC students are receiving appropriate services, accommodations and modifications as documented in the students IEP, In addition the EC Teacher will co-teach, assess student performance, ensure appropriate accommodations, create IEP/BIP, 504 plans, facilitate team meetings & collaborate with professionals. Data is collected continuously and progress is closely monitored. To ensure confidentiality, The following procedure are followed to ensure that EC student records remain confidential: 1. Folders are located in a secure area. 2. Folders should be maintained in a locked file cabinet. 3. Check-out/sign-in system are established to ensure that a folder can be located immediately. 4. This check-out/sign-in system should be kept near the file cabinet. 5. Only authorized individuals may check out confidential folders. Ordinarily, all personnel who are authorized to review confidential files. 6. Folders checked out and removed from the secure area are to be returned at the end of the school day. 7. All confidential folder documents must be kept in the folder at all times. New documents added should be placed in the folder as soon as signed 8. All individuals reviewing a student's confidential folder except the student's Case Manager must sign the Access Sheet kept at the front of the folder.

### Exceptional Children's Education Programming

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

Achieving Excellence Academy of Charlotte will provide a full continuum of education services to meet the individual needs of students with disabilities in compliance with The federal law, the Individuals with Disabilities Education Act of 1975, Part B to ensure that eligible students with disabilities receive a free and appropriate public education. IDEA appropriates federal funding for schools to provide educational opportunities for students with disabilities who qualify for these services under FAPE. It is this school's goal to provide students with the Least Restrictive Environment, ensure the appropriate allocation of resources and to provide a challenging learning environment for all students. According to FAPE, a student must be evaluated for eligibility as having one or more of the disabilities under IDEA eligibility requirements. The IEP team then meets to review the evaluation, reevaluation, and assessments of students identified as requiring special education. Each member of the IEP team is expected to work toward "consensus," which is usually a vote of agreement regarding the IEP content among all IEP team members. Students with disabilities will also receive appropriate related supplementary aids and services; to include interpreters for students who are deaf, readers for students who are blind, and door-to-door transportation for students with mobility impairments. This school will ensure the IEP is available to the parent/guardian, teachers & service provider responsible for implementing an

IEP prior to beginning services as a result of an IEP team meeting. The EC Teachers/Case Managers will ensure that EC students are receiving appropriate services, accommodations and modifications as documented in the students IEP, and will work with the classroom teacher to collect student performance data. In addition the EC Teacher will co-teach, assess student performance, maintain student IEP records & collaborate with professionals. Section 504 requires the use of evaluations and placement procedures that ensure that students are not misclassified or incorrectly labeled as having a disability due to inappropriate selection, administration, or interpretation of evaluation results. Therefore, this school utilizes current, valid, unbiased assessment tools administered by highly trained professionals to ensure accurate results. In addition, parents/guardians are notified of any evaluation or placement actions before the changes are implemented as part of due process. The due process procedures allow the parents/guardians to challenge evaluation and placement procedures and decisions. If parents/guardians disagree with the schools decisions, they are afforded an impartial hearing. Data is collected & analyzed continuously for progress monitoring purposes. The Director of Student Support Services, School Principal & Assistant Principal and EC Teachers/Case Managers in this school assume the responsibility and exercise leadership to ensure that IEPs are adhered to. Lastly, in regards to a proposed plan for related services, exceptional students at this school will receive special education and related services in a variety of settings including the regular classroom, resource class, executive function coaching class & remediation classes. Furthermore, students with disabilities will be educated with students who are not disabled & will participate with non-disabled peers in both non-academic and extracurricular activities. Specially designed instruction at this school is designed to meet the needs of all students with disabilities to include co-teaching (inclusion), small group classes, executive functioning coaching Instruction and related services that may include speech, occupational and physical therapy, modifications and accommodations to curriculum, in addition to technology integration.

### **Student Performance Standards**

1. *Describe the student performance standards for the school as a whole.*
2. *Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.*
3. *Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.*
4. *Provide the public charter school's exit standards for graduating **ALL** students. These standards should set forth what students in the **last grade served** will know and be able to do. Be sure to include plans for the "At-Risk" population.*

Achieving Excellence Academy of Charlotte (AEA) has set clear beliefs and a shared vision that all students are able to learn and it is up to us as Educators, Specialists, Counselors, Coaches, Administrators, parents and community members to unlock each students full potential. At AEA, we believe that the purpose of schools is to develop in each student the capacity to

think and reason & develop the skills needed to become a contributing member of society; We believe that every student, can and will learn if presented with the right instruction and supports to do so; We believe that this school is organized around the work of students rather than around the work of teachers, administrators & the Board of Directors; We believe in our teachers and therefore support them to be empowered, creative and to develop as educational leaders; We believe in our students and are committed to innovative technologies to prepare each student for the 21 century. Furthermore, we believe that a climate of high expectations exists not only for students at this school, but also for all staff and that high expectations are communicated to everyone in the community that this school serves, with incentives, recognition, and rewards in place to promote excellence. This schools clear beliefs and a shared vision are the focal point of our high student performance standards This school will implement research based, differentiated instruction and evaluation tools that educates, supports, challenges and assesses student growth and achievement that is in direct alignment with NC educational standards. In terms of data collection, Data is collected continuous through use of multiple measures both informal and formal. Informal assessments include: ie. exit tickets, classroom observations, think-pair-share, progress monitoring reports, STAR diagnostic assessment, IREADY diagnostic assessments, teacher made exams etc..and formal norm referenced standardized assessments include Beginning of Year, Mid year and End of Year benchmarks, NC EOG & MAP assessments and other state required assessments specific to each grade level. However, NWEA MAP assessments truly support this school to measure the level each student is performing at and calculates academic growth over a specific period of time. Furthermore, it also provides teachers with the crucial data that they need to adequately modify instruction to make student focused, data-driven instructional decisions. Students in all grades are tested three times per year in Math, Reading/ELA, Social Studies and Science. Exceptional Children performance goals are specified in their IEP or 504.plan and modified as needed. In regards to school grading system, this school utilizes a 10-point scale which is required by NC state for high schools, however, in order to ensure consistency throughout our school and to promote a clear, smooth transition for students as they move from elementary and middle school to high school, this school has adopted this grading system for grades K-12., including EC students. The 10-point grading scale is as follows: A(90-100) B (89-80) C (79-70 ) D(60-69) F(below 60). In regards to promotion requirements, it is the responsibility of this schools board of directors to adopt student performance standards that are in alignment with NC Course Standards. Elementary through middle school students are required to demonstrate grade level proficiency as defined by NC Standard Course of Study requirements for promotion. In order to be considered for promotion, these students must perform at or above grade level as identified by the state end-of-grade assessments etc. Students who have not met the passing criteria for the end-of-grade assessment will be eligible to take a retest after instructional interventions have taken place. If the student meets the passing criteria for promotion, the student will be promoted. to the next grade.

The decision to promote or retain a student shall be made using a variety of RTI interventions & assessments plus parent input to determine the students mastery of academic standards. The principal shall consider the pupils classroom work and grades, the students scores on standardized tests, and the best educational interests of the student. To receive a North Carolina

high school diploma, all students must meet all existing local and state graduation requirements, achieve a passing score on any state-mandated End-of-Course exams and successfully complete the Student Learning Graduation Project. The Service-learning graduation project will provide the students with authentic learning experiences where students not only learn the academic context but also learn how to apply that knowledge in the real world, to make a positive impact in their community & beyond. Through this final project, students develop leadership skills, develop a sense of community & citizenship, sense of responsibility and commitment to making a difference. This Service Learning High School Graduation Project has four parts: a research paper, product, portfolio, and oral presentation. Throughout the service learning project, Teachers, Parents and community mentors will support students in meeting the graduation requirements. They will serve as mentors to support student with research, development and implementation of the project. A research paper is where Freshman students demonstrate their research & writing skills on an important topic that is of interest to them where they will be challenged to seek solutions to a problem that is backed by credible research. The Product is where Sophomore level students participate in 15 hours of service learning activities relative to the students research topic. The portfolio is where Junior level students develop a portfolio to document all of their service learning and mentoring activities & service learning activities from the freshman year through Junior years & also record reflective thinking and evaluator evaluation on student performance. The oral presentation is where Senior level students communicate verbally to a panel consisting of parents, community members & teachers on what they had learned throughout their 4 year service learning experiences and how they their project has made an impact in their community & beyond. The Principals designee (ie. steering committee review committee, service learning mentors) will monitor and score the graduation projects utilizing NC Standard Course of Study state adopted rubrics. This project requires students to demonstrate what they know and what they can do with the skills acquired in high school. Throughout the students education there will be ongoing communication with parents. Parents will receive the Student Code of Conduct book at the beginning of the school year; they will receive quarterly report cards and progress reports as well as data reports from benchmark assessments. Parent conferences will be provided for face to face conversations related to student progress. All recommendations regarding special needs students will be made in conjunction with the IEP Committee or the Section 504 Committee. ELL will meet the same standards as all students, however, in accordance with federal law, English language proficiency cannot be the factor that determines whether a student has not met performance standards. All retention regarding ELL will be made in consultation with the English as a Second Language teachers, parents, student and school administration. In the event that a High School student is not promoted due to not meeting the graduation requirements, parents will be notified by a letter drafted by school administration informing the parent of student retention) and a team meeting will be held to determine the supports & educational placement options necessary to support student academic growth. Ongoing & effective communication with parents is essential to AEA operation.

### **Student Conduct:**

*Provide a brief narrative that disseminates how student conduct will be governed at the proposed*

charter school and how this plan **aligns** with the overall mission and proposed Education Plan of the charter school.

Be sure to include:

1. Practices the school will use to promote effective discipline.
2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.
3. An explanation of how the school will take into account the rights of students with disabilities in regards to these actions that may or must lead to suspension and expulsion.
4. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.

Achieving Excellence Academy of Charlotte board of directors will adopt a Student Code of Conduct policy. The Student Code of Conduct policy will be published in the Student Handbook that will be disseminated to all students on the first day of school to share with their parents. The Code of Conduct will be also be published on the school website and will be shared with students throughout the school year at school assemblies where administration will discuss the code of conduct with all students. When violations of the Code of Conduct occur, discipline will be administered immediately and consistently, in accordance with the code of conduct policy. Discipline Levels: Level I are repeated infractions of classroom management procedures and rules or misconduct that disrupts the educational process. (ie. Refusing to follow classroom rules after redirection by the teacher; refusing to participate in assigned activities, out of dress code etc..) Level I Consequences: Teacher/student or administrator/student conference, Parent conference or phone call, in-class disciplinary action or assignment. Withdrawal of student privileges or In School Suspension (ISS) for the remainder of the day. Level II Offenses: When a student's behavior does not change as a result of action taken on Level I the student is moved to Level II for discipline. Level II Consequences: Teacher, Principal & parent/ student conference, In-school suspension for one or two days, after-school detention etc. Level III Offenses: Level III misconduct are student infractions that are a little more serious in nature: (ie. copying the work of another student, leaving the classroom/building, using profanity toward others, obscene behavior, throwing objects, racially or ethnically offensive language and/or physical gestures to others etc.) Level III Consequences: Principal, student/parent conference, grade penalty (including receiving a 0 for an assignment for copying or cheating), after-school detention, In-school suspension for consecutive days, exclusion from extracurricular activities, loss of privileges etc..) Level IV Offenses: Level IV are acts of misconduct that seriously disrupt the educational process, endanger or seriously affect other students which may result in a violation of the law. (ie disorderly behavior which may prove to be detrimental to the school, harmful to health and safety, or inhibiting to the rights of others, threats (oral or written) that suggest a desire or intention to do bodily harm to another individual or to the property of another individual, trespassing, sexual assault, stealing, fighting, destruction of property, illegal drug use & drinking alcoholic beverages on campus extortion, gambling, failure to comply with assigned disciplinary consequences, etc..) Level IV Consequences: Any discipline technique outlined in Level III and or suspension from school for more than 2 days, citation by law enforcement personnel and discipline up to and including expulsion and alternative education placement). Suspension or

Expulsion of Students with Disabilities A student with a disability may be suspended for a period not to exceed three consecutive school days for each separate offense. Before students with disabilities are suspended or expelled, members of the IEP team, must meet to determine whether a link exists between the misconduct and the disability. A student with a disability will not be removed from this school to an alternative education placement for more than ten days unless the IEP team or 504 committee first determines whether the alleged behavior in question was related to the students disability. If it is determined that there is a connection, they must also determine what action is appropriate. The IEP team or 504 committee shall determine the instructional and related services to be provided during the time of expulsion. All teachers, staff and students will be trained in this schools code of conduct policy and will be expected to adhere to it.

No, we are currently in the process of identifying a feasible building that will meet their needs of our learners. We are working with a charter school builder that also provides financing and support to new charter school administrators.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
Is STEAM a delivery vehicle for core language learning, or is it an educational goal in its own right?	Lisa Huddleston	Instructiona
Which assessment strategies will be used and when? There is not much specificity here.		
Very ambitious and plan - really great structure and thought put in place. This will be the ideal curriculum.	Stephen Gay	Instructiona
Remains unclear what the STEAM focus of the school will look like in practice. How will this focus shape every day instruction?	Danielle Allen	Instructiona
What evidence does the applicant have that the selected curriculum will lead to improved outcomes for ELL, SWD, and EDS students?		
How will school leaders will assure the assessments created in grade level or content level PLCs are aligned to the rigor of the state standards and not just to the purchased curriculum, especially since they are teacher created? How will staff monitor the effectiveness of the math and ELA curriculum in order to know if it is meeting the needs of the targeted student population? What will grade level teams or content area teams do if students are not learning? The instructional plan does not speak to the specific instructional approaches necessary to realize the STEM (engineering, Architecture etc)program described in the mission section, why is this?	Tracy Kelley	Instructiona
If school is operating on year round schedule, the academic calendar should be revisited. Most calendar months have approx 20 instructional days, but the calendar submitted by the applicant lists up to 34 instructional days in a single month. Further, the track-in and track-out dates are not clearly defined in the calendar provided by the applicant.	Danielle Allen	Curriculum a
Applicant listed a number of primary instructional strategies but provided little guidance on how they will all work together to meet the needs of the target student population. For example, how will direct instruction work in tandem with project-based learning?		
There don't appear to be any STEAM-related courses (such as engineering) in the HS graduation requirements.		
Why does Appendix B2 refer to Arizona university entrance requirements?		
8th grade Science only being a half year - remember the State testing	Stephen Gay	Curriculum a
*Great plan to meet the advance match students! In middle school		
The curriculum provided and described does not align with the STEM focus area described in mission description, why is that?	Tracy Kelley	Curriculum a
Appendix B does not address curriculum across various grade levels. How will this curriculum be implemented for each different grade?	Lisa Huddleston	Curriculum a
What is the plan for the high school that they expect to add?		
In the calendar, student orientation will take place before new teacher induction. How is this practical, particularly in the first year?		
When identifying gifted students, how will the school find tools in all languages that might be needed? While an ideal arrangement, this sounds impractical in some circumstances.	Lisa Huddleston	Special Prog
Even with flexible grouping, how will teachers manage to differentiate the curriculum with 28 students in one classroom?		
Very in-depth plan	Stephen Gay	Special Prog
While you have stated the roles of staff members during the Response to Intervention/Instruction process, what data will you use to determine a student is at risk? How will you determine if a student is not successful with Tier 1 supports? Tier	Ginger Cash	Special Prog

2 supports? Tier 3 supports? You state that at Tier 3 a student will be "referred for a comprehensive psycho-educational evaluation to determine eligibility for special education". What if someone (parent, teacher, or community member) suspects a disability prior to Tier 3 supports? NC Policies Governing Services for Children with Disabilities states that an evaluation can not be delayed while interventions/supports are implemented. What processes/procedures will you have in place to safeguard against the delay of an evaluation?		
Meets state guidelines	Stephen Gay	Exceptional
The Executive Function Coach is also required to meet with every child in the school for 45-60 minutes each week in order to create/review individualized goals. The budget has 1 EFC in it. How will this person's time be split in order for them to provide supports for students in the EC program? What training (if any) will the EFC receive to provide these supports?	Danielle Allen	Exceptional
Detailed plan	Stephen Gay	Exceptional
What is your plan for providing the full continuum of services that includes regular, resource, separate, and homebound setting? When new students come in, what is your process/procedure for identifying students who are in need of special education services and/or accommodations? How will you obtain those records? You state that at Tier 3 a student will be "referred for a comprehensive psycho-educational evaluation to determine eligibility for special education". What if someone (parent, teacher, or community member) suspects a disability prior to Tier 3 supports? NC Policies Governing Services for Children with Disabilities states that an evaluation can not be delayed while interventions/supports are implemented. What processes/procedures will you have in place to safeguard against the delay of an evaluation? Confidentiality: When records are check out to authorized personnel, how will you ensure that the record remains secure until it is returned to the locked filing cabinet? What is your plan for providing related services such as psychological, speech/language, occupational therapy, physical therapy, etc?	Ginger Cash	Exceptional
How will the school implement related services programs? Will this be done through contracted personnel or direct employees?	Lisa Huddleston	Exceptional
How will smart goals be linked to NWEA/MAP goals and how will they be used and analyzed so the staff will know how well they are implementing the curriculum and if kids are learning and if students will perform well on EOY state assessments?	Tracy Kelley	Student Perf
Very detailed understanding	Stephen Gay	Student Perf
The application states that all students must be at or above grade level on EOGs and EOCs to be considered for promotion or graduation and then states that other factors will be considered by the principal. What role will EOGs and EOCs play in determining promotion?  There is not documentation to define what high-school graduation requirements are beyond the service-learning graduation project. What local requirements does the school plan to implement for high-school graduation? How do these mesh with the state requirements?	Lisa Huddleston	Student Perf
At what point/time period will parents be notified that their student is not going to be promoted? Will this meeting be convened in enough time for students to possibly make corrections and be promoted?	Danielle Allen	Student Perf
How will giving in-school suspension for level I infractions help at risk students excel? What are the goals of discipline at the school? How does the code of conduct promote those goals and how do the goals and code of conduct intersect with schools mission to "inspire, support, and enhance student learning...and prepare students for 21st century...and unlock students' full potential"? What age appropriate norms will be established and taught each day? How will the school establish and reinforce its core belief system in the context of its aforementioned character development program? How will students learn the schools' behavioral expectations in an age appropriate way so they can learn how to self regulate and monitor their own behavior?	Tracy Kelley	Student Cond
Because appropriate behavior and discipline for a first grader is very different than that of a high-school student, the school needs more specific information for students at different grade levels. How will the school differentiate discipline based on the age of	Lisa Huddleston	Student Cond

the student?		
What specific plans does the school have for the alternative placement that is mentioned?		
Has the board considered implementing a restorative justice discipline model? How does the outlined code of conduct reflect the school's commitment to serving a high-needs student population?	Danielle Allen	Student Cond
Meets State requirements	Stephen Gay	Student Cond
Very detailed information. Shows a strong understanding of students and their needs. Well planned out and plans to have resources in place to serve	Stephen Gay	Certify Educ

Reviewer	Score
Alex Quigley	
Alan Hawkes	
Austin Smigel	Pass
Cheryl Turner	
Danielle Allen	Pass
Steven Walker	
Stephenie Clark	
Lynn Kroeger	
Lisa Huddleston	Fail
Tracy Kelley	Pass
Joe Maimone	
Heather Soja	
Ginger Cash	
Stephen Gay	Pass

#### **IV. GOVERNANCE and CAPACITY**

(No more than ten total pages in this section)

**NOTE:** Please answer all sections completely. Do not use "same as LEA" or "whatever the law states". Lack of proper documentation could deem the application incomplete.

##### **Governance:**

##### **School Governing Body:**

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

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

*Name of Private NonprofitMunicipality:* Achieving Excellence Academy ofCharlotte

*Mailing Address:* 2230 E.Franklin Blvd

*City/State/Zip:* gastonia NC 28054

*Street Address:* Num 238 suite 100

*Phone:* 704-457-9293

*Fax:*

*Name of registered agent and address:* United States Corp Agent inc.  
6135 Park South Drive  
Suite 510  
Charlotte. NC. 28210

*FEDERAL TAX ID:* 83-1053821

##### **Tax-Exempt Status 501 (c)(3)**

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

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

X No

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

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

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

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

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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these professional licenses?</b>
Dawn Pascuito	Board President	MECKLENBURG	Adult Protective Services Investigator	Masters degree	N
Dele King	Board member	MECKLENBURG	Case Manager, MBA	Masters degree	N
Helen Lott	board member	GASTON	Marketing Specialist	BS degree	
Jeannine Carrington	Staff member/Board Secretary	GASTON	Founder/Executive Director	NC Licensed Administrator /dual Masters degree	N
Rod Fruster	Board member	MECKLENBURG	Behavioral Counselor	BS degree	N

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

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

The primary responsibilities of the Board of Directors of Achieving Excellence Academy of Charlotte is to provide oversight, promote the school's mission, lead planning and policy making, raise funds for the school, provide other resources to help implement the schools educational program and achieve charter requirements. The board is also responsible for ensuring that this school is fiscally sound. The governance structure consists of the Board President and 5 -8 board members. Every member of the board have equal voting rights; in the event of tie, the Board President vote will be the final decision. The Board of Directors role is to conduct the affairs of the school, subject to applicable education law, not for profit corporation law and the schools charter and bylaws. the executive committee typically consists of the president, vice-president, secretary and treasurer. The Board will work together to adopt a structure that stays true to the mission, goals and objectives of Achieving Excellence Academy of Charlotte and reflects NC charter school laws. The board chairperson/President ensures that the board fulfills its governance responsibilities and works with the school leader to achieve the mission of

the charter school. The role of the executive committee is to facilitate effective decision-making by the board that are comprised of a subset of board members. The executive committee is responsible for: Planning board meeting agendas, making decisions on behalf of the full board, and serving as a communication link with other board members. The Roles of Board Committees: The board authorizes members to serve on subcommittees to support the full board to reach its goals. The role of the Executive Committee is to facilitate effective decision-making by all board members. The role of the Finance Committee is to coordinate the boards financial oversight responsibilities. The role of the Personnel Committee is to evaluate the school leader and oversees employee grievance procedures. The role of the Board Development Committee is to recruit new board members and oversee ongoing training of existing board members. The role of the Resource Development Committee is to plan and implement the schools fundraising programs. The role of the Facilities Committee is to assess the short and long-term facilities needs and presents a long range facility plan to the board. The role of the Strategic Planning Committee is to develop a 3-5 year blueprint for our schools future. The board of Achieving Excellence Academy of Charlotte creates the policies that support effective school operations.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The board of directors consists of five to eight members. The board consists of individuals with skills including background in business, law, education, real estate, nonprofit organization administration, accounting or finance, parents, and local community leaders. These skills help ensure the success of the organization having individuals with experiences that can guide the board as a group. The primary board function is to establish operating policies and procedures for the nonprofit corporation, approve the hiring of school faculty, and provide oversight of the schools operations, budget, and curriculum. In addition, the Board of Directors role is to: Establish the mission and program direction for the charter school, approve goals and objectives designed to achieve those ends, develops and implement corrective action plan, assess compliance/progress in achieving educational and other outcomes agreed to in the charter, reviews performance data and identifies academic areas that need corrective action. Additionally, the Board of Directors role is also to evaluate the performance of the School Leader, reviews and approve accountability and Implementation plans, form strategic planning committee, and review operational financial statements that reflect strategic decisions. Lastly, a decision matrix will be developed by the Board. The purpose of the decision matrix to clearly define the authority, responsibilities and decision making roles of the board. This matrix supports our board to save time by clearly defining board members roles, increases the impact of board member efforts, helps to build stronger relationship between parents and school staff and referred prevents duplication of efforts. The Board of Directors have the final say in all important decisions that are made for this school so it is vital that the parents of the students that we teach are a part of the board. This school will support a strong partnership between the school and the parents. This

is best achieved when parents are involved in schools activities and through participation on the Board. Therefore this school Board will have at least one member that is a representative parent, as well as at least one person from the community(preferably a business owner or professional that can support this schools initiatives. The representative parent(s),will share their viewpoint on a variety of topics and will share their background and knowledge to make valuable contributions to the board meetings.It is the School Leaders responsibility to keep the board informed about student achievement to develop and lead the school to support student achievement.The board will receive training interpret student assessment data in relation to student achievement and school instructional program effectiveness.

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

The founding board consists of a individuals from Mecklenburg County that were obtained from multiple sources to include:Volunteer Match([www.Volunteer Match.org](http://www.VolunteerMatch.org)), BoardNetUSA([www.Boardnet usa.org](http://www.Boardnet usa.org)),The Taproot Foundation ([www.Taprootfoundation.org](http://www.Taprootfoundation.org)),The United Way of Central Carolinas([www.uwcentralcarolinas.org](http://www.uwcentralcarolinas.org)),twitter ([www.twitter.com](http://www.twitter.com)), linkedin ([www.linkedin.org](http://www.linkedin.org)),facebookpage(/[www.facebook.com/Achieving-Excellence-Academy-of-Charlotte-524122481358101](http://www.facebook.com/Achieving-Excellence-Academy-of-Charlotte-524122481358101)),school website ([www.achievingexcellenceacademyofcharlotte.com](http://www.achievingexcellenceacademyofcharlotte.com)) and through discussions with community members from various Charlotte Mecklenburg Churches. There are several highly qualified individuals that want to become a member of this school board & subcommittees once this charter has been approved. In the event that a board member wishes to roll off the board,a replacement will be appointed within one month. This board will recruit new members by having existing board members propose prospective board members that share the mission and vision of this school,have a good understanding of the community that we serve and its needs,demonstrate a passion for our cause and a willingness to commit time for board meetings, committee meetings, planning sessions, special events. Also,prospective board members must be a team player and have the talents and skill set that this board needs. Once the prospect is identified by the Board,the prospect is then invited to fill out an application and attend a board meeting,at which point they are asked to join the board, voted in to the board and will begin their board orientation program within the next few weeks and will be given a tour of the school facility and opportunity to meet staff,parents and students.

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

The board of directors shall meet quarterly in the months of September, November,January, April, July on specific dates to be selected by the board.via video web conferencing and in person when applicable. The required number of meetings is set forth in the by-laws. The board shall conduct a full, properly noticed meeting, with a quorum present.

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

In order to equip this school board with the necessary knowledge to fulfill

their responsibilities, Achieving Excellence Academy of Charlotte board members will receive the following trainings: Building a Highly Effective Governance Team, this training covers: recruiting, onboarding board members, board leadership/visioning, board roles & responsibilities, leveraging individual and governance team strengths, open meeting law, problem solving/decision making and building relationships. Strategic Planning covers: board and community relations, engaging the public, effective communication, engaging businesses. Policy Development covers: development of data driven policies that support student achievement. Personnel Management covers: Personnel recruiting, hiring, board evaluation on board of directors effectiveness, setting performance expectations and Evaluation of school administration. Financial Management covers: Understanding audited financial statements, developing sound financial policies, planning for long-term fiscal sustainability. Moral and Ethical Leadership covers: Building an ethical board: ethics Laws, conflicts of Interest, moral obligations and ethical responsibilities of board members. Financial Compliance and Accountability covers: Internal Controls, and budgeting, resource planning and development to support academic accountability, understanding of performance expectations and compliance. Instructional programs covers: School mission, vision, staffing, curriculum, funding, academic goals, resources, job descriptions, assessments, student population & community served etc. Lastly, all of the above training documents will be stored in a Board of Directors Training manual that will be provided to each board member and the original one will be stored on site within the school leaders office.

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

A conflict of interest policy is adopted by the Board of Directors to ensure that the personal or professional concerns of board members will not affect their ability to put the welfare of the Achieving Excellence Academy of Charlotte before their personal benefit. However, when an apparent conflict of interest is present, this board will reflect on their conflict of interest policy to preserve the integrity of this board. Potential conflict of interests may include: Financial interest in any business from which the school obtains goods or services, competition by the individual, directly or indirectly, with the School in the purchase or sale of property, representation of this school by a board member in any transaction or activity in which the individual, directly or indirectly, has a financial interest, use of confidential information about the School for the personal profit or advantage of the individual or any person, and lastly acceptance of gifts or favors from any person who seeks to do business with, or is a competitor of this School. A board meeting will be held and the following steps will be followed: 1. Full disclosure: Board members involved in the conflict of interest will make known their connections with outside partnerships or affiliations that are resulting in a conflict of interest and it will be recorded in the meeting minutes. 2. Documenting decisions. Board members decision will be documented to reflect how that decision is in the best interests of the school. 3. Abstention from discussion and voting. Board members who have an actual or potential conflict of interest will not participate in discussions or vote on matters related in any way to matters involving the area of conflict. 4. Self-monitoring. Periodically & annually,

the conflict of interest policy should be an agenda item to openly discuss and potential and or future conflicts of interest. The policy is signed and dated by each board member and a copy of the policy will be given to each board member to place in their policy manual. Also, a copy of the policy will be placed in the board of directors policy manual that will be stored at the school.

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

In order for this board to operate smoothly, it is essential that each member within the Board of Directors truly understand the authority, responsibility and accountability for the various board roles & functions for effective decision-making. It is also essential that all involved members of the organization have a clear understanding of the individual that must be consulted before a decision is made and who should be informed of a decision when it has been made. To support this effort, the board directors will utilize a decision matrix to support effective, ethical decision making. This decision matrix clearly defines the authority, board member roles, while creating opportunities for input and decision-making. The decision matrix also illustrates who makes the decision, who is solicited for input, who needs to be informed of the decision in several different topic/categories. The school board will give notice of new policies being developed by placing the item on the agenda. The board will then meet to develop the policy and seek legal counsel to review & or revise the policy to ensure that it is in compliance with education law. Next, the board of directors will review the final document and vote to adopt the policy or deny it. If approved, the policy will be effective on the the date stated in the motion. All policies will be subject to annual review and approval by the school board. Each school board member shall have access to this policy manual, and a copy shall be placed in the office. Lastly, a separate document will be utilized to summarize and track all of the major governing decisions made by the Board of Directors and secured in the policy manual, to ensure that the Board of Directors are meeting its legal and fiduciary responsibilities. While decisions can be delegated to school management and staff, the board of Achieving Excellence Academy of Charlotte has the final say and is responsible for policy determinations.

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

The board shall be empowered to create advisory & subcommittees. Effective committees are indispensable as they do the bulk of the work of the charter school board such as increasing the involvement of the board members by providing an opportunity to use their skills and experience, providing a training ground for future leaders for both current board members and non-board members, enhances the visibility and outreach, provides an additional option to channel information from the parents, students, community and school staff to the board and provides a forum for board members to discuss emerging issues in-depth. Each committee formed by the board will have a written committee description in place. The committee description summarizes what is expected of each committee, its purpose, composition, selection procedure and the specific duties. The committee chair/Board President will ensure that the committee is in sync with the board as a whole. The committee chair is responsible for preparing meeting agendas, assigning

responsibilities and following-up to make sure assigned work is being done. Each committee is generally comprised of three to eight members and can be a mix of board and non-board members. The committee calendar will also be tied into the overall annual board calendar so that efforts are unified and coordinated for maximum impact. Committees can also appoint task forces to conduct a search for a new charter school leader, make recommendations on major policies, explore a new strategic alliance, plan a capital fundraising campaign and other high priority projects. The Executive Committee is composed of the board officers, the chairs of the standing committees and a number of members as specified in the bylaws. Members are elected by the entire board. The chief function of the Executive Committee is to plan the work of the board and to exact responsibility from members by providing agenda and other guidelines for board actions. Another chief role of the Executive Committee is to provide guidance for the organization between board meetings. The Standing Committees analyzes issues within their areas of jurisdiction and make recommendations to the board. The Finance Committee is led by the board treasurer to oversee the creation of the budget, monitor and report on the financial status and activities of the agency, ensure the financial policies and practices are followed. The Governance Committee oversees the identification, recruitment, orientation, training, and retention of board members. This committee looks for opportunities to strengthen and evolve the boards effectiveness, capacity, composition, and ability to lead the organization into the future. A Fundraising/Development & Marketing Committee works closely with staff to create and implement the financial resource plan that will guide the staff and boards activities in seeking out and securing funding from diverse sources. In addition, this committee develops and implement a marketing communications activities that articulates the target population to market to. This committee may also take the lead in working with the other board members to explore the best ways they can contribute to the fundraising effort. The Outreach Committee /Task Force creates and implements recruitment and retention programs to increase community support in school initiatives and activities, secures community volunteers, mentors and community partnerships and strengthens the reach of the school under the leadership of the committee chair and the Board President. Lastly, the board shall appoint a Parent Advisory Council who primary function is to organize parent volunteers for the school. The Parent Advisory Council shall make recommendation to the School Administrator and shall meet with the School Administrator each month.

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

The Board highly encourages the informal resolution of complaints and grievances. The Board will use proactive strategies to ensure constructive two-way dialogue with students, parents, staff and the community as a means to link the entire community around the goals of the Achieving Excellence Academy of Charlotte. Individual Board Members are free to receive complaints and grievances, they will remain neutral while the dispute is pending. The grievant may file a grievance regarding any issue the individual believes adversely impacts them, including decisions of the school administrator, conflicts between employees, conflicts between parents and employees, and conflicts between students and employees. In order for complaints to be resolved in an orderly, consistent fashion, the following guidelines will be observed: 1. Complaints or grievances brought to an individual Board Member will be referred by that Board Member to the Board President and will be immediately added to the board meeting agenda. If the board is not scheduled to meet, a special meeting will be scheduled to

address the grievance. 2. Where the concern or complaint directly pertains to the Boards own actions or policy, the person making the complaint may request Board Members to place it on the Boards agenda for discussion by the Board. 3. The School Leader or Executive Director, will periodically inform the Board of all complaints and grievances which were referred to this individual designee to be added to the agenda. The full Board of Directors may conduct a full hearing on any appeal or direct grievance. The grievant shall not have the right to legal counsel, paid by themselves, at any hearing. The parties in a grievance shall have the right to present evidence, witnesses, including documents and other information. 4. The board of directors decision is final and the person who initiated the complaint or grievance will be advised of the decision in a timely manner in written form. The Board cannot discuss any confidential information publicly, such as a personnel. parent or student grievances or any confidential information about a student. Any appeals and grievances shall be subject to N.C. Open Meetings Laws and the N.C. Public Records Act.

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

#### Include in the Appendices:

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

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

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

**Not Applicable**

If the Charter School plans to contract for services with an educational management organization (EMO) or charter management organization (CMO), please specify the contact information below.

Name of the Company: Charter School USA  
Address: 800 Corporate Drive  
Fort Lauderdale, Florida NC 33334  
Website: [www.charterschoolusa.com](http://www.charterschoolusa.com)  
Phone Number: 954-202-3500  
Contact Person: Ms. Wise  
Fax: 954-202-3502  
Email: [mwise@charterschoolusa.com](mailto:mwise@charterschoolusa.com)

1. *Explain how the contract with the specified EMO or CMO will be in the best educational and financial interest of the charter school. Please include an executed copy of the management agreement as Appendix L of the specified EMO or CMO.*

Achieving Excellence Academy of Charlotte may contract will Charter School USA to provide financial reporting, data collection, marketing for new students, teacher recruitment and training, curriculum development, equipment and educational resource financing and endless support for charter school administration and board of directors. At the time of this charter application, Achieving Excellence Academy of Charlotte is not in contract with Charter School USA only in talks with Charter School USA staff. There is no agreement with Charter School USA at the time of this charter application but there may be in the near future.

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

Achieving Excellence Academy of Charlotte proposes to contract will Charter School USA due to their wealth of expertise developing and managing successful charter schools. Charter School USA supports charter schools with feasibility studies, securing community support, facility acquisition, charter applications, curriculum development lesson and learning plan implementation, classroom management, performance monitoring, customized improvement plans, human resource management, professional development, employee payroll and benefits personnel policies and procedures, government compliance and reporting, financial management, accounting systems, budget development , governmental reporting and analyses, risk management, Fundraising, marketing, student enrollment & tracking, financing and much more. There are no fees associated with contracting with Charter School USA. No other EMO's were contacted because Charter School USA is highly regarded as the top EMO in this region due to their high success rates. However to be clear, Achieving Excellence Academy of Charlotte Charter school has not signed any agreements with a EMO or CMO. We are only in the process of determining if our school should consider contracting with the EMO(Charter School USA).

3. *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 is the highest and lowest performing school of the EMO/CMO? Why are these two schools so different in overall achievement?*

Charter School USA manages over 80 advanced accredited charter schools throughout the United States, serving approximately 90,000 low income students, with 60% of the student population qualified for free or reduced lunch. According to school performance data, Cabarrus Charter Academy in North Carolina opened in 2014 and managed by Charter School USA . School performance data has indicated that with Charter School USAs support, Cabarrus Charter Academy had exceeded student performance goals and expectations at a rate of approximately, 15 points higher than the local school district. In comparison, data on the Charter School USAs lowest performing school was not as apparent as the many successful schools that they are currently managing however, there are three schools listed on the Charter School USA website as turnaround schools. However, with ongoing support through Charter Schools USA, these three schools have made

tremendous performance gains as evidence on the MAP testing data.

4. *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.*

According to the phone conversations and email correspondence with the EMO, the EMO will be responsible for the day to day financial management & reporting of the school including payroll, curriculum development, board member training, marketing and student enrollment. The Board of Directors will retain responsibility for policy development, school performance monitoring, grievance, fundraising, community outreach and monitoring the the EMO effectiveness, among other board of directors duties that are outlined in more detail, throughout the governance part of this charter application.

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

There is no relationship existing between the charter school employees and Charter School USA or any other Management Organization.

6. *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.*

At the time of this charter school application submission, Achieving Excellence Academy of Charlotte was not in contract with the EMO (Charter School USA), therefore does not have the contract information to provide in this charter application. In the near future when this school enters a contract with Charter School USA, the contract details will be immediately shared with the NC DPI office of Charter Schools.

7. *Is the facility provided by the EMO/CMO? N*
  - If yes, include as Appendix J a detail of the buyout formula for the board of directors to purchase the facility if a buyout formula or process exists.
8. *List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.*
9. *Provide as Appendix K 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 financial standing with either financial statements, bank letter, D & B report or credit rating.*

According to the North Carolina Department of State Treasurer 2018 Illustrative Financial Statements for Charter Schools, the fund balance and surpluses for each school managed by the EMO is listed below:

2017-2018

Cardinal Charter Academy projected fund balance was approximately \$988,000  
Cabarrus Charter Academy projected fund balance was approximately \$3000.000\$  
Langtree Charter Academy projected fund balance was approximately \$3,600,000.

Iredell Charter Academy projected fund balance was approximately \$2,600,000.  
Kannapolis Charter Academy projected fund balance was approximately \$200,000.

Union Prep Academy projected fund balance was approximately \$200,000.

2016- 2017

Cardinal Charter Academy audit fund balance was approximately \$378,000  
Cabarrus Charter Academy audit fund balance was approximately \$460,000.  
Langtree Charter Academy audit fund balance was approximately \$600.000

2015 - 2016

Cardinal Charter Academy audit fund balance was approximately \$200,900.  
Cabarrus Charter Academy audit fund balance was approximately \$300,800.  
Langtree Charter Academy audit fund balance was approximately \$400,900

According to Charter School USA performance data obtained from their website in September 2018, Cabarrus exceeded state proficiency rates by 16% in reading, 18% in math, and 14% in science. This is a net advantage of over 48% points. Langtree exceeded state proficiency rates by 20% in reading, 19% in math, and 7% in science. This is a net advantage of over 46% points. Langtree and Cabarrus outperformed the state, districts and local area schools on College and Career Readiness levels. At the county level Cabarrus exceeded overall proficiency in reading by 12%, in math by 14%, and in science by 12%. This is a net advantage of 38%.

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

**X Not Applicable**

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

**X Not Applicable**

### **Projected Staff:**

*Below, please outline a list of positions anticipated for the charter school (e.g., principal/director, finance officer, administrative support staff, teachers (part-time and full-time), paraprofessionals/teaching assistants, clerical, and maintenance). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings and align with the proposed budget.*

Achieving Excellence Charter School anticipates to have 300 students registered. The following staff position anticipated for the first year of school are the following: The School Leader(1):For the first five years the Founder/Executive Director will serve as the School Leader due to being a licensed NC School Administrator with 20 years of non profit leadership experience,5 years as an EC administrator and 8 years of teaching experience, in addition to setting the direction and living the mission of Achieving Excellence Academy of Charlotte Charter school.This will ensure that the school is operating efficiently and maintaining an environment that delivers quality instruction, develops teachers, and enables ALL students to exceed growth each academic year,while maintaining a climate of high expectations for academic excellence. The makeup of the school staff

includes: Technology Coordinator(1),Technology Specialists(2 part-time),Director of Student Services(1),EC Teachers(2 full time),ESL Teachers(1 full-time & 1 part-time (depending on student need),Classroom teachers 10-12,Teacher assistants(4), Learning Specialist(2), Executive Functioning Coach(2),Dean of Students(1),Behavioral Management Specialist(1),Director of Instruction(1), Instructional Facilitators(Math/Literacy(2)),Business Manager(1), Finance Secretary(1),Custodial Staff(1 full-time & 2 part-time),Cafeteria staff(2 part-time),Counselor(1),Nurse(1),Speech,occupational and Physical therapists (contracted services(3))and a School Psychologist(Contracted services(1).

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

Include the following information for the proposed charter school:

The board has several strategies to recruit and retain high performing teachers. For example,The board will develop a hiring rubric to follow specifics steps in the hiring process. For example, the board will work with the school founder to schedule multiple teacher recruitment fairs throughout the school year;advertise on indeed.com, monster.com,linkedin.com, and other online job boards;interviewing teachers through the use of video interviewing(web-conferencing) to recruit teachers from multiple areas;face to face interviews,providing high quality prospective teachers with the option of signing open contracts to hire the most qualified teachers when there is an opening;providing competitive salaries with benefits;providing a very supportive, positive, technology enriched environment for students and teachers to develop as well as providing teachers with the opportunity to take on leadership roles within the school.

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

The School Leader, CEO and Board of Directors will work together to insure that the school is meeting all expectations that are in direct alignment with the mission and vision of the school. The board of directors will monitor the functioning of the school while the school leader manages the day to day operations of the school, reporting back to the Board and working together with the board for the benefit of the students.

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

The board's procedures for hiring and dismissing school personnel is as follows:1. The candidate completes the application online or in person onsite and submits it for review. 2. All applications are screened to select the appropriate candidates for a phone interview. 3. A select number of qualified candidates that have successfully passed the phone/web conferencing interview will be scheduled for a face to face panel interview containing 1-3 board members,teachers and a member of administration where the teacher candidate will also teach a lesson to a class for the specific course and grade level that they are applying for. 4. All interviewees will be scored and the highest scored will be considered for the position contingent upon a clean background check and good reference check. The personnel name will be submitted to the board for the board president to approve the hiring of the personnel. In regards to dismissal of personnel,staff will be notified of the dismissal in a writing and verbally. If there is an employee grievance, the employee can submit the grievance to the Human Resources dept which will then be shared with the board of directors for review by Human Resources and the Board of Directors, to ensure that the appropriate decision was made following the policies and

procedures of the school.

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

In order to retain high quality personnel, the salary package and benefits will be competitive. The school will offer all full-time staff with a retirement plan, 3% annual raises and bonuses that are in accordance with satisfactory performance reflected on each staff person's performance evaluation matrix. The Salaries are as follows:

School Leader: \$70,000-\$100,000  
Executive Director: \$75,000- \$120,000  
Asst. Administrator: \$ 55,000- \$70,000  
Director of Student Support Services \$42,000-\$48,000  
Office Assistant: \$20,000-\$35,000  
Business Manager: \$40,000-\$48,000  
Instructional Facilitator: \$35,000-\$45,000  
Teachers: \$35,000-\$50,000  
Teacher Assistants: \$25,000- \$35,000  
Learning Specialist: \$35,000- \$42,000  
Executive Functioning Coaches: \$35,000- \$42,000  
Technology Coordinator: \$35,000-\$42,000  
Technology Specialist: \$15,000- \$30,000  
HR Generalist \$25,000 - \$40,000  
Behavioral Management Specialist-\$30,000- \$42,000  
Cafeteria staff: \$14,500- \$20,000  
Finance Secretary: \$35,000- \$40,000  
Custodian: \$24,000-\$38,000  
School Counselor: \$35,000- \$46,000  
Nurse: \$37,000- \$47,000

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

The procedures for handling employee performance issues, grievances and termination are as follows: 1) Counseling: The employees direct supervisor along with the HR Generalist and or School Leader will counsel the worker about his or her work performance. After step one has occurred and upon walkthroughs/observations it is determined that the staff member continues to perform in an inappropriate or inadequate manner, the next step is a verbally reprimand. 2. Verbal Reprimand: The staff member will meet with his or her direct supervisor, HR Generalist and or Principal to discuss current work performance and to provide opportunities for Coaching, job shadowing and mentoring. If after coaching and mentoring activities that include a staff improvement plan, the next step will be a written warning. 3) Written warning: A written warning is a document that will outline the area which needs improvement, support provided from administration, activities to support performance growth and a timeline that outlines when improvement is needed to be shown or it may lead to further disciplinary actions up to an including termination if expectations within the written warning are not met. 4. Written Warning: A second written warning may be written to provide the staff person with 15- 30 additional days to improve performance. At this stage the staff member will meet with his or her coach twice a week and once a week with his or her Mentor. If the staff member performance still hasn't improved after the improvement plan, verbal warning and two written warning, the staff member may be terminated. 5) Termination: If the staff members continues with the poor performance, the school leader and or Executive

Director will terminate the employee's employment. If the staff member disagrees with the school's decision to terminate, the staff person may submit a written grievance to the School Leader that will be submitted to the Board of Directors Grievance Committee for the final decision.

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

The following position will have dual responsibilities. 1)The School Founder/Executive Director will serve as the school leader for a period of 5 years, due to being a licensed NC School Administrator with 20 years of non profit leadership experience,5 years as an EC administrator and 8 years of teaching experience, in addition to setting the direction and living the mission of Achieving Excellence Academy of Charlotte Charter school. 2) Office Assistant will act as the school receptionist and be responsible for maintaining student records within Power School.The Business Manager is responsible for the operations of the school in terms of the managing school property and safety,maintaining employee records, conducting background checks,streamlining systems,data analysis of student performance,supervision of custodial staff, cafeteria staff,office assistant.All positions are funded through state and federal funding.

*8. Describe the plans to have qualified staffing adequate for the anticipated special needs population, means for providing qualified staffing for ELL and gifted students.*

Achieving Excellence Academy of Charlotte Charter School focus is to provide a rigorous interdisciplinary, technology enhanced,specialized STEAM curriculum to support economically disadvantaged students with learning difficulties,limited English proficiency & intellectual disabilities to matriculate through the North Carolina Common Core curriculum at a pace that supports student growth and enhances student performance. In order to provide adequate staffing to meet the school expectations, we will hire quality teachers & specialized support staff that are trained & skilled in supporting the development of students with special needs,learning difficulties,limited English proficiency, and gifted students.For example, Executive functioning Coaches, Instructional Facilitators, Learning Specialists, EC Teachers,ELL Teachers & Teacher Assistants to support these students to meet or exceed student performance goals. To further support ELL & gifted Students, our student-teacher ratio is 14:1.

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

School Leader: The Principal works with the Board to clearly define and articulate the schools mission and vision. The Principal develops strategies to translate school goals into implementable action items with attainable measures. The Principal oversees the schools day-to-day operations and long-term strategic direction to ensure all students excel. The Principal will analyze the longitudinal performance of individual teacher and school-wide functions to ensure there are ongoing improving trends. The Principal must be knowledgeable of NC Common Core Learning Standards,title one schools and have a strong understanding of strategies to support ELL,EC students and students with learning difficulties. Assistant Administrator: Work closely with the Principal and other school program supervisors to assure the safety and effectiveness; provide leadership in the school program regarding all areas of curriculum and assessment, including both academic and recreational programming;oversee all academic assessment including statewide assessments;

provide consultation and training to all school staff regarding issues of curriculum, assessment, & program development; assist in teacher hiring, orientation, and professional development; work with educational coordinators to develop calendar for school-wide events, special programs, and assemblies; work with other supervisors to ensure that the physical appearance of the school buildings reflects the positive values and programming of the school; work in close cooperation with the multidisciplinary team to ensure alignment and consistency in treatment and programming across programs. The EC teacher is responsible for developing lesson plans, adapting materials and designing activities to assist EC students develop appropriate academic, behavioral, and social skills and to meet their IEP goals. Classroom Teachers are responsible for developing engaging lessons that develop and motivates students to meet educational outcomes. Executive Functioning Coaches will assess students academic work and conduct classroom observations to individualize a plan to teach students how to organize, plan, prioritize, manage time, maintain focus, self-assess, and study efficiently. The Executive Functioning Coach must have a minimum a Bachelors degree and or related experience. Learning Specialist: The role of the Learning Specialist is to support students with different learning styles by providing intervention and remediation; support teachers in their efforts to advance students with different learning needs within the classroom; work with parents, students, and outside professionals in order to better support special needs students. The teachers broad area of responsibility is to ensure that each student may learn and flourish academically, socially, emotionally, and spiritually in a nurturing and responsive classroom and school environment. Lastly, the Learning Specialist assists teachers in the classrooms to help adjust, modify, and enrich curricular approaches to improve pedagogy and increase student learning. Learning specialist must have at least a Bachelor degree and related experience. The Technology Coordinator is responsible for training, modeling, and supporting teacher to integrate technology in the classroom to improve student achievement and to ensure that every student meets and exceeds the NC Common Core Learning Standards. The Technology Coordinato updates staff skills for effectively instructional activities. The Technology Coordinator implements, coordinates, and evaluates the integration of educational technology as tools to support instruction. The Technology Coordinator position requires a Bachelors degree and or related experience. The HR Generalist: The HR Generalist performs human resources related duties at the professional level & will carry out responsibilities in the following areas: employee relations, training, benefits, compensation, recruitment/selection, development & implementatation. Director of Student Support Services position requires a Bachelor's degree or higher from an accredited college or university. The Director of Student Support Services will also have teaching experience and will work with the School Leader to actualize the schools vision in terms of meeting all students needs, both behaviorally and academically. In addition to creating and manages strong systems and structures to support teachers in executing this vision to meet our school goals. The DSSS also helps to design professional development for our teachers, guiding them to ensure they are differentiating to meet the needs of all learners and implementing IEPs, 504s, and LEPs with fidelity. In addition, analyzing student data and facilitating next steps to ensure continued achievement across the school; Overseeing school and regional compliance with state and federal laws regarding special populations; Leading, managing and coaching the Student

Support Services (SSS) Team;providing professional development and resources to all staff in the areas of Special Education and teaching English Language Learners;Serving as an active member of the School Leadership Team, meeting weekly for strategic planning, and discussion of school initiatives,Develop and manage the Intervention and Special Education strategy, implementation, plan and calendar in order to coordinate EC and ELL services and strong school-wide interventions;Analyzing the performance of students across school on MAP, Benchmark, and internal assessments to determine students who require additional intervention support and progress monitoring;Oversee delivery of instruction as indicated on IEPs to ensure an integrated service delivery system; Work cooperatively with lead classroom teachers, interpreting the abilities and disabilities of these students, assisting in classroom intervention strategies, modifying general education curricular as necessary, and assisting students with regular class assignments;Monitor and promote integrated service delivery in inclusion and resource setting and supervise EC teachers,ESL Teachers and support staff. Business Manager:The business manager's role ensures the implementation and maintenance of clear operational systems that allow the Principal and Assistant Principal the opportunity to focus on students, families and instruction. The Director of Operations is an individual who embraces innovation and continuous improvement and relishes the challenge of finding ways to work smarter. The Business Manager will report to the Principal. Responsibilities will include, but are not limited to: Recruit and Enroll Students, cafeteria,custodial,school security,transportation and daily schools,operations. The business manager will Work in close partnership with Principal and leadership team to ensure aligned procedures for school are working properly and adhered to. Both the School Leader and Asst. Administrator positions require at minimum a Bachelors degree along with a NC School administrator licensure. The Business Manager position requires a Bachelors degree and or related experience. . The Technology Coordinator position requires a bachelors degree and or related experience.Teachers positions require a bachelors degree,a valid teacher license and at least 3 years of teaching experience. Learning Specialists and Executive Functioning Coaches must have attained a Bachelors degree or higher from an accredited college or university;Masters degree preferred. In addition, they must have a strong knowledge base in the area of learning differences,especially dyslexia, dysgraphia, Autism, dyscalculia,as well as a deep knowledge base regarding ADHD. Desirable candidates will also be knowledgeable in early intervention,RTI,assessments,acquisition of reading,writing,mathematics and organizational skill development.

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

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

The School Leader,HR Generalist,Asst.Administrator,Director of Student Services will be responsible for maintaining teacher licensure requirements and providing ongoing professional development.

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

All Teachers at Achieve Excellence Academy of Charlotte will participate in

the North Carolina Teacher

Evaluation Process to train staff, evaluate the teacher's performance in relation to the North Carolina Professional Teaching Standards and to provide professional learning opportunities. Professional learning opportunities will enable our teachers to earn CEU credits for certification renewal and to contribute to fulfill each teachers Professional Development Plan. The School administration will conduct walk-throughs daily and performance evaluation annually which includes an employee self assessment. New teachers and teachers with less than 2 years of teaching experience will participate in the Beginning Teacher Support Program. This program includes peer observation experiences with mentor and other teachers. Observations will be done during the school day and will be arranged between the new teacher, mentor teacher and administrator. These observations may take place during a plan time, during recess/lunch, by using a substitute already in the building with a plan time, or as otherwise arranged within the building. Teachers with less than three consecutive years of employment will be assigned a Mentor.

New Teachers and those with less than 2 years teaching experience must:

- Work cooperatively with mentors and building administrators to identify areas where support and assistance are appropriate.

- Complete the assigned Beginner Teacher support program

To be a mentor, an educator must:

- Hold a Professional Educator License.
- Have at least three years of teaching experience.
- Demonstrate knowledge of the NC Standards for Teacher Development and Licensure and have the ability to convey knowledge of the standards to colleagues. The Beginner Teacher mentoring program will be aligned with the NC DPI Mentoring Standards.

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.*

The core components of the professional development plan are centered around communication. The school develops a culture of open communication and encourages all teachers to express their views, engage in discussions and respect different views. Then, the school introduces lesson observation to encourage peer learning and to assist teachers in identifying their potential and areas for improvement in order to raise their professional teaching standard/skills, to provide guidance, coaching and training to teachers having difficulties in their performance. All professional development plan activities include Self-appraisals and observations. Self evaluations of ones own teaching performance and reflection of ones work is crucial in each teacher's ongoing professional development. After the appraiser conducts the Lesson observation, the appraiser and appraisee meet to discuss the lesson observation effectiveness. A portfolio can also be submitted to the appraiser to review a collection of documents that support the teacher's effectiveness and areas of strength. Lastly, the professional development plan provides coaching and support, access to consistent and

reliable feedback on performance as well as time for self-reflection and ongoing professional development activities on site, online and off site at seminars/workshops.

- 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.*

At Achieving Excellence Academy of Charlotte, preparing teachers at the beginning of the year to teach core reading, Writing, Math, technology integration, differentiating instruction, Positive Behavioral Intervention & Support, Cultural diversity, data collection & analysis are crucial in increasing student learning. This program-specific professional development fully prepares teachers to use their classroom materials at beginning of the year. We will provide at minimum four days of program-specific training on the use of the core reading program, followed by additional training on any supplemental or intervention programs. Teachers will also attend professional development in administering assessments and implementing core, supplemental, and intervention programs consistently and with fidelity. Teacher Induction

program provides support and development for new teachers and leads them into lifelong advanced studies that focus on student learning. There are professional development activities that include being assigned a mentor, coach and on & off site trainings. At Achieving Excellence Academy of Charlotte, student learning is the main focus of what we do. It's the reason behind why we do what we do.

- 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.*

Those who hold the Professional teacher certification are required to complete up to 200 hours of professional development per year. The design of professional development is the result of Achieving Excellence Academy of Charlotte schools comprehensive education plan and the teachers own professional development plan (PDP) which supports the planning process. The planning process includes, at a minimum, a collection

of needs assessment data, i.e. student and teaching staff needs; root cause identification;

proposed activities; identification of resources; and proposed evaluation of the impact of planned

activities/approaches. Enhanced teaching and learning is the foundation upon which individuals

and districts should plan the content of all professional development. The professional development planning process is dynamic, reflecting teaching staff and student performance benchmarks of increasing rigor as skill levels are attained. Professional development results in a demonstrated increase in teaching staff

knowledge and understanding, teaching staff skillfulness, and teaching staff professional values. Professional development activities/experiences are assessed on an on-going and continuous basis for intended impact. Defensible evaluation tools/methods must be used to determine modifications to planned activities/experiences. Professional development enables the teaching staff to deepen their knowledge base and remain current in their content area and instructional strategies. Teaching staff learning opportunities are clearly

constructed, based on effective aching research, and involve educators in the design and implementation of such opportunities. Professional development days account for up to 70 hours of professional development allocated for the year. Methods of Professional development at Achieving Excellence Academy of Charlotte are the following: Attending professional teacher conferences, Attending educational workshops, attending professional development online through independent and through professional development through web-conferencing, instructional facilitators trainings, visiting other schools/mentors, through onsite or offsite professional trainers and lastly through joining teacher book clubs and associations. On Professional Development designated days, staff would attend professional development activities. Professional development will also be offered during the summer months when the school is closed to provide teachers with more opportunities to attend professional development activities. However, on days where professional development activities do not fall on the days that are designated for professional development, the staffing structure would entail having instructional facilitators and substitute teachers cover specific classes to support staff to attend professional development activities.

### **Enrollment and Marketing:**

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

### **Marketing Plan**

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

This school will utilize the marketing plan to provide continuous marketing throughout the years that encompass digital, face to face and traditional print marketing. Ribbon-cutting campaign: Hold a ceremony at our new school and invite major stakeholders to include: the Mayor of Charlotte, city officials, local leaders, board members, banks, families, local tv news media, newspaper reporters, educational leaders, and others. Hold a small performance of music and dancing of children to start the event. Begin a coordinated web presence through the following measures: -Modifying the existing school website; developing a School Twitter account, developing a school facebook and linkedin accounts. -A welcome video to display on school website, play at open house events and at public relations events. -Place a "tell-a-friend" link on every page of the school website. This link will provide people with fields to enter their friends name, email address, a short message and their information. Their friend will then receive an automated email referencing the referral and the website link. 3 Develop and execute a school wide enrollment campaign: Create a TV ad for brand awareness; Create a mailer by zip code to target parents. Create fun day events/ school tour for parents/children; Enhance Facebook page, develop calendar and coordinate weekly posts on facebook and twitter. 4. Utilize consistent key messages for all school communications. -Ensure that all documents have the schools logo and message that is in alignment with the

schools mission. 5. Parent Ambassador program: Recruit a team of parents to help you in your enrollment effort by: Presenting tours of campus Mentoring a new family throughout their first school year Calling and/or writing personal notes to parents and welcoming them to your school. Welcome Wednesdays: Send home fliers to parents to stop by school for refreshments and tour of school. 6. Marketing Giveaways : Give away items that have our school name and logo on it: T-shirts, coffee mugs, car magnets/bumper stickers, book bags, pens. Towels, hoodies, jackets etc. 7. Word or Mouth: face to face conversations about the school everywhere that we go. Development of an elevator speech to share with staff to learn, practice and use in conversations with the public to promote our school. Encourage staff to promote the good work of this school. Create a newsletter that reflects all areas of the school. Ask new parents to create and share a post on facebook, twitter and instagram stating: "I just enrolled my child at Achieving Excellence Academy of Charlotte Charter School for the 2020 school year. T! Check out their website at (school web address) to discover why more families like ours are choosing this school!" or "Selecting a school is one of the most important decisions that you will ever make. Ask me why I enrolled my children at Achieving Excellence Academy of Charlotte Charter School. 8. Signage: Develop welcoming signs to post throughout the school. Signs will have pictures of students engaging in educational activities; teachers instructing students in various subjects/grade levels; school administration and staff pictures reflecting their love for our students and support of our school. 9. Youtube: Produce short video vignettes to provide real life testimonials about AEA school that can be uploaded to YouTube, the school website and/or Vimeo. 10. Reviews: Ask parents, staff and stakeholders to leave positive reviews on the following sites, School Digger.com , Google+ , Yelp and Great Schools.org, carolinahub.com, movoto.com & publicschoolreview.com. 11. Branding: Work with branding company to rebrand itself in a manner that attracts and increases student enrollment and funding opportunities. 12. Canvassing the neighborhood: School administration, teachers and board members will canvass the neighborhood, walking door to door to each home and or apartment in the West Charlotte area. 13. Send personalized email campaign 4x per year.

## **Parent and Community Involvement**

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

Achieving Excellence Academy of Charlotte Charter School considers parents to be essential partners in education, which is crucial to the academic success of our students. Our school provides many ways for parents to be involved in our school, for example, volunteering countless hours toward recruitment, community outreach and school development before the school is even open. After the school opens, families are invited to participate in regular school events, book fairs, parent night open house, including education workshops and community-building activities. In addition, school faculty will communicate frequently with parents about their child's progress and will encourage parents to become a regular presence at school by attending performances, volunteering in the classroom, PTA, Leadership team,

Board and or participating in weekend school beautification & recruitment efforts. Ongoing efforts will also include pairing new parents with parents who have already been in our school for more than a year. This level of support truly enables new parents to feel welcomed and feel a part of our school. To maximize the opportunity to keep parents engaged, our school administrators will schedule parent conferences and community activities during non-work hours. Furthermore, our faculty will encourage community building partnerships, mentoring and talent development of our students. Community-building objectives are enhanced through service learning and community partnerships. Service learning ties community projects to the academic curriculum with clearly stated learning objectives linked to state standards. It also involves a period of reflection and analysis for students to discuss and share the lessons and experiences they've gained through their community work. Lastly, we will solicit communication from parents and other community stakeholders through quarterly surveys, correspondence, email, phone and face to face interactions to ensure that all feedback and suggestions from our stakeholders are collected, reviewed and analyzed as credible data to support ongoing school wide improvements

## **Admissions Policy**

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

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

Achieving Excellence Academy of Charlotte Charter Schools admission policy is nonsectarian and does not discriminate against any student. As part of the application process Achieving Excellence Academy of Charlotte requests that parents/guardians of new students participate in a half-hour information session with the Head of School or designated delegate, to discuss the educational goals of school to help parents make an informed choice for their child. Attendance at an information session is mandatory and translators will be provided. The application period is from January 1st- April 1st. All applications will be due by 11:59pm on April 1st each year. Any applications submitted after the April 1st deadline will be considered wait list applications and automatically added to the end of the waitlist. Applications can be submitted via the link on the school website and or completion of a paper application. In the event that the number of applicants in any given year, in any grade level exceeds the number of spots available, a random selection lottery will be conducted within two weeks of the April 1st deadline. All applicants and parents will be notified of the lottery, its procedures, and the notification timeline for selected and non selected students at least one week before the lottery. During the lottery process, all completed applications submitted during the enrollment period will be publicly drawn in random order until all applications have been

drawn. Each application will be recorded and numbered in the order in which it was drawn and assigned to a specific grade and preference category. Admission preferences: 1. First preference (after the first year) will be given to returning students provided the appropriate grade level is available. 2. Second preference will be given to siblings of students already enrolled in the charter school. 3. Third Preference is for employees children who apply to the school up to 15% of the total school population. 4. Fourth preference is for all students residing within Charlotte, North Carolina. 5. Fifth preference is for all students residing outside of the Charlotte, Mecklenburg County area. Students who are selected during the lottery will be notified within 2 business days of the lottery of their acceptance. The family will have 1 week from the date of first contact to enroll their student. If reasonable and multiple attempts to contact the students parents/guardians are unsuccessful, then the school will assume the student does not wish to enroll and will move to offer students spots off the waitlist. All admitted students will receive an Enrollment Form, which includes a list of required documents. At this time, families will be required to submit verification documentation for all preferences indicated on their application. The Enrollment Form must be returned to the School by the specified date or the child(ren) will forfeit enrollment for that school year. Admitted applicants will be required to provide the following original documents upon enrollment: 1. Students birth certificate 2. Parent/Guardians drivers license 3. Two Proofs of childs residence. 3.a Utility Bill/Lease/Mortgage or Payroll Documentation 4. Report card Students who are not selected during the lottery will be placed on a waiting list. If spots become available before or during the year, students/parents on the waiting list will be called and offered a spot. Parents that wish to withdraw a current student must notify Achieving Excellence Academy of Charlotte school administration in writing at least 5 days prior to withdrawal & completion of a withdrawal survey for data collection purposes. Upon receiving the completed survey, the school will submit the relevant school records to the students new school. At any time the student is able to reapply for admissions to Achieving Excellence Academy of Charlotte by following the admissions process.

### **Weighted Lottery**

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

Yes:

No: x

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S.*

*115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).*

- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

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

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

**PROJECTED ENROLLMENT**

**Year 1 through Year 5**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools

LEA #2 Gaston County Schools

LEA #3 Iredell-Statesville Schools

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

	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA 600	LEA 360	LEA 490	LEA 600	LEA 360	LEA 490	LEA 600	LEA 360	LEA 490	LEA 600	LEA 360	LEA 490	LEA 600	LEA 360	LEA 490
Kindergarten	57	2	1	57	2	1	58	1	1	58	1	1	62	2	1
Grade 01	57	2	1	57	2	1	58	1	1	58	1	1	62	2	1
Grade 02	57	2	1	57	2	1	58	1	1	58	1	1	62	2	1
Grade 03	57	2	1	57	2	1	58	1	1	58	1	1	62	2	1
Grade 04	57	2	1	57	2	1	58	1	1	58	1	1	62	2	1
Grade 05	0	0	0	57	2	1	58	1	1	58	1	1	62	2	1
Grade 06	0	0	0	0	0	0	58	1	1	58	1	1	62	2	1
Grade 07	0	0	0	0	0	0	0	0	0	58	1	1	62	2	1
Grade 08	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	285	10	5	342	12	6	406	7	7	464	8	8	496	16	8
	300			360			420			480			520		

<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Not currently in place!	Stephen Gay	Tax-Exempt S
The team lacks the requisite skill set to effectively hold the CMO accountable for measurable student outcomes. While complete the Governance section did not align with the other parts of the application. The CMO selection process and rationale for selecting Charters USA is not compelling.	Tracy Kelley	Certify Gove
Concerned about relationship with CSUSA: As noted - strong plan in place to meet the needs of your student population, but will CSUSA allow you to go outside of their normal operating procedures?	Stephen Gay	Certify Gove
<p>Is part of the organizational chart cut off in the Appendix?</p> <p>Why are the financial secretary and office assistant reporting to the custodial/transportation staff?</p> <p>Board should ensure it has the expertise necessary to successfully oversee the various aspects of school operations.</p> <p>Bylaws state the board can have 4-18 members. Has the Board considered any drawbacks to having a board as small as four or as large as 18? Should this number be amended? This also doesn't match what is in the governance narrative (which lists 5-8 members).</p> <p>Board should ensure they're meeting the minimum number of times required by SBE policy.</p> <p>Bylaws state that board members who miss 3 consecutive meetings "may" be removed; are there any other attendance stipulations around board membership?</p>	Danielle Allen	Governance a
<p>The organizational chart seems inconsistent. Does the school really intend for the school attorney, PTA, and auditing firm to exist on a step between the Board and the Executive Director? Why does the Technology Coordinator report to the Behavioral Management Team and the Financial Secretary report to the Custodial Staff? How does Charter School USA fit into this chart?</p> <p>The mission statement in the application and in the bylaws are not the same. Why not? Which is the actual mission statement?</p> <p>The Board would benefit from legal experience and/or financial experience. If Ms. Carrington is compensated as the Executive Director, she may not be a voting member of the Board. Is there a plan to address this?</p> <p>Is the Board planning to meet the number of times required by law instead of the five times proposed in the application?</p> <p>How will the school evaluate Charter School USA should they enter into a contract? Determining this prior to signing the contract seems important.</p>	Lisa Huddleston	Governance a
Strong board with a clear understanding of the needs of the projected student population.	Stephen Gay	Governance a
Who on the proposed governing board has the level of expertise in education and administration to enable the board to understand, analyze and interpret student achievement data? What strategies will the proposed Board use to recruit members with the requisite skills, talents abilities, especially as it relates to finance, school administration, accounting, law, and real estate.	Tracy Kelley	Governance a
How will the proposed CMO further the schools mission? Does the CMO have other schools in the state that serve similar student populations (SWD, ED< ELL) if so how effective have they been in maintaining high levels of student achievement? Does the CMO have experience operating a STEM focused school in North Carolina? If so, what are the achievement levels at that school? Why hasn't the team entered into a	Tracy Kelley	Proposed Man

formal relationship with the CMO, yet?		
There is not enough information about the proposed arrangement with Charter School USA. What are the specifics of the lowest achieving schools working with this organization?  Before entering into a contract with Charter School USA, the applicant should determine how to evaluate the relationship. What are the criteria that would be used to evaluate the management organization?	Lisa Huddleston	Proposed Man
The strong educational plan that is provided does not normally match CSUSA model - will they allow you the independence to develop the plan you wish to implement?	Stephen Gay	Proposed Man
School is no longer planning to partner with CSUSA.	Danielle Allen	Proposed Man
Strong plan - salaries are competitive	Stephen Gay	Staffing Pla
Staffing plan does not appear to match budget.  Again, because the target student population is not clearly defined, it's difficult to tell whether the staffing plan is adequate or not. If the school intends to target economically disadvantaged students w/ disabilities, limited English proficiency, and intellectual disabilities, the board may want to reconsider (increase) the number of EC teachers/supports/training they plan to provide.  Grievance policy for employees should outline the steps employees are to take to voice concerns or issues. What should employees do if they need to file a grievance unrelated to termination proceedings?  What qualifications will the office assistant need to have, if he/she will be responsible for PowerSchool as well as manning the front desk?	Danielle Allen	Staffing Pla
200 hours of professional development equates to five full weeks of work. The school has up to 70 hours scheduled in the calendar. Is the school concerned with teachers accomplishing an additional 130 hours in a year while also offering quality instruction to students?	Lisa Huddleston	Staff Evalua
Applicant has budgeted \$15K for staff PD and is requiring each teacher to complete "up to 200 hours" of development. First, what is the minimum number of PD hours each teacher will be expected to complete? "Up to 200" is unclear. How did the applicant arrive at \$15K for PD for the entire staff?	Danielle Allen	Staff Evalua
How will staff be trained to integrate STEAM?	Tracy Kelley	Staff Evalua
Meets standards	Stephen Gay	Staff Evalua
How does the board plan to implement this marketing plan with only \$5,000 set aside in the budget for marketing? Can the board provide additional information (quotes, estimates, etc.) for the cost of each part of this plan?	Danielle Allen	Marketing Pl
Remember cost of SWAG -  Good general plan	Stephen Gay	Marketing Pl
Community connections are a key	Stephen Gay	Parent and C
What will happen if a parent who has not attended a session submits an application for their child? Will they be allowed to enter the lottery?  Geographic preference is not allowed for charter school admission lotteries, unless they are municipal charters. Board should ensure that their enrollment and admissions process is in accordance with NC charter statute.	Danielle Allen	Admissions P
Will non attendance at the information session prevent a student from entering into the lottery? If so, explain how that requirement comports with the NC state education law?	Tracy Kelley	Admissions P
If parents do not attend the requested information sessions, will this have an impact on the child's application?	Lisa Huddleston	Admissions P
Is there a contingency plan in terms of staffing and budgeting if these enrollments are not met?	Lisa Huddleston	Projected St
Iredell - will a student travel to West Charlotte from Iredell CO	Stephen Gay	Projected St
This is the first mention of recruiting students from Gaston and Iredell-Statesville counties. What evidence does the applicant have that parents living in these areas want to send their child(ren) to school in Charlotte? What percentage of those LEAs' ADM (for the specified grade levels) does the school project they will enroll?	Danielle Allen	Projected St

How was the decision made to start with K-4th grade? What was the rationale for that decision? What potential stumbling blocks does the team foresee when it comes to enrolling students in 2nd, 3rd, and 4th grade given that they are not traditional transition points?	Tracy Kelley	Projected St
meets state requirements	Stephen Gay	Weighted Lot

Reviewer	Score
Alex Quigley	
Alan Hawkes	
Austin Smigel	Pass
Cheryl Turner	
Danielle Allen	Fail
Steven Walker	
Ginger Cash	
Heather Soja	
Joe Maimone	
Tracy Kelley	Pass
Lisa Huddleston	Pass
Lynn Kroeger	
Stephen Gay	Pass
Stephenie Clark	

## **V. OPERATIONS**

### **Transportation Plan:**

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

Achieving Excellence Academy of Charlotte Charter School views transportation as a crucial part in supporting students academic success. In order for students to be eligible for school transportation the parent/guardian must complete a transportation request google form that is linked to the school website. Or complete the transportation request form paper copy and submit it to the school office before April 1st. Transportation services will be provided through a partnership with Eagle Bus Service to provide convenient cluster meeting points throughout Charlotte,NC. Upon review of the completed transportation request form, the school will work with Eagle Bus company to create cluster transportation meeting locations on intersections throughout Charlotte, North Carolina. Cluster transportation meeting locations minimize the time students spend on the bus and provides consistent pick up and drop off times that parents/guardians and students value. In addition to partnering with Eagle Bus company, Achieving Excellence Academy of Charlotte Charter School will also work with the PTA and the School Board to coordinate a car pool program designed to address the needs of families that reside just beyond walking distance of the school. Not only will this support students to arrive to school and home safely, but will also support families to develop a support system that they may have not had before and perhaps a friendship that may last a lifetime. Through utilizing this transportation plan, transportation will no longer be a hindrance to the students that Achieving Excellence Academy of Charlotte Charter School will serve.

### **School Lunch Plan:**

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

Achieving Excellence Academy of Charlotte is committed to providing students quality, healthy meals. All students must submit a Free and Reduced Priced Meals Application. Once the application is processed, the students fee for Breakfast and Lunch will be determined. Due to the target student population, there will be a high percentage of students that qualify for Free or reduced meals. Students that are required to pay for their meals (reduced rate or full rate), will be required to have their parents/guardians pay for their meals in advance via check or money order payable to Achieving Excellence Academy of Charlotte. Students are also able to pay for meals using cash but the schools preference is payments made by check or money order. For Breakfast, students will receive a quick healthy meal that can be eaten within their classroom. For Lunch, students will eat a healthy meal in the school cafeteria/auditorium where they can select items from each of the following five meal components: 1) meat/meat alternate, 2) grain, 3) vegetable, 4) fruit and 5) milk. Students must take an item from at least

three of the five groups to make a complete school lunch, one of which must be a fruit or vegetable. All meals provided by Achieving Excellence Academy of Charlotte is based on the USDA and the Dietary Guidelines for Americans, which assure breakfast meets one-fourth and lunch meets one-third of the daily recommended intake of calories, fat, proteins, vitamins and minerals for all students. By doing so, our school is ensuring that our students are eating healthy, nutritious meals to further support student development and academic success.

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

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$10,000.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$20,000.00
Property Insurance	\$0		\$40,000.00
Motor Vehicle Liability	\$1,000,000		\$300.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$400.00
Other	\$1,000,000		\$10,000.00
Total Cost			\$80,700.00

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

**Health and Safety Requirements:**

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

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

jcarrington 09/15/2018

(Board Chair Signature)

(Date)

**Facility:**

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

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

Achieving Excellence Academy of Charlotte is partnering with Highmark School Charter Development company to design, build and locate and finance a building that is suitable for our school to purchase or lease below market value. According to Highmarks website, "Highmark School Development is the nations leading end-to-end facility developer for new and existing charter schools and for independent, private schools. Highmark provides 100% of the capital and services required to develop new buildings on raw land or to convert existing structures into safe, code-compliant, permanent, affordable school facilities." Highmark will identify a minimum of 12 properties that will meet the needs of our school. The School board and school leadership will work together with Highmark Staff to determine the best possible site for our school to meet the needs of our community. Once a site has been chosen, the contract will be signed prior to June 2019 and renovations will begin. After renovations are completed, the Certificate of Occupancy will then be submitted to charter school authorizers and a series of open houses/tours will take place, along with other community marketing efforts.

*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.*

At this time a site has not been determined, however, we are looking for at minimum 100 s.f. per student. For construction costs ranging from \$150-\$250 per s.f. (ie, the 100 s.f./student), the amount of square feet required per student is \$30,000.

**Facility Contingency Plan:** *Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.*

The facility contingency plan for Achieving Excellence Academy of Charlotte part of an ongoing process the board will develop a facilities committee that will work with Highmark School Development company to identify three to five contingency locations in and around the Charlotte community. The facility must be around 20,000 to 30,000 square feet to accommodate the 500 students anticipated in year 5. First preference will be given to a building that was formerly a department store, large grocery store or YMCA/Community center building that is no longer in use. We may use one room as a gymcafetorium, to reserve save space for classrooms. Before a final contingency location is determined we evaluate each site until the

appropriate site is located.

X

Achieving Excellence Academy of Charlotte - The mission statement is as follows: To inspire, protect and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
The Highmark relationship with this board and their relationship with Charters USA is concerning given the lack of real estate and legal expertise on the governing board.	Tracy Kelley	Certify Oper
How will you provide transportation to students who have it outlined as a related service on their IEP?	Ginger Cash	Transportati
If the transportation form must be completed by April 1, what will happen to students who enroll or move after that date?	Lisa Huddleston	Transportati
There is money in the budget for the transportation contract. Beginning in year two, there is money allocated for a bus as well, but nothing allocated for maintenance or gas. Does the school intend to purchase buses?		
The year 2 budget allows for a bus contract and a bus, why is that needed?	Tracy Kelley	Transportati
Beginning plan will meet needs of population	Stephen Gay	Transportati
What percentage of students does the school anticipate will require transportation services? Does the \$12K outlined in the budget for year 1 cover that expense?	Danielle Allen	Transportati
The child nutrition budget for year one is \$20,000. If this number is divided by the 180 school days, the applicant has allotted about \$111 per day to pay for a food program for the entire school. How will the applicant fund a breakfast and lunch program in a school targeted at economically disadvantaged students on this amount?	Lisa Huddleston	School Lunch
Does not truly address the free and reduced -	Stephen Gay	School Lunch
What percentage of students does the school anticipate will require breakfast/lunch services? The applicant states there will be a "high" percentage- will \$20K cover breakfast and lunch for all of these students for an entire year?	Danielle Allen	School Lunch
\$80K+ seems high for a yearly insurance premium for this proposed school. This doesn't match what's outlined in the budget, nor does it match what's outlined in the quote provided. Where did this \$80K figure come from?	Danielle Allen	Civil Liabil
meets standard	Stephen Gay	Civil Liabil
The expenditure in the budget for insurance is \$18,000, yet this quote is over \$80,000. Where is this const reflected in the budget?	Lisa Huddleston	Civil Liabil
EMO - CSUSA and building by Highmark - so not using CSUSA construction wing?	Stephen Gay	Facility and
What role will Charters USA play in securing, building, and financing the new school? Is there a connection between Highmark and Charters USA? If so, what is that relationship? The facilities plan does not allow for labs space, why is that given the STEAM focus?	Tracy Kelley	Facility and
Is it realistic to find 12 properties to meet the specific needs of the school within the target area?	Lisa Huddleston	Facility and
What does it mean that "the amount of square feet required per student is \$30,000"?		

<b>Reviewer</b>	<b>Score</b>
Steven Walker	
Danielle Allen	Pass
Cheryl Turner	
Austin Smigel	Pass
Alan Hawkes	
Alex Quigley	
Stephenie Clark	
Heather Soja	
Joe Maimone	
Tracy Kelley	Pass
Lisa Huddleston	Pass
Lynn Kroeger	
Stephen Gay	Pass
Ginger Cash	

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## VI. FINANCIAL PLAN

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

### Budget: Revenue Projections from each Year 1

<p><b>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</b></p> <p><i>Refer to the Resource Manual Finance Section for guidance on estimated funding amounts</i></p>	<p><b>State Funds:</b> Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1<sup>st</sup> month average daily membership.</p> <ul style="list-style-type: none"> <li>In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides</li> <li>In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located.</li> </ul> <p><b>Local Funds:</b> Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p><b>Federal Funds:</b> Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p><b>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</b></p>			
	<p>LEA #1 600 - Charlotte-Mecklenburg Schools</p>			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,291.06	285	\$1,507,952.10
	Local Funds	\$2,457.29	285	\$700,327.65
	Federal EC Funds	\$4,464.16	30	\$133,924.80
	<b>Totals</b>			\$2,342,204.55
	<p>LEA #2 360 - Gaston County Schools</p>			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,343.74	10	\$53,437.40
Local Funds	\$1,353.60	10	\$13,536.00	
Federal EC Funds	\$4,318.90	10	\$43,189.00	
<b>Totals</b>			\$110,162.40	
<p>LEA #3 490 - Iredell-Statesville Schools</p>				
<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>	
State Funds	\$5,331.09	5	\$26,655.45	
Local Funds	\$1,352.40	5	\$6,762.00	
Federal EC Funds	\$4,464.16	5	\$22,320.80	
<b>Totals</b>			\$55,738.25	

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
-State ADM Funds	\$1,588,045	\$1,935,074	\$2,279,775	\$2,624,476	\$2,969,177
-Local Per Pupil Funds	\$720,626	\$697,630	\$735,391	\$773,152	\$810,913
-Exceptional Children Federal Funds	\$199,435	\$205,063	\$210,691	\$216,319	\$221,947
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$2,508,105</b>	<b>\$2,837,767</b>	<b>\$3,225,857</b>	<b>\$3,613,947</b>	<b>\$4,002,037</b>

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

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	Year 1			Year 2			Year 3			Year 4			Year 5		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary									
Administrative & Support Personnel:															
Lead Administrator	1	\$80,000	\$80,000	1	\$82,472	\$82,472	1	\$84,944	\$84,944	1	\$87,416	\$87,416	1	\$90,000	\$90,000
Assistant Administrator	1	\$55,000	\$55,000	1	\$57,010	\$57,010	1	\$59,050	\$59,050	1	\$61,090	\$61,090	1	\$63,130	\$63,130
Director Of Student Support Services	1	\$43,000	\$43,000	1	\$43,650	\$43,650	1	\$44,300	\$44,300	1	\$43,950	\$43,950	1	\$45,600	\$45,600
Operations Manager	1	\$43,000	\$43,000	1	\$43,650	\$43,650	1	\$44,300	\$44,300	1	\$43,950	\$43,950	1	\$45,600	\$45,600
School Counselor	1	\$40,000	\$40,000	1	\$40,650	\$40,650	2	\$41,300	\$82,600	2	\$41,950	\$83,900	2	\$42,600	\$85,200
School Nurse	1	\$35,000	\$35,000	1	\$35,600	\$35,600	1	\$36,200	\$36,200	1	\$36,800	\$36,800	1	\$3,700	\$3,700
Hr Generalist	1	\$30,000	\$30,000	1	\$30,575	\$30,575	1	\$31,150	\$31,150	1	\$31,725	\$31,725	1	\$32,300	\$32,300
Clerical	1	\$25,000	\$25,000	2	\$25,450	\$50,900	2	\$25,900	\$51,800	2	\$26,350	\$52,700	2	\$26,750	\$53,500
Food Service Staff	1	\$20,000	\$20,000	1	\$20,450	\$20,450	2	\$20,900	\$41,800	2	\$21,350	\$42,700	2	\$21,800	\$43,600
Custodians	1.5	\$25,000	\$37,500	2	\$25,450	\$50,900	2	\$25,900	\$51,800	2	\$26,350	\$52,700	2	\$26,800	\$53,600
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
A - Total Admin and Support:	10.5		\$408,500	12		\$455,857	14		\$527,944	14		\$536,931	14		\$516,230
Instructional Personnel:															
Core Content Teacher(s)	12	\$37,000	\$444,000	15	\$38,400	\$576,000	18	\$39,800	\$716,400	21	\$41,200	\$865,200	24	\$42,600	\$1,022,400

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Electives/Specialty Teacher(s)	4	\$34,000	\$136,000	5	\$35,400	\$177,000	5	\$36,800	\$184,000	5	\$38,200	\$191,000	7	\$39,600	\$277,200
Exceptional Children Teacher(s)	2	\$38,000	\$76,000	2	\$39,400	\$78,800	3	\$40,800	\$122,400	4	\$42,200	\$168,800	4	\$43,600	\$174,400
Technology Coordinator	1	\$35,000	\$35,000	1	\$35,600	\$35,600	1	\$36,200	\$36,200	1	\$36,800	\$36,800	1	\$37,400	\$37,400
Technology Specialist	0	\$0	\$0	0	\$0	\$0	1	\$25,900	\$25,900	100	\$26,350	\$2,635,000	2	\$26,800	\$53,600
Behavioral Management Specialist	1	\$30,000	\$30,000	1	\$30,650	\$30,650	2	\$31,300	\$62,600	2	\$31,950	\$63,900	2	\$32,600	\$65,200
Learning Specialist	2	\$30,000	\$60,000	1	\$30,650	\$30,650	2	\$31,300	\$62,600	2	\$31,950	\$63,900	2	\$32,600	\$65,200
Esl Teacher	1	\$35,000	\$35,000	2	\$35,600	\$71,200	2	\$36,300	\$72,600	3	\$36,950	\$110,850	3	\$37,600	\$112,800
Executive Functioning Coach	1	\$30,000	\$30,000	1	\$30,650	\$30,650	2	\$31,300	\$62,600	1	\$31,950	\$31,950	1	\$32,600	\$32,600
Instructional Facilitator	1	\$40,000	\$40,000	1	\$40,650	\$40,650	1	\$41,300	\$41,300	2	\$41,950	\$83,900	2	\$42,600	\$85,200
Teacher Assistants	7	\$25,000	\$175,000	6	\$25,400	\$152,400	6	\$25,800	\$154,800	6	\$26,200	\$157,200	6	\$26,600	\$159,600
B - Total Instructional Personnel:	32		\$1,061,000	35		\$1,223,600	43		\$1,541,400	147		\$4,408,500	54		\$2,085,600
A+B = C - Total Admin, Support and Instructional Personnel:	42.5		\$1,469,500	47		\$1,679,457	57		\$2,069,344	161		\$4,945,431	68		\$2,601,830
Administrative & Support Benefits															
Health Insurance	10	\$3,280	\$32,800	9	\$3,290	\$29,610	9	\$3,300	\$29,700	12	\$3,310	\$39,720	14	\$3,320	\$46,480
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	10	\$750	\$7,500	9	\$775	\$6,975	9	\$790	\$7,110	12	\$810	\$9,720	14	\$840	\$11,760
Life Insurance	10	\$120	\$1,200	9	\$125	\$1,125	9	\$130	\$1,170	12	\$135	\$1,620	14	\$140	\$1,960
Disability	10	\$300	\$3,000	8	\$305	\$2,440	9	\$310	\$2,790	12	\$315	\$3,780	14	\$0	\$0
Medicare	10	\$400	\$4,000	8	\$410	\$3,280	9	\$415	\$3,735	12	\$0	\$0	14	\$430	\$6,020
Social Security	10	\$1,750	\$17,500	8	\$1,770	\$14,160	9	\$1,780	\$16,020	12	\$1,847	\$22,164	14	\$1,970	\$27,580
D - Total Admin and Support Benefits:			\$66,000			\$57,590			\$60,525			\$77,004			\$93,800
Instructional Personnel Benefits:															

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Health Insurance	45	\$3,400	\$153,000	47	\$3,400	\$159,800	49	\$3,460	\$169,540	52	\$3,860	\$200,720	54	\$4,260	\$230,040
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	45	\$750	\$33,750	47	\$770	\$36,190	49	\$790	\$38,710	52	\$810	\$42,120	54	\$830	\$44,820
Social Security	45	\$2,340	\$105,300	47	\$2,429	\$114,163	49	\$2,518	\$123,382	52	\$2,607	\$135,564	54	\$2,696	\$145,584
Disability	45	\$360	\$16,200	47	\$370	\$17,390	49	\$380	\$18,620	52	\$390	\$20,280	54	\$400	\$21,600
Medicare	45	\$550	\$24,750	47	\$566	\$26,602	49	\$582	\$28,518	52	\$595	\$30,940	54	\$610	\$32,940
Life Insurance	45	\$130	\$5,850	47	\$135	\$6,345	49	\$140	\$6,860	52	\$145	\$7,540	54	\$150	\$8,100
E - Total Instructional Personnel Benefits:			\$338,850			\$360,490			\$385,630			\$437,164			\$483,084
D+E = F - Total Personnel Benefits			\$404,850			\$418,080			\$446,155			\$514,168			\$576,884
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10.5		\$474,500	12		\$513,447	14		\$588,469	14		\$613,935	14		\$610,030
B+E = H - Total Instructional Personnel (Salary & Benefits)	32		\$1,399,850	35		\$1,584,090	43		\$1,927,030	147		\$4,845,664	54		\$2,568,684
G+H = J - TOTAL PERSONNEL	42.5		\$1,874,350	47		\$2,097,537	57		\$2,515,499	161		\$5,459,599	68		\$3,178,714

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
	Administrative & Support:					
Office:	Office Supplies	\$6,000	\$6,000	\$6,000	\$7,000	\$1,000
	Paper	\$2,000	\$2,000	\$2,000	\$3,000	\$4,000
	Computers & Software	\$25,000	\$5,000	\$5,000	\$5,000	\$5,000
	Communications & Telephone	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	Copier leases	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$10,000	\$5,000	\$5,000	\$5,000	\$5,000
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$18,000	\$20,000	\$22,000	\$23,000	\$25,000
	Other Professional	\$40,000	\$50,000	\$60,000	\$65,000	\$70,000
Facilities	Facility Lease/Mortgage	\$80,000	\$80,000	\$80,000	\$80,000	\$80,000
	Maintenance	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Custodial Supplies	\$8,000	\$8,000	\$8,000	\$8,000	\$10,000
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$18,000	\$20,675	\$22,000	\$24,675	\$26,000
	Other	\$0	\$0	\$0	\$0	\$0
Utilities	Electric	\$15,000	\$16,000	\$17,000	\$20,865	\$30,000
	Gas	\$4,000	\$5,000	\$6,000	\$8,000	\$15,000
	Water/Sewer	\$10,000	\$12,000	\$14,000	\$15,000	\$17,000
	Trash	\$2,500	\$2,575	\$2,686	\$2,800	\$3,900
Transportation	Buses	\$0	\$49,000	\$49,000	\$49,000	\$49,000
	Gas	\$0	\$0	\$0	\$0	\$0
	Bus Transportation Contract	\$12,000	\$12,000	\$12,000	\$12,000	\$12,000
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$5,000	\$4,000	\$4,000	\$4,000	\$4,000
	Child nutrition	\$20,000	\$25,000	\$30,000	\$35,000	\$40,000
	Travel	\$5,000	\$5,000	\$5,000	\$6,000	\$6,000
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$297,500	\$344,250	\$366,686	\$390,340	\$419,900
	Instructional:					

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

Achieving Excellence Academy of Charlotte - The mission statement is as follows: To inspire, support and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

Instructional Contract	Staff Development	\$15,000	\$20,000	\$25,000	\$30,000	\$35,000
Classroom Technology	Software	\$30,000	\$35,000	\$40,000	\$45,000	\$50,000
Books and Supplies	Instructional Materials	\$25,000	\$30,000	\$34,000	\$40,000	\$60,000
	Curriculum/Texts	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Copy Paper	\$10,000	\$12,000	\$14,000	\$16,000	\$18,000
	Testing Supplies	\$200	\$500	\$1,000	\$1,200	\$1,500
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$90,200	\$107,500	\$124,000	\$142,200	\$174,500
	K+L = M - TOTAL OPERATIONS	\$387,700	\$451,750	\$490,686	\$532,540	\$594,400

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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
J - TOTAL PERSONNEL	\$1,874,350	\$2,097,537	\$2,515,499	\$5,459,599	\$3,178,714
M - TOTAL OPERATIONS	\$387,700	\$451,750	\$490,686	\$532,540	\$594,400
J+ M =N TOTAL EXPENDITURES	\$2,262,050	\$2,549,287	\$3,006,185	\$5,992,139	\$3,773,114
Z - TOTAL REVENUE	\$2,508,105	\$2,837,767	\$3,225,857	\$3,613,947	\$4,002,037
Z - N = SURPLUS / (DEFICIT)	\$246,055	\$288,480	\$219,672	-\$2,378,192	\$228,923

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

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

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

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

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

Being that Achieving Excellence Academy of Charlotte is the only school in North Carolina that specializes in providing a rigorous curriculum and support to unlock the potential in students with learning difficulties and limited language proficiency and others, there is an abundance of parents that want their children to attend this school. For one year, school administration, board members and parents have collected data through multiple measures. For instance, data was collected from face to face interactions with residents, review of completed written surveys and web based electronic surveys, positive Facebook and twitter interactions with parents and teachers and through informal meetings with parents at Freedom Park, Tuckaseegee Park and local church events where school administration were able to capture crucial data that reflects support for our school by the community as a whole. Upon reviewing this data it was determined that the first year that this school is open the enrollment projection is 300 students. The school will grow by one grade level (60 students) per year. In order to break even this school needs to enroll a minimum of 275 students. Due to the growing need in the West Charlotte area for the educational services and specialized instruction that this school will provide, we will surpass the break even point and will maintain a student enrollment waiting list when our enrollment numbers exceed 300 students.

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

The contingency plan is as follows: 1. School administration will review the financials to determine the staff reductions needed then develop a plan to restructure the school in a manner where the focus will remain on what is best for our students. 2. For the Upper Elementary & Middle School grade levels, Teachers that are dual certified will be expected to teach two courses per school year. For instance, an English Teacher may teach English for one half of the year and then switch to teach Social Studies for the remainder of the year. 3. School Administration will serve dual roles, such as clerical duties, classroom teacher etc. 4. The employee benefit package will be greatly reduced & or removed all together, in order to utilize those funds to cover operational expenses. 5. School Administration will take a

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reduction in salary for 2 years to help offset operational expenses.6.We will secure donations for school supplies through donorschose, classroom central as well as fundraising activities.

*Does the budget rely on sources of funds other than state, county, and federal (e.g. loans, donations etc.? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices*

Achieving Excellence Academy of Charlotte's operational budget is primarily based on federal, state and county, funding. The operational budget does not rely on other sources of funding, however school administration will be actively pursuing grants from local community foundations , financing from Charter School USA to support purchasing of school equipment etc.. and possible revenue from offering before and after school enrichment programs.

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

18 -1(teacher) -1(specialists-co-teaching)

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

Yes, Achieving Excellence Academy of Charlotte, will contract with financial accounting services, school bus transportation, Occupational, Speech and Physical therapists and professional development trainers. For all contracted services, written quotes will be obtained by school administration and shared with the board of directors.

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

Achieving Excellence Academy of Charlotte is committed to the school's mission of supporting economically disadvantaged students with learning difficulties, limited English proficiency & intellectual disabilities to support student growth, enhance student performance and unlock each students full potential. The budget is in direct alignment with the mission of the school. Specific instructional and support resources are allocated to support student learning. For instance, funding is allocated for instructional support resources such as learning specialists, executive functioning coaches, Exceptional Children teachers , classroom teachers, Technology Coordinator and teaching assistants. Being that for a majority of our students transportation to and from school is a barrier to their education. To support our students, this school will contract with Eagle Bus transportation to provide school bus transportation (cluster stops) for students that reside within the proximity of the school but have no other means to get to school and home each day. In addition, this school will provide a full time Nurse and a full time School Counselor whom will not only provide students with the counseling services & or medical support but will also support the family as a whole by connecting family members to appropriate community resources to further strengthen and support the family unit. Lastly this budget includes instructional resources, software, technology and professional development for teachers to be on the leading edge of technology integration and instructional strategies to support low income students with learning difficulties to have the tools

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

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

Achieving Excellence Academy of Charlotte's goal is to maintain an unrestricted fund balance within the general fund, that is no less than 10 percent of regular general fund or two months operating expenses. The operational budget is primarily based on the projected state, county, and federal funds and does not rely on other sources of funds to operate the school. However, school administration will actively seek grants opportunities from local community foundations and or financing from Charter School USA, to support purchasing of school equipment and other operating expenses. The number of students who attend this school is critical to the school revenues because most of this funding is provided on a per-pupil basis which is adjusted for actual student attendance and changes in staff salaries. When the school revenue exceed expenses in a given year, this excess will be carried over to the next fiscal year to be available for any school related purpose. However, if there is ever a shortage of funds in the General Fund, the school may choose to temporarily borrow funds from the reserve funds on a short-term basis. The fund balance at this school is created when the fund revenues exceed fund expenditures for a fiscal period. Basically, the difference between the fund's assets and liabilities equals the fund balance. Therefore, through the continued building of the general fund balance which will be accomplished by budgeting conservatively for revenues, as well as actively engaging in ongoing marketing efforts to increase student enrollment, this school general fund will be fiscally sound.

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

The School will work with Highmark School Development to locate a suitable, existing structure within West Charlotte to have remodeled to meet school zoning codes. However, if there isn't an existing structure available for remodeling, Highmark School Development will build a school that meets all building and zoning codes. Once the school is operational, Highmark will lease the facility to the school at a proposed rate of 10- 15% of the school revenue as they have done for many other charter schools throughout the United States. In addition, Charter School USA may approve a loans at a 6% interest rate to be used to purchase technology infrastructure, furniture, computers, materials etc..

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

This school will not have any other assets from other sources.

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**Financial Compliance:** (No more than a half of a page)

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

Achieving Excellence Academy of Charlotte will contract with Charter School USA to provide financial management reporting system, along with policies and procedures to support the day to day financial operations of the school. To be clear, Achieving Excellence Academy of Charlotte has not contracted with Charter School USA for the development of any part of this charter application, however will contract with Charter School USA for the financial management reporting system and support that they provide charter schools which includes: payroll system, DPI data collection and reporting, budgeting and other pertinent financial reporting. Charter School USA will work closely with our Executive Director, School Leader, Operations Manager and Board of Directors to ensure that our financial plan is fiscally sound. In addition to Charter School USA financial reporting system and procedures, the school will retain an experienced Charter School certified Public Accountant, Mr. Darrell Keller to conduct independent financial audits and reviews to ensure the financial strength and stability of our school.

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

There are no related party transactions.

*Provide the name and contact information of the independent audit firm who will conduct the annual financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.*

Darrell L. Keller, CPA, PA  
CERTIFIED PUBLIC ACCOUNTANT  
PO BOX 1028  
KINGS MOUNTAIN, NC, 28086  
Office phone: (704) 739- 0771  
Fax number: (704) 739-6122

Achieving Excellence Academy of Charlotte Charter School will be located on the west side of Charlotte, North Carolina within Mecklenburg county. According to the U.S. Census Bureau data (2017), its evident that there are clear disparities in income and education levels across the major ethnic groups within the neighborhood of the proposed charter school. According the the U.S. Census bureau data (2017). 63.7% of the children residing on the westside of Charlotte are below the federal poverty line. In fact, this neighborhood has a higher rate of childhood poverty than 96.9% of U.S. neighborhoods. Furthermore, according to The Neighborhood Scout's research (2018), there are a number of people of African ancestry (28%), Hispanic ancestry (14%), Asian ancestry ( 5.3%) and Yugoslav ancestry (2.9%). Parents residing in this neighborhood have expressed an overall dissatisfaction with the quality of education that their children are currently receiving through the CMS school district. Parents have expressed

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that there is a lack of a rigorous curriculum, that challenges their children, lack of a individualized or specialized curriculum to meet the learning needs of their children and a lack of mentoring community partnerships, leadership development and college prep activities available for their children. In addition, there is a high level of children within the neighborhood that this charter school will serve that require Exceptional Children Services to provide support students with disabilities to access to the general curriculum and intervention programs designed to provide maximum opportunities for instruction in the general-education setting, to provide a full continuum of services, including, occupational, physical therapy and speech related services and technology. Being that we will provide specialized, tailored instruction to meet the learning needs of all learners we will fill the educational gap that currently exists.

According to the North Carolina School Report Cards( 2016- 2017), the nearest Elementary, Middle and High schools in the proposed school location have received a "D" performance on the 2016-2017. In addition, the west charlotte CMS schools do not provide a specialized instructional curriculum needed to support students with learning difficulties & or career, college prep and leadership development that our school will provide to not only support the academic, social, and leadership development for our students but to have an immediate, positive impact on the community as a whole. Therefore it is crucial that the accelerated planning year for Achieving Excellence Academy of Charlotte Charter School be approved to increase educational options and provide specialized instruction to make a positive impact in the lives of all of our students, their families and the community that this school proposes to serve.

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
The proposal, facility, operations, and financial reporting and controls are too dependent on the CMO and the Board lacks the expertise to hold the CMO accountable. There are lingering concerns about the relationship between Highmark and USA Charters and there seems to be double-dipping in terms of the roles and responsibilities of Highmark as leaseholder and financier of equipment?	Tracy Kelley	Certify Fina
Year 4 surplus is a question mark?	Stephen Gay	Certify Fina
Will you really pull 5 from Iredell to West Charlotte?	Stephen Gay	Budget Reven
Aligns with the numbers specified in Section 1, but the LEAs are different (Section 1 did not mention Gaston or Iredell-Statesville).	Danielle Allen	Budget Reven
Exception: Error Year 4: Technology Specialist: 100.00/\$26,350/\$2,635,000 If that is adjusted it falls in line with the other years.  Check: Financial Representative	Austin Smigel	Personnel Bu
Plan early spoke of chrome books and whiteboards - may need to look at tech facilitator earlier than planned. The salary of \$37K for teachers will bring in only new teachers and that will impact your plan for all the services you wish to offer	Stephen Gay	Personnel Bu
Why is there only 1 EFC listed here, when earlier in the application, it stated there would be 2? How is one individual supposed to meet with all 300 students once a week, create individualized goals, and provide support to the EC team?  Given that the school plans to target high needs kids, does the salary allow for the recruitment and retention of highly qualified teachers?  Is \$35K for a full-time school nurse reasonable???  Number of staff under "Instructional Personnel Benefits" doesn't match the number of instructional staff outlined in the previous section.  Appears to be a clerical error in the year 4 line item for technology specialist- 100 is likely incorrect.	Danielle Allen	Personnel Bu
Technology cost appears low for supplying 300 students with chrome books. This amount would also not allow for the infrastructure to be built. Telecommunications system appears low.  Bus transportation contract appears low.  CMO arrangement alluded to but not budgeted for.  Y2-Y5 Busses but no gas, maintenance budgeted?  Instructional software appears to be high but the testing supplies appear to be low.  The initial year costs appear to be low but there would be a surplus of approximately \$250,00 in year one that would be able to be used for overages and unexpected expenses.  Based on information regarding the target school population the child nutrition budget appears to be low.	Austin Smigel	Operations B
The instructional budget seems under financed given the number of students year 1, why is that? Please provide a compelling rationale supporting the decision to allot just 10k for curriculum text for 300 students which amounts to just \$33 per student and does not increase years 2-5 even though the overall student population increase from 300 to 540 which means that by the end of the 5th year the school would have spent \$92 per student on curriculum texts, why is that?	Tracy Kelley	Operations B

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How much do you have budgeted for provision of related services such as psychological, occupational therapy, physical therapy, speech/language, etc?	Ginger Cash	Operations B
Staff development budget is low if hire new teachers and try to implement all areas of your proposed plan	Stephen Gay	Operations B
What is included in "other professional" for \$40K?  Why does the bus expense go from 0 in year 1 to \$49K in years 2-5? Should there be a bus expense in year 1? Are gas, oil, tires, and maintenance all included in the contract?  Marketing line item doesn't seem to match what's in the marketing plan.	Danielle Allen	Operations B
Is there is an error on the technology specialist line in year 4?  The child nutrition budget appears low. How will this quantity provide for the students' needs?  Where in the budget are the Chromebooks provided for?  How much will the contract with Charter Schools USA affect the budget?	Lisa Huddleston	Operations B
\$2.3 million net surplus in year 4?	Stephen Gay	Total Expend
Year four has a deficit, likely because of the clerical issue with personnel in the budget.	Danielle Allen	Total Expend
The surplus listed in the overall budget will be needed to meet some of the operational and instructional needs. How will these funds be reallocated?	Lisa Huddleston	Total Expend
There is an error in the personnel for year 4.	Austin Smigel	Total Expend
Please explain the financing terms that exist between the Board and Charter USA as the CMO as it pertains to purchasing of school "equipment etc". What specifically is meant by "equipment etc"? Please explain the rationale supporting linking the lease/mortgage payments to Highmark on school revenue?	Tracy Kelley	Budget Narra
The financial narrative states that the school will contract with Charter Schools USA, but the actual budget does not reflect this. How will the school reallocate funds if they do develop this contract? How will they meet the compliance needs if they do not?	Lisa Huddleston	Budget Narra
Again - why CSUSA for EMO and not using their building group?	Stephen Gay	Budget Narra
What internal controls will be put in place at the school level? How will the Board monitor Charter USA and how much will the CMO charge the school for financial management and reporting systems? What goals will be put in place to hold the CMO accountable and to monitor effectiveness?	Tracy Kelley	Financial Au
Since the board is no longer planning to partner with CSUSA, how will they manage financial reporting, student accounting, etc.? How will the board ensure adequate internal controls, if they're no longer relying on CSUSA to provide guidance in that area? Does anyone on the board have financial expertise?	Danielle Allen	Financial Au

Reviewer	Score
Steven Walker	
Danielle Allen	Fail
Cheryl Turner	
Austin Smigel	Fail
Alan Hawkes	
Alex Quigley	
Ginger Cash	
Stephenie Clark	
Stephen Gay	Pass
Lynn Kroeger	
Lisa Huddleston	Fail
Tracy Kelley	Fail
Joe Maimone	

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Heather Soja	
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**VII AGREEMENT PAGE**

**Application Fee:**

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

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

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

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

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

jcarrington

Date: 09/29/2018

**Applicant Signature:**

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

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

Print/Type Name: jcarrington

Board Position: Executive Director/Founder

Signature: \_\_\_\_\_

Date: 09/29/2018

Sworn to and subscribed before me this

Achieving Excellence Academy of Charlotte - The mission statement is as follows: To inspire, support and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

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

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

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

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

## **OVERALL ASSESSMENT**

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

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

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

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

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

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

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

<b><u>Initial Screening</u></b>
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Achieving Excellence Academy of Charlotte - The mission statement is as follows: To inspire, support and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

<b>Mission, Purposes, and Goals</b>	- danielle_allen
<b>Education Plan</b>	- danielle_allen
<b>Governance and Capacity</b>	- danielle_allen
<b>Operations</b>	- danielle_allen
<b>Financial Plan</b>	- danielle_allen
<b>OVERALL</b>	<p>- danielle_allen</p> <p>- stephenie_clark</p> <p>Appendix B2 was not submitted.            Section for board membership is missing answer to whether "disciplinary action was taken" for one board member.            Appendix F is missing board forms filled out and have incomplete background checks.            Appendix I is a letter, not the executed contract signed by both parties.            Appendix K is missing financial information for 2017.            Appendix N is a letter, not the actual form 990 for the last 3 years.            Appendix P is missing the complete form.</p> <p>Notes: Appendix B is missing curriculum outlines for middle school and high school grade spans. - stephenie_clark</p> <p>Appendix P is only the signed/notarized page, but is missing the rest of the form. - stephenie_clark</p>

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u>            Survey does not indicate the number of respondents in any of the sections. - austin_smigel</p> <p><u>Mission Statement</u>            Strong focus on curriculum (Great Minds) is rigorous, but identifies the need for remediation. - stephen_gay1</p> <p><u>Mission Statement</u>            Is school targeting students with learning disabilities, limited English proficiency, and intellectual disabilities? If so, perhaps that should have been included in the mission statement. - danielle_allen</p> <p><u>Educational Need and Targeted Student Population</u>            Being from an economically disadvantage community or household does not, de facto, mean that you have an intellectual disability. The same can be said for English language learners. What is meant by the statement made in description of the school's mission in which it indicates that the schools' mission is to "attain highly skilled educators and specialists to provide explicit, specialized instruction to support economically</p>
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disadvantaged students with learning difficulties, limited English proficiency & intellectual disabilities" ? Do you want to specifically target a niche sub group of students who are economically disadvantaged ELL students with disabilities? In identifying your target population what consideration was given to the disproportionality and over-representation of economically disadvantaged boys (of all ethnicities, especially boys of color) in special needs classes? How will the support outlined in the response account for this when compared to the LEA? How will the Board learn about sub-group performance, given that this is the focus of your recruitment strategy? How will leaders know they are meeting the needs of students if the leaders and Board are not looking closely at how ELL, students with disabilities, economically disadvantaged students of all races are performing? - kellelytracy1

Educational Need and Targeted Student Population

Appendix A1 does not include either survey data or public meeting information. Does that data exist?

What are the qualifications for the Executive Function Coaches? Are they teachers or counselors or a hybrid model? How many students will each EFC be responsible for?

Is the school targeting all students who are economically disadvantaged or just those who have learning difficulties, are English learners, or have intellectual disabilities? - lisa\_huddleston

Educational Need and Targeted Student Population

the focus on 60 per grade is great - small class size and developing a family base fo rtes future. - stephen\_gay1

Educational Need and Targeted Student Population

How many total survey responses were received? Total number is helpful in determining whether or not there is substantial need.

What percentage of ELL, SWD and ED students does the school anticipate they will enroll?

Staffing plan has 2 EFCs in year 1, for 300 students (but budget only has one EFC allotted). How will their time be spent such that they're able to develop individualized goals for each student? How does 45-60 minutes, once a week, help the EFC get to know students well enough to create individualized goals? - danielle\_allen

Purposes of Proposed Charter School

The purposes identified do not necessarily correlate with the proposed mission to serve at risk students. What different and innovative teaching methods will be used to specifically improve achievement levels for your target population (SWD, ED, ELL)? How would you define define or determine which students in Mecklenburg county are "at risk" and why? Beyond strategically grouping (hetero or homo) how would differentiation actually work in a typical classroom? - kellelytracy1

Purposes of Proposed Charter School

In the mission section, gifted students are not mentioned. However, this description of the purposes of the school has a major focus on gifted students with no mention of students with intellectual disabilities. How does the school plan to balance the disparate needs of students with intellectual disabilities and those who are intellectually gifted? If focusing on gifted education is a major purpose, why is it not included in the description of the

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	<p>school's mission? - lisa_huddleston</p> <p><u>Purposes of Proposed Charter School</u> Strong approach - heavy staff needs! - stephen_gay1</p> <p><u>Purposes of Proposed Charter School</u> Earlier in the application, the applicant specifically mentioned a desire to serve SWD, ELLs, and EDS students, however, these subgroups do not appear to be explicitly included in the purposes outlined here.</p> <p>Project-based learning is mentioned here but wasn't mentioned earlier, will this be used in conjunction with the STEAM focus? - danielle_allen</p> <p><u>Goals for the Proposed Charter School</u> The stated goals do include specific goals for your targeted population as stated in previous sections and mission description; how will the schools' leaders monitor the learning of students with disabilities, economically disadvantaged, and ELL and even further since there is a focus on executive functioning boys and girls? What academic goals will be used to progress monitor these sub groups and the school writ large? What is the frequency for MAP? What assessment will be used as a predictor of future success on EOY state assessments? What goals will be put in place to monitor the effectiveness of the curriculum and how will the school's achievement and growth goals be incorporated into the school leaders goals? What are the school leaders goals and how will student achievement be incorporated? - kelleytracy1</p> <p><u>Goals for the Proposed Charter School</u> For Academic Goal #1, will students show an increase of 30% proficiency in reading or will 30% of students be proficient? What will the baseline be if the goal is to show improvement?</p> <p>For the Financial Goal, the plan is to have a positive balance. Does the school plan to develop more specific goals around this balance, perhaps a dollar amount or a percentage of revenue?</p> <p>Again for Academic Goal #2, will students show a 30% improvement in math or will 30% be proficient?</p> <p>While the mission statement talks explicitly about students with disabilities and English learners, there is no mention of measuring the achievement of these groups. How will the school determine if these groups of students have been successful? - lisa_huddleston</p> <p><u>Goals for the Proposed Charter School</u> Additional detail around goals is needed. Is applicant proposing an increase of 30 percentage points in proficiency in year 1? Given the target demographic, is this a feasible goal for one year?</p> <p>"30% of students will demonstrate proficiency in Math as measured by NC EOG and MAP assessments." What is the baseline proficiency for students in your target student population? - danielle_allen</p> <p><u>Certify Mission, Plan, Goals</u> Given the specific focus articulated by the team, the goals appear to be misaligned, the</p>
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	<p>stated purposes are also misaligned, and enrollment projections are unrealistic and overly ambitious. While the group has substantial knowledge of the demographic make up of its targeted area there are significant assumptions as to the abilities of the students living in the community. These assumptions appear to evidence a deficit model approach that focuses on students' weakness rather than their strengths. For example, in discussing differentiation and grouping the team misses an opportunity to assess students' learning styles as a basis for differentiating process, product, directions etc. - kellestracy1</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u>          How will school leaders will assure the assessments created in grade level or content level PLCs are aligned to the rigor of the state standards and not just to the purchased curriculum, especially since they are teacher created? How will staff monitor the effectiveness of the math and ELA curriculum in order to know if it is meeting the needs of the targeted student population? What will grade level teams or content area teams do if students are not learning? The instructional plan does not speak to the specific instructional approaches necessary to realize the STEM (engineering, Architecture etc) program described in the mission section, why is this? - kellestracy1</p> <p><u>Instructional Program</u>          Is STEAM a delivery vehicle for core language learning, or is it an educational goal in its own right?</p> <p>Which assessment strategies will be used and when? There is not much specificity here. - lisa_huddleston</p> <p><u>Instructional Program</u>          Very ambitious and plan - really great structure and thought put in place. This will be the ideal curriculum. - stephen_gay1</p> <p><u>Instructional Program</u>          Remains unclear what the STEAM focus of the school will look like in practice. How will this focus shape every day instruction?</p> <p>What evidence does the applicant have that the selected curriculum will lead to improved outcomes for ELL, SWD, and EDS students? - danielle_allen</p> <p><u>Curriculum and Instructional Design</u>          The curriculum provided and described does not align with the STEM focus area described in mission description, why is that? - kellestracy1</p> <p><u>Curriculum and Instructional Design</u>          Appendix B does not address curriculum across various grade levels. How will this curriculum be implemented for each different grade?</p> <p>What is the plan for the high school that they expect to add?</p> <p>In the calendar, student orientation will take place before new teacher induction. How is this practical, particularly in the first year? - lisa_huddleston</p> <p><u>Curriculum and Instructional Design</u>          8th grade Science only being a half year - remember the State testing</p> <p>*Great plan to meet the advance match students! In middle school - stephen_gay1</p> <p><u>Curriculum and Instructional Design</u></p>

If school is operating on year round schedule, the academic calendar should be revisited. Most calendar months have approx 20 instructional days, but the calendar submitted by the applicant lists up to 34 instructional days in a single month. Further, the track-in and track-out dates are not clearly defined in the calendar provided by the applicant.

Applicant listed a number of primary instructional strategies but provided little guidance on how they will all work together to meet the needs of the target student population. For example, how will direct instruction work in tandem with project-based learning?

There don't appear to be any STEAM-related courses (such as engineering) in the HS graduation requirements.

Why does Appendix B2 refer to Arizona university entrance requirements? - danielle\_allen

Special Programs and "At-Risk" Students

When identifying gifted students, how will the school find tools in all languages that might be needed? While an ideal arrangement, this sounds impractical in some circumstances.

Even with flexible grouping, how will teachers manage to differentiate the curriculum with 28 students in one classroom? - lisa\_huddleston

Special Programs and "At-Risk" Students

While you have stated the roles of staff members during the Response to Intervention/Instruction process, what data will you use to determine a student is at risk? How will you determine if a student is not successful with Tier 1 supports? Tier 2 supports? Tier 3 supports? You state that at Tier 3 a student will be "referred for a comprehensive psycho-educational evaluation to determine eligibility for special education". What if someone (parent, teacher, or community member) suspects a disability prior to Tier 3 supports? NC Policies Governing Services for Children with Disabilities states that an evaluation can not be delayed while interventions/supports are implemented. What processes/procedures will you have in place to safeguard against the delay of an evaluation? - ginger\_cash

Special Programs and "At-Risk" Students

Very in-depth plan - stephen\_gay1

Exceptional Children – Identification and Records

Meets state guidelines - stephen\_gay1

Exceptional Children – Identification and Records

The Executive Function Coach is also required to meet with every child in the school for 45-60 minutes each week in order to create/review individualized goals. The budget has 1 EFC in it. How will this person's time be split in order for them to provide supports for students in the EC program? What training (if any) will the EFC receive to provide these supports? - danielle\_allen

Exceptional Children – Education Programming

How will the school implement related services programs? Will this be done through contracted personnel or direct employees? - lisa\_huddleston

Exceptional Children – Education Programming

	<p>What is your plan for providing the full continuum of services that includes regular, resource, separate, and homebound setting?</p> <p>When new students come in, what is your process/procedure for identifying students who are in need of special education services and/or accommodations? How will you obtain those records?</p> <p>You state that at Tier 3 a student will be "referred for a comprehensive psycho-educational evaluation to determine eligibility for special education". What if someone (parent, teacher, or community member) suspects a disability prior to Tier 3 supports? NC Policies Governing Services for Children with Disabilities states that an evaluation can not be delayed while interventions/supports are implemented. What processes/procedures will you have in place to safeguard against the delay of an evaluation?</p> <p>Confidentiality: When records are check out to authorized personnel, how will you ensure that the record remains secure until it is returned to the locked filing cabinet?</p> <p>What is your plan for providing related services such as psychological, speech/language, occupational therapy, physical therapy, etc? - ginger_cash</p> <p><u>Exceptional Children – Education Programming</u></p> <p>Detailed plan - stephen_gay1</p> <p><u>Student Performance Standards</u></p> <p>How will smart goals be linked to NWEA/MAP goals and how will they be used and analyzed so the staff will know how well they are implementing the curriculum and if kids are learning and if students will perform well on EOY state assessments? - kellestracy1</p> <p><u>Student Performance Standards</u></p> <p>The application states that all students must be at or above grade level on EOGs and EOCs to be considered for promotion or graduation and then states that other factors will be considered by the principal. What role will EOGs and EOCs play in determining promotion?</p> <p>There is not documentation to define what high-school graduation requirements are beyond the service-learning graduation project. What local requirements does the school plan to implement for high-school graduation? How do these mesh with the state requirements? - lisa_huddleston</p> <p><u>Student Performance Standards</u></p> <p>Very detailed understanding - stephen_gay1</p> <p><u>Student Performance Standards</u></p> <p>At what point/time period will parents be notified that their student is not going to be promoted? Will this meeting be convened in enough time for students to possibly make corrections and be promoted? - danielle_allen</p> <p><u>Student Conduct and Discipline</u></p> <p>How will giving in-school suspension for level I infractions help at risk students excel? What are the goals of discipline at the school? How does the code of conduct promote those goals and how do the goals and code of conduct intersect with schools mission to "inspire, support, and enhance student learning...and prepare students for 21st century...and unlock students' full potential"? What age appropriate norms will be established and taught each day? How will the school establish and reinforce its core belief system in the context of its aforementioned character development program? How will students learn the schools' behavioral expectations in an age appropriate way so they</p>
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	<p>can learn how to self regulate and monitor their own behavior? - kellelytracy1</p> <p><u>Student Conduct and Discipline</u> Because appropriate behavior and discipline for a first grader is very different than that of a high-school student, the school needs more specific information for students at different grade levels. How will the school differentiate discipline based on the age of the student?</p> <p>What specific plans does the school have for the alternative placement that is mentioned? - lisa_huddleston</p> <p><u>Student Conduct and Discipline</u> Meets State requirements - stephen_gay1</p> <p><u>Student Conduct and Discipline</u> Has the board considered implementing a restorative justice discipline model? How does the outlined code of conduct reflect the school's commitment to serving a high-needs student population? - danielle_allen</p> <p><u>Certify Education Plan</u> Very detailed information. Shows a strong understanding of students and their needs. Well planned out and plans to have resources in place to serve - stephen_gay1</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Not currently in place! - stephen_gay1</p> <p><u>Certify Governance</u> The team lacks the requisite skill set to effectively hold the CMO accountable for measurable student outcomes. While complete the Governance section did not align with the other parts of the application. The CMO selection process and rationale for selecting Charters USA is not compelling. - kellelytracy1</p> <p><u>Certify Governance</u> Concerned about relationship with CSUSA: As noted - strong plan in place to meet the needs of your student population, but will CSUSA allow you to go outside of their normal operating procedures? - stephen_gay1</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Who on the proposed governing board has the level of expertise in education and administration to enable the board to understand, analyze and interpret student achievement data? What strategies will the proposed Board use to recruit members with the requisite skills, talents abilities, especially as it relates to finance, school administration, accounting, law, and real estate. - kellelytracy1</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The organizational chart seems inconsistent. Does the school really intend for the school attorney, PTA, and auditing firm to exist on a step between the Board and the Executive Director? Why does the Technology Coordinator report to the Behavioral Management Team and the Financial Secretary report to the Custodial Staff? How does Charter School USA fit into this chart?</p> <p>The mission statement in the application and in the bylaws are not the same. Why not? Which is the actual mission statement?</p> <p>The Board would benefit from legal experience and/or financial experience. If Ms.</p>

Carrington is compensated as the Executive Director, she may not be a voting member of the Board. Is there a plan to address this?

Is the Board planning to meet the number of times required by law instead of the five times proposed in the application?

How will the school evaluate Charter School USA should they enter into a contract?  
Determining this prior to signing the contract seems important. - lisa\_huddleston

Governance and Organizational Structure of Private Nonprofit Organization

Strong board with a clear understanding of the needs of the projected student population. - stephen\_gay1

Governance and Organizational Structure of Private Nonprofit Organization

Is part of the organizational chart cut off in the Appendix?

Why are the financial secretary and office assistant reporting to the custodial/transportation staff?

Board should ensure it has the expertise necessary to successfully oversee the various aspects of school operations.

Bylaws state the board can have 4-18 members. Has the Board considered any drawbacks to having a board as small as four or as large as 18? Should this number be amended? This also doesn't match what is in the governance narrative (which lists 5-8 members).

Board should ensure they're meeting the minimum number of times required by SBE policy.

Bylaws state that board members who miss 3 consecutive meetings "may" be removed; are there any other attendance stipulations around board membership?  
- danielle\_allen

Proposed Management Organization (EMO/CMO)

How will the proposed CMO further the schools mission? Does the CMO have other schools in the state that serve similar student populations (SWD, ED< ELL) if so how effective have they been in maintaining high levels of student achievement? Does the CMO have experience operating a STEM focused school in North Carolina? If so, what are the achievement levels at that school? Why hasn't the team entered into a formal relationship with the CMO, yet? - kelleystacy1

Proposed Management Organization (EMO/CMO)

There is not enough information about the proposed arrangement with Charter School USA. What are the specifics of the lowest achieving schools working with this organization?

Before entering into a contract with Charter School USA, the applicant should determine how to evaluate the relationship. What are the criteria that would be used to evaluate the management organization? - lisa\_huddleston

Proposed Management Organization (EMO/CMO)

The strong educational plan that is provided does not normally match CSUSA model - will they allow you the independence to develop the plan you wish to implement? -

	<p>stephen_gay1</p> <p><u>Proposed Management Organization (EMO/CMO)</u> School is no longer planning to partner with CSUSA. - danielle_allen</p> <p><u>Staffing Plans, Hiring, and Management</u> Strong plan - salaries are competitive - stephen_gay1</p> <p><u>Staffing Plans, Hiring, and Management</u> Staffing plan does not appear to match budget.</p> <p>Again, because the target student population is not clearly defined, it's difficult to tell whether the staffing plan is adequate or not. If the school intends to target economically disadvantaged students w/ disabilities, limited English proficiency, and intellectual disabilities, the board may want to reconsider (increase) the number of EC teachers/supports/training they plan to provide.</p> <p>Grievance policy for employees should outline the steps employees are to take to voice concerns or issues. What should employees do if they need to file a grievance unrelated to termination proceedings?</p> <p>What qualifications will the office assistant need to have, if he/she will be responsible for PowerSchool as well as manning the front desk? - danielle_allen</p> <p><u>Staff Evaluation and Professional Development</u> How will staff be trained to integrate STEAM? - kelleytracy1</p> <p><u>Staff Evaluation and Professional Development</u> 200 hours of professional development equates to five full weeks of work. The school has up to 70 hours scheduled in the calendar. Is the school concerned with teachers accomplishing an additional 130 hours in a year while also offering quality instruction to students? - lisa_huddleston</p> <p><u>Staff Evaluation and Professional Development</u> Meets standards - stephen_gay1</p> <p><u>Staff Evaluation and Professional Development</u> Applicant has budgeted \$15K for staff PD and is requiring each teacher to complete "up to 200 hours" of development. First, what is the minimum number of PD hours each teacher will be expected to complete? "Up to 200" is unclear. How did the applicant arrive at \$15K for PD for the entire staff? - danielle_allen</p> <p><u>Marketing Plan</u> Remember cost of SWAG -</p> <p>Good general plan - stephen_gay1</p> <p><u>Marketing Plan</u> How does the board plan to implement this marketing plan with only \$5,000 set aside in the budget for marketing? Can the board provide additional information (quotes, estimates, etc.) for the cost of each part of this plan? - danielle_allen</p> <p><u>Parent and Community Involvement</u> Community connections are a key - stephen_gay1</p>
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	<p><u>Admissions Policy</u> Will non attendance at the information session prevent a student from entering into the lottery? If so, explain how that requirement comports with the NC state education law? - kellelytracy1</p> <p><u>Admissions Policy</u> If parents do not attend the requested information sessions, will this have an impact on the child's application? - lisa_huddleston</p> <p><u>Admissions Policy</u> What will happen if a parent who has not attended a session submits an application for their child? Will they be allowed to enter the lottery?</p> <p>Geographic preference is not allowed for charter school admission lotteries, unless they are municipal charters. Board should ensure that their enrollment and admissions process is in accordance with NC charter statute. - danielle_allen</p> <p><u>Projected Student Enrollment (Table)</u> How was the decision made to start with K-4th grade? What was the rational for that decision? What potential stumbling blocks does the team foresee when it comes to enrolling students in 2nd, 3rd, and 4th grade given that they are not traditional transition points? - kellelytracy1</p> <p><u>Projected Student Enrollment (Table)</u> Is there a contingency plan in terms of staffing and budgeting if these enrollments are not met? - lisa_huddleston</p> <p><u>Projected Student Enrollment (Table)</u> Iredell - will a student travel to West Charlotte from Iredell CO - stephen_gay1</p> <p><u>Projected Student Enrollment (Table)</u> This is the first mention of recruiting students from Gaston and Iredell-Statesville counties. What evidence does the applicant have that parents living in these areas want to send their child(ren) to school in Charlotte? What percentage of those LEAs' ADM (for the specified grade levels) does the school project they will enroll?</p> <p>- danielle_allen</p> <p><u>Weighted Lottery</u> meets state requirements - stephen_gay1</p>
<p><b>Operations</b></p>	<p><u>Certify Operations</u> The Highmark relationship with this board and their relationship with Charters USA is concerning given the lack of real estate and legal expertise on the governing board. - kellelytracy1</p> <p><u>Transportation Plan</u> The year 2 budget allows for a bus contract and a bus, why is that needed? - kellelytracy1</p> <p><u>Transportation Plan</u> If the transportation form must be completed by April 1, what will happen to students who enroll or move after that date?</p> <p>There is money in the budget for the transportation contract. Beginning in year two, there</p>

is money allocated for a bus as well, but nothing allocated for maintenance or gas. Does the school intend to purchase buses? - lisa\_huddleston

Transportation Plan

How will you provide transportation to students who have it outlined as a related service on their IEP? - ginger\_cash

Transportation Plan

Beginning plan will meet needs of population - stephen\_gay1

Transportation Plan

What percentage of students does the school anticipate will require transportation services? Does the \$12K outlined in the budget for year 1 cover that expense? - danielle\_allen

School Lunch Plan

The child nutrition budget for year one is \$20,000. If this number is divided by the 180 school days, the applicant has allotted about \$111 per day to pay for a food program for the entire school. How will the applicant fund a breakfast and lunch program in a school targeted at economically disadvantaged students on this amount? - lisa\_huddleston

School Lunch Plan

Does not truly address the free and reduced - - stephen\_gay1

School Lunch Plan

What percentage of students does the school anticipate will require breakfast/lunch services? The applicant states there will be a "high" percentage- will \$20K cover breakfast and lunch for all of these students for an entire year? - danielle\_allen

Civil Liability and Insurance

The expenditure in the budget for insurance is \$18,000, yet this quote is over \$80,000. Where is this const reflected in the budget? - lisa\_huddleston

Civil Liability and Insurance

meets standard - stephen\_gay1

Civil Liability and Insurance

\$80K+ seems high for a yearly insurance premium for this proposed school. This doesn't match what's outlined in the budget, nor does it match what's outlined in the quote provided. Where did this \$80K figure come from? - danielle\_allen

Facility and Facility Contingency Plan

What role will Charters USA play in securing, building, and financing the new school? Is there a connection between Highmark and Charters USA? If so, what is that relationship? The facilities plan does not allow for labs space, why is that given the STEAM focus? - kellestracy1

Facility and Facility Contingency Plan

Is it realistic to find 12 properties to meet the specific needs of the school within the target area?

What does it mean that "the amount of square feet required per student is \$30,000"? - lisa\_huddleston

Facility and Facility Contingency Plan

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<p><b>Financial Plan</b></p>	<p>EMO - CSUSA and building by Highmark - so not using CSUSA construction wing? - stephen_gay1</p> <p><u>Certify Finance</u> The proposal, facility, operations, and financial reporting and controls are too dependent on the CMO and the Board lacks the expertise to hold the CMO accountable. There are lingering concerns about the relationship between Highmark and USA Charters and there seems to be double-dipping in terms of the roles and responsibilities of Highmark as leaseholder and financier of equipment? - kellelytracy1</p> <p><u>Certify Finance</u> Year 4 surplus is a question mark? - stephen_gay1</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Will you really pull 5 from Iredell to West Charlotte? - stephen_gay1</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Aligns with the numbers specified in Section 1, but the LEAs are different (Section 1 did not mention Gaston or Iredell-Statesville). - danielle_allen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Exception: Error Year 4: Technology Specialist: 100.00/\$26,350/\$2,635,000 If that is adjusted it falls in line with the other years.</p> <p>Check: Financial Representative - austin_smigel</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Plan early spoke of chrome books and whiteboards - may need to look at tech facilitator earlier than planned. The salary of \$37K for teachers will bring in only new teachers and that will impact your plan for all the services you wish to offer - stephen_gay1</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Why is there only 1 EFC listed here, when earlier in the application, it stated there would be 2? How is one individual supposed to meet with all 300 students once a week, create individualized goals, and provide support to the EC team?</p> <p>Given that the school plans to target high needs kids, does the salary allow for the recruitment and retention of highly qualified teachers?</p> <p>Is \$35K for a full-time school nurse reasonable???</p> <p>Number of staff under "Instructional Personnel Benefits" doesn't match the number of instructional staff outlined in the previous section.</p> <p>Appears to be a clerical error in the year 4 line item for technology specialist- 100 is likely incorrect. - danielle_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> The instructional budget seems under financed given the number of students year 1, why is that? Please provide a compelling rationale supporting the decision to allot just 10k for curriculum text for 300 students which amounts to just \$33 per student and does not increase years 2-5 even though the overall student population increase from 300 to 540 which means that by the end of the 5th year the school would have spent \$92 per student on curriculum texts, why is that? - kellelytracy1</p>
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Operations Budget: Expenditures 2018-2023 (Table)  
Technology cost appears low for supplying 300 students with chrome books. This amount would also not allow for the infrastructure to be built. Telecommunications system appears low.

Bus transportation contract appears low.

CMO arrangement alluded to but not budgeted for.

Y2-Y5 Busses but no gas, maintenance budgeted?

Instructional software appears to be high but the testing supplies appear to be low.

The initial year costs appear to be low but there would be a surplus of approximately \$250,00 in year one that would be able to be used for overages and unexpected expenses.

Based on information regarding the target school population the child nutrition budget appears to be low.  
- austin\_smigel

Operations Budget: Expenditures 2018-2023 (Table)  
Is there is an error on the technology specialist line in year 4?

The child nutrition budget appears low. How will this quantity provide for the students' needs?

Where in the budget are the Chromebooks provided for?

How much will the contract with Charter Schools USA affect the budget? - lisa\_huddleston

Operations Budget: Expenditures 2018-2023 (Table)  
How much do you have budgeted for provision of related services such as psychological, occupational therapy, physical therapy, speech/language, etc? - ginger\_cash

Operations Budget: Expenditures 2018-2023 (Table)  
Staff development budget is low if hire new teachers and try to implement all areas of your proposed plan - stephen\_gayl

Operations Budget: Expenditures 2018-2023 (Table)  
What is included in "other professional" for \$40K?

Why does the bus expense go from 0 in year 1 to \$49K in years 2-5? Should there be a bus expense in year 1? Are gas, oil, tires, and maintenance all included in the contract?

Marketing line item doesn't seem to match what's in the marketing plan.  
- danielle\_allen

Total Expenditure Projections (Table)  
There is an error in the personnel for year 4. - austin\_smigel

Total Expenditure Projections (Table)

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	<p>The surplus listed in the overall budget will be needed to meet some of the operational and instructional needs. How will these funds be reallocated? - lisa_huddleston</p> <p><u>Total Expenditure Projections (Table)</u> \$2.3 million net surplus in year 4? - stephen_gay1</p> <p><u>Total Expenditure Projections (Table)</u> Year four has a deficit, likely because of the clerical issue with personnel in the budget. - danielle_allen</p> <p><u>Budget Narrative</u> Please explain the financing terms that exist between the Board and Charter USA as the CMO as it pertains to purchasing of school "equipment etc". What specifically is meant by "equipment etc"? Please explain the rationale supporting linking the lease/mortgage payments to Highmark on school revenue? - kellelytracy1</p> <p><u>Budget Narrative</u> The financial narrative states that the school will contract with Charter Schools USA, but the actual budget does not reflect this. How will the school reallocate funds if they do develop this contract? How will they meet the compliance needs if they do not? - lisa_huddleston</p> <p><u>Budget Narrative</u> Again - why CSUSA for EMO and not using their building group? - stephen_gay1</p> <p><u>Financial Audits</u> What internal controls will be put in place at the school level? How will the Board monitor Charter USA and how much will the CMO charge the school for financial management and reporting systems? What goals will be put in place to hold the CMO accountable and to monitor effectiveness? - kellelytracy1</p> <p><u>Financial Audits</u> Since the board is no longer planning to partner with CSUSA, how will they manage financial reporting, student accounting, etc.? How will the board ensure adequate internal controls, if they're no longer relying on CSUSA to provide guidance in that area? Does anyone on the board have financial expertise? - danielle_allen</p>
<p><b>OVERALL</b></p>	<p><u>Grade Levels Served and Total Student Enrollment:</u> The enrollment and grade level projections are ambitious and not realistic year 1 would you consider starting k-1? Why or why not? - kellelytracy1</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Targeted opening enrollment is good and staggered growth will help with grow your own. The original 300 will help with budget - stephen_gay1</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Depending upon the evidence the applicant has gathered to support the need for this school (as well as the proposed location), 300 students in grades K-4 in year 1 may be quite ambitious. - danielle_allen</p> <p><u>Certify Application</u> Meets basic requirements - stephen_gay1</p>

Achieving Excellence Academy of Charlotte - The mission statement is as follows: To inspire, support and enhance student learning through the use of a specialized, technology enhanced STEAM curriculum, to prepare our students for the 21 century and to unlock each students full potential to achieve excellence in school and in life.

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

<b>Overall Summary</b>	
<b>Initial Screening</b>	<p>The Office of Charter Schools deemed this application incomplete on October 5, 2018. The following is needed for application evaluation:</p> <p>Appendix B2 was not submitted.            Section for board membership is missing answer to whether "disciplinary action was taken" for one board member.            Appendix F is missing board forms filled out and have incomplete background checks.            Appendix I is a letter, not the executed contract signed by both parties.            Appendix K is missing financial information for 2017.            Appendix N is a letter, not the actual form 990 for the last 3 years.            Appendix P is missing the complete form.</p> <p>Applicant responded to the incomplete information request by the October 12, 2018 deadline; however, the response submitted still contained incomplete or missing information. The following information remains outstanding:</p> <p>No background check submitted for R. Fruster; Appendix P not submitted in its entirety.</p>
<b>Application Review</b>	
<b>Application Interview</b>	
<b>OVERALL</b>	