



## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# Excelsior Classical Academy

**Public charter schools opening the fall of 2015**

**Due by 5:00 pm, December 6, 2013**

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

### 2013 Application Process

To open a charter school in the 2015-2016 school year

#### APPLICATION DUE DATE/TIME

**September 6, 2013** A letter of intent to apply for the 2015-2016 school year **must** be received electronically to Deanna Townsend-Smith in the Office of Charter Schools **no later than 12:00 noon at deanna.townsend-smith@dpi.nc.gov**. If the Letter of Intent is not submitted, an application from this group will not be accepted. You can find the Letter of Intent requirements on the NC Office of Charter School web site.

**December 6, 2013** A complete online application package, in the Office of Charter Schools **by 5:00 pm.**

**December 13, 2013** A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide an attached PDF version as evidence to the Office of Charter Schools (i.e. signed letter).

#### APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline December 6, 2013 at 5:00 pm. **All applicants 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 as a FULL PDF document.
2. Review all elements of your application for completeness before submitting. **An incomplete application will result in the elimination of the application.**
3. Late submissions **will not** be accepted. No exceptions.
4. Provide confirmation electronically to the Office of Charter Schools to [deanna.townsend-smith@dpi.nc.gov](mailto:deanna.townsend-smith@dpi.nc.gov) that within seven (7) days the applicant has provided one full copy of the application to the LEA in which the proposed charter school will be located.

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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: *Excelsior Classical Academy*

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

Name of non-profit organization under which charter will be organized or operated: *Excelsior Classical Academy CFA, Inc.*

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

Name of contact person: *Cynthia Gadol*

Title/Relationship to nonprofit: *Proposed School Director*

Mailing address: 1213 Carolina Avenue  
Durham NC 27705

Primary telephone: 919-797-9322 Alternative telephone: 239-405-2638

E-Mail address: *excelsior2015@gmail.com*

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

County: *DURHAM*

LEA: *320-Durham Public Schools*

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

No: X

Yes:

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

No: X

Yes:

What is the name of the nonprofit organization that governs this charter school? *Excelsior Classical Academy CFA, Inc.*

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

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

Projected School Opening: Year 2015 Month August

Will this school operate on a year round schedule?

No:

Yes: X

Proposed Grade Levels Served and Total Student Enrollment (

10

Years)

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,03,04	250
Second Year	K,01,02,03,04,05	300
Third Year	K,01,02,03,04,05,06	350
Fourth Year	K,01,02,03,04,05,06,07	400
Fifth Year	K,01,02,03,04,05,06,07,08	450
Sixth Year	K,01,02,03,04,05,06,07,08,09	500
Seventh Year	K,01,02,03,04,05,06,07,08,09,10	550
Eighth Year	K,01,02,03,04,05,06,07,08,09,10,11	600
Ninth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	650
Tenth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	650

*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 and that the initial board members and I were regularly involved in the development of this application. 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.*

excelsior2015  
Signature

\_\_\_\_\_  
Title

excelsior2015  
Printed Name

11/09/2013  
Date

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### **Mission:**

*State the Mission of the proposed charter school in **one hundred 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:*

Excelsior Classical Academy is a public charter school dedicated to providing excellence and equity in education by developing in every student a foundation of knowledge, a practice of reason, a quality of eloquence, and a habit of virtue, to prepare each student for a lifetime of learning and citizenship.

### **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.*

The targeted population for Excelsior will be all students in the Durham area, regardless of ethnic or socioeconomic background, who are interested in a high-quality, free, public, classical education.

Durham has a diverse population consisting of 42.5% Whites, 38.5% Blacks, 13.5% Hispanics/Latinos, and 4.2% Asians according to the 2011 estimate of the U.S. Census Bureau. We plan to locate Excelsior in a diverse area in North Durham to attract students of all ethnic and socioeconomic backgrounds. The desired student population will reflect the diversity of the area.

The rationale for selecting this location is our desire to provide an excellent school that teaches all students, regardless of socioeconomic or ethnic background, at a high level. Our school will have high academic expectations for all, doing everything possible to support students who do not have the background typically leading to success in academic settings. While the curriculum and methods to be used by Excelsior have proved efficacious in raising the academic performance of underperforming underprivileged students, they will provide every student a rigorous, content-rich education. Furthermore, in line with our civics and character education plan and logic instruction, we will emphasize each person is to be treated as an individual and with respect.

Excelsior will have a classical curriculum which promotes literacy, wide knowledge, critical thinking, effective communication, and ethics. No current Durham Public School or charter school in the area employs a classical curriculum. In addition, Excelsior will use the Core Knowledge Sequence in grades K-8. Core Knowledge has been successful in closing

achievement gaps between population segments around the country and is rich enough in content to provide challenge, interest, and growth to students at all levels of achievement.

- 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).*

There are approximately 15,800 students in grades K-5 in Durham Public Schools. We do not have a figure for grades K-4, but assuming the numbers are distributed evenly over those grades, we can estimate there are about 13,000 students in grades K-4. We project 250 students in grades K-4 in our first year. This is less than 2% of the estimate for those grades in Durham Public Schools.

The total projected enrollment for grades K-12 when all grades are added is 650 students. This is less than 2% of the more than 33,000 students currently enrolled in Durham Public Schools in grades K-12.

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

The significant difference between Excelsior and the local LEA is the combination of Excelsior's classical curriculum for all grades, the use of the Core Knowledge Sequence in grades Kindergarten through eight, and the affiliation with TeamCFA. TeamCFA works closely with the Core Knowledge Foundation. It provides grants to affiliate schools for training teachers to implement the Core Knowledge Sequence with fidelity. Art, music, and physical activity are integrated into the curriculum, and Spanish will be taught in grades Kindergarten through five. Latin will be taught in grades six through eight, and Logic and Rhetoric in high school.

Students at Excelsior will be praised for persistent effort in challenging tasks, not for success in tasks that are easy for them. Teachers will encourage students to challenge themselves and see setbacks as a chance to learn and try new strategies or to apply more effort. Teachers will focus on students' efforts and strategies, not on their natural abilities, thus helping them become mastery-oriented. Teachers will strive to help students focus on and value learning more than grades.

In addition, there will be a focus on civics and character education. Students will be treated as individuals and with respect, and will be taught to treat each other that way. Students will wear uniforms to minimize socioeconomic distinctions and to promote unity, order, academic focus, and school spirit. Teachers will have high academic and behavioral expectations and aspirations for all students, regardless of background. Teachers will work to help all students succeed.

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

**Purposes of the Proposed Charter School:** *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC*



*charter school statute GS 115C-238.29A, and the proposed school's operations.*

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

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

1. The integrated, coherent nature of Excelsior's curriculum provides much opportunity for collaboration within and between grades and among classroom/core subject teachers and special/elective teachers. Grade level teachers will have common planning times, providing opportunities to exchange ideas, maintain a consistent level of rigor, ensure continuity in the curriculum, and examine data as a group.

The use of the Core Knowledge Sequence, with its available training programs and classroom resources, will give teachers a logical, specific, and effective curriculum from which to teach while still having flexibility in planning the delivery of the material. Surveys conducted of teachers at Core Knowledge schools show high levels of satisfaction with the program.

Teachers will also have the opportunity to become leaders within the school community. They will be asked to be grade or department chairs, present best practices at staff meetings, and lead parental involvement programs. These opportunities will empower teachers while sharing best practices throughout the school community.

2. In addition to the end-of-year state tests, Excelsior will give national tests such as NWEA MAP at least twice a year to monitor student progress. The PSAT/SAT will be given annually in grades 8 through 12. The tests will be given on regular school days and paid for by the school. Scores will be used to monitor growth, and diagnostics from the test producer will be used to target areas of need. The administration and teaching staff will hold themselves accountable for the progress and growth of all students, regardless of students' backgrounds or situations.

3. Excelsior will provide parents and students of all backgrounds access to a classical curriculum which focuses on language skills and builds the background knowledge necessary for comprehension; promotes critical thinking and truth seeking; develops thoughtful, articulate individuals; and trains students to learn for themselves. Students will have the opportunity to study Spanish, Latin, and other languages. The curriculum includes the arts,

logic, rhetoric, and character education. Excelsior will grow to a K-12 school with a comprehensive, coherent curriculum which prepares students for higher learning and for active citizenship.

4. Core Knowledge, when implemented with fidelity, has proven to lead to dramatic academic growth for low-performing low-income students. According to a March 11, 2012 article entitled "Nonfiction Curriculum Enhanced Reading Skills, Study Finds" in the New York Times, a study of 1,000 students in New York City determined the following academic benefits of the Core Knowledge curriculum:

"Second graders who were taught to read using the Core Knowledge [Language Arts] program scored significantly higher on reading comprehension tests than did those in comparison schools. [For] each of the three years, students in the Core Knowledge program had greater one-year gain on a brief reading test than their peers in the comparison schools. The difference was most pronounced in kindergarten, when the scores of children following Dr. Hirsch's method showed increases that were five times those of their peers."

Additional studies from the Core Knowledge Foundation have shown the curriculum's significant advantage in reducing or eliminating the "fourth grade slump", the phenomenon whereby student achievement growth begins to plateau around fourth grade. This phenomenon has been observed with alarming frequency in low-achieving low-income students, as reading scores begin to depend more on background knowledge needed for comprehension skills.

Differentiated instruction modifies the instructional delivery to best meet the needs of all students. In a community consisting of students with varied educational backgrounds, differentiation will provide an education suited for each individual student's needs. This differentiated instruction will thus support the academic needs of the target population. However, even with the use of differentiated instructional strategies, all students will have the opportunity to be exposed to the same content knowledge across all subjects, and will be provided with the opportunity to learn core subject-matter to mastery. The content of the curriculum is rich enough to provide a rigorous education to all levels.

5. Increased learning opportunities are provided to all students in the alternate curriculum offered by Excelsior. The use of the Core Knowledge Sequence has been shown to raise the level of achievement for all and to close achievement gaps between disadvantaged (at-risk) and mainstream students. Alice DeVane reported in 1997 that results of research indicate that Latin education is related to improved general English comprehension (including reading, vocabulary, grammar and comprehension for both native speakers and English-language learners). At the secondary level, the study of Latin is related to increased levels of language achievement as demonstrated on both the Scholastic Aptitude Test (SAT) and the American College Test (ACT) verbal scores, and increased use of critical thinking as evidenced by increased mathematics scores on these same tests. Graduates of TJCA-CFA, a TeamCFA school with a similar program, have reported higher levels of college readiness than their class- and dorm-mates in the areas of research, writing, application of knowledge, and critical thinking.

6. Teachers at Excelsior will be trained in Socratic questioning to help students develop critical thinking skills and be able to construct their own

learning. Teachers will use a variety of instructional methods and practices such as direct instruction, class discussion and seminars, "read-alouds," small groups and flexible groups, independent work, and project-based learning, as appropriate. They will teach students to be growth- and mastery-oriented, using methods in Dr. Carol Dweck's "Mindset".

### **Goals for the Proposed Charter School:**

- 1. Provide specific and measurable student achievement performance goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. Address how often and when the information will be communicated to the governing board and other stakeholders. These goals should include specific and measurable performance objectives over the first five years of the schools existence.*

First and foremost, Excelsior's goal is to fulfill its mission. We will work to produce knowledgeable, rational, articulate, virtuous adults, and we will strive to close the gaps in achievement between mainstream and under-performing students.

Students in the Durham area have typically performed below the state level in both reading and math on the state tests and SATs. We believe that the students in the Durham area can learn and achieve. We will follow a Kennewick-style model, with targeted accelerated growth for our poorest performers. (Fielding, Kerr, & Rosier, 2007) We will strive for annual growth for all and catch-up growth for those who are behind.

We will employ the assessment, analysis, and action cycle described in Driven by Data (Bambrick-Santoyo, 2010). Excelsior will administer the NWEA MAP in grades K-9 in order to measure against nationally-normed proficiency and growth. The tests will be given at least twice a year, typically fall and spring, or fall, winter, and spring, as is done at other TeamCFA schools. The test data and reports will be used to allow teachers and staff to differentiate instruction and create tutoring groups. We will also use the PSAT and SAT to measure annual growth and proficiency in grades 8-12, along with the PLAN and ACT that are part of the state assessment program. In addition, grade teams will develop formative, subject-area assessments that are rigorous and specific. These will be used to coordinate standards and rigor across the student body and to provide grade teams with data upon which to act.

The primary assessment tool for measuring growth and proficiency in our first five years will be NWEA MAP. The test given at the beginning of the first year will provide a baseline both for the percentage of students who are proficient at grade level and for the growth of individual students. We will have a goal each year to increase the percentage of students who are proficient at grade level or higher and to increase the percentage of students who attain adequate growth.

Proficiency:

If the percent of students at or above grade level < 90%, our goal is to increase by 5% or more over the next year. For example, if 75% of students are proficient, then we would want to see at least 78.7% proficient the following year. That is  $.75 + (.75)(.05)$ .

If the percent of students at or above grade level > 90%, our goal is to increase by 1% or more over the next year. For example, if 90% of students are proficient, then the next year, we would want to see at least 90.9% proficient. That is  $.90 + (.90)(.01)$ .

We expect the first-year baseline level of proficiency to be below 90% of students, based on the targeted area.

**Growth:**

Our goal is to increase the percentage of students meeting growth targets by 2% each year for the next five years. For example, if 60% meet growth goals the first year, we would want to see at least 61.2% achieve target growth goals the following year. This is calculated as  $.60 + (.60)(.02)$ .

**High performance:**

Our goal is that students will perform above the district level and at or above the state level on all state-mandated tests.

**Stakeholder Satisfaction:**

Our goal is that Excelsior's teachers will show 90% satisfaction overall on the NC Teacher Working Conditions Survey and end-of-year school survey, and parents will show 90% satisfaction with the school on the end-of-year school survey.

**Excellence:**

Our long term goals are that all students will graduate, all will be accepted to college, at least 95% are at grade level or above, and at least 80% achieve targeted annual growth. While these goals are lofty and perhaps impossible to reach, as Vince Lombardi said, "Perfection is not attainable, but if we chase perfection, we can catch excellence."

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

The Board will use rubrics to measure the effectiveness of school governance, the implementation of sound business practices, and the academic program to ensure continuous improvement and measurable results so every student is prepared for a lifetime of learning and citizenship. (Rubrics are included in Appendix T.) The annual evaluation will include such measures as:

**Governance** - A majority of the board are non-related parties. Board meetings are conducted regularly and in accordance with Charter, Bylaws, Articles of Incorporation, and State Statutes. The board requires a monthly report from the school director. There is an active Parent/Teacher Organization. The board establishes and monitors a multi-year Strategic Plan or Improvement Plan. The board conducts an annual School Director evaluation concerning accomplishment and progress of the Strategic Plan or Improvement Plan. The board reviews the annual independent audit and determines that there are no negative findings. The board conducts annual board training.

**Business Practice** - The board monitors financial transactions through a recognized, regularly audited accounting system. Evidence of sufficient insurance that covers the school and directors is submitted for review. The board monitors the budget to make sure it provides sufficient resources to

support the school's core curriculum and mission.

Academic Achievement - The board examines annual academic scores and reports. The Core Knowledge Foundation makes periodic site visits. The board views the report from the Core Knowledge Foundation visit and monitors the school's progress toward becoming an official Core Knowledge site. The board monitors NWEA MAP results to make certain the school is meeting targeted growth and proficiency (TeamCFA's Academic Committee provides annual reports based on NWEA MAP data). The board examines the Professional Development Program to ensure that the school's mission and curriculum are being supported.

### 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.

Excelsior's curriculum and pedagogy are based on the classical Trivium, which comprises Grammar, Logic, and Rhetoric. These traditional disciplines correspond to stages of learning. The Grammar stage encompasses learning facts and background knowledge. In the Logic stage, Socratic questioning, logical argumentation, and discursive reasoning come to the fore. In the Rhetoric stage, knowledge and understanding are synthesized, connections are made between domains, and persuasiveness and eloquence are developed.

The stages of the Trivium also correspond to periods of schooling. During the Grammar stage, teachers provide a rigorous grounding in the basics of language arts, history, mathematics, science, art, and music by using the Core Knowledge Sequence. Teachers emphasize observation, memorization, and recitation in this stage. During the Logic stage, students must explain their answers and support their assertions with evidence. Research methods and citation are taught, and the ethics of scholarship are emphasized. In the Rhetoric stage, teachers emphasize public speaking, presentations, and a synthesis of the knowledge gained in various disciplines.

Excelsior's unified, sequential, coherent approach prepares graduates for a lifetime of active intellectual inquiry and citizenship. "For the sole true end of education is simply this: to teach [people] how to learn for themselves; and whatever instruction fails to do this is effort spent in vain." (Sayers, 1947)

Throughout the curriculum, preference is shown for original and primary sources over textbook summaries. Reading material is chosen to reinforce domain knowledge and vocabulary. In line with the Core Knowledge philosophy and the Common Core State Standards, complex texts, both fiction and non-fiction, are read and analyzed. Teachers use read-alouds to impart knowledge and introduce vocabulary at a higher level than the students' current reading ability allows, as spoken language ability tends to outstrip written in early years. Teachers check for understanding often and use rigorous formative assessments created to fit the curriculum. Nationally normed diagnostic tests are given at least twice a year to help parents and teachers monitor progress and address knowledge and skills deficits.

The arts and athletics play a crucial role. Beyond providing wide background knowledge that can increase reading comprehension, learning about the arts around the world, past and present, provides cross-cultural understanding

and a greater grasp of what it is to be human. Because physical activity improves concentration and memory and promotes cognitive development, it is included in each school day, in PE, recess, or classroom activities.

Martin Luther King, Jr wrote,

"[E]ducation has a two-fold function to perform ... Education must enable one to sift and weigh evidence, to discern the true from the false, the real from the unreal, and the facts from the fiction. The function of education, therefore, is to teach one to think intensively and to think critically. ... [But, w]e must remember that intelligence is not enough. Intelligence plus character-that is the goal of true education. The complete education gives one not only power of concentration, but worthy objectives upon which to concentrate." Character education is integrated into daily lessons and emphasized through service learning, our student creed, our honor code, assemblies, posters, announcements, and bulletin boards. Teachers and staff model the behaviors and character traits we wish to instill in our students.

Among the character traits we want to instill are a strong work ethic, perseverance, and resilience. We will use techniques described by Dr. Carol Dweck in "Mindset" to promote a growth mindset that relishes challenges, sees setbacks not as a sign of low intelligence but as an opportunity to learn, and expects that learning new things makes one smarter.

### **K-5 Curriculum and Instructional Design:**

*Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.*

The Core Knowledge Sequence provides engaging and rich content which promotes critical and creative thinking, problem-solving skills, and specific knowledge to students of all abilities in grades K-5, helping them to compete academically throughout the nation and the world. The design of the Core Knowledge curriculum provides teachers with ample content and the opportunity to scaffold assignments. The cohesiveness and spiraling nature help students progress to the next grade. Additionally, Core Knowledge supports differentiation because the same content can be taught at varying levels of exploration and understanding, which is ideal for ELL, EC, and gifted students.

In grades K-5, the basic learning environment is classroom-based. Assuming each grade level has up to 50 students, there will be two sections per grade. The typical class size will be 23-25 students. Each Kindergarten teacher will be supported by a teacher's assistant. First grade will have one shared assistant, as will second grade. Students will not be tracked, and Excelsior will use an inclusion model for exceptional students, with pull-outs when necessary. In the first year, we will have two licensed EC teachers. English-language learners will receive either contracted or in-house services, depending upon numbers. Students in grades K-5 will receive some direct instruction as a whole class. They will also participate in differentiated small groups as appropriate, and there may be some flexible grouping among classes within a grade.

On a typical school day, morning hours will be devoted to reading, language,

and math, with integrated content from the sciences and social studies when meaningful. This is the common approach to the Core Knowledge Sequence. Active engagement in learning will be maintained with the rich and rigorous Core Knowledge curriculum and with the use of best instructional practices to make learning interesting and exciting. Social studies and science are taught specifically when not integrated in the morning's reading, language arts, or math. To complement the Core Knowledge Sequence and to provide a strong foundation for the Logic stage of learning, Excelsior will use Singapore math in grades K-5. Reading and writing will be applied across all subject areas. Hands-on, interactive learning will be encouraged across all subjects as appropriate. Through a focus on civics and service, students will begin to understand their role as citizens in the school, their community, and society.

Provide a synopsis of the planned curriculum, including:

1. *One sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for the elementary division the school would ultimately serve.*
2. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

In grades K-5, Excelsior's Core Knowledge curriculum is aligned with Common Core State Standards and will meet or exceed the standards of the North Carolina Accountability Model. The Core Knowledge Language Arts program has a strong phonics base to help students learn scanning and decoding, but it also teaches reading through content. The Core Knowledge Sequence promotes literacy and creates a broad knowledge base to improve reasoning, critical thinking, and written and oral communication skills. Core Knowledge allows even those whose background knowledge base is limited to build their knowledge and comprehension through the use of fiction and non-fiction texts, teacher "read-alouds," and independent reading.

The Core Knowledge Foundation's motto is "educational excellence and equity for all children." They offer assistance and materials to schools and parents. Excelsior Classical Academy CFA shares their belief that every person in a diverse democratic society deserves equal access to the common knowledge base which draws together its people while recognizing their differing traditions and contributions. Offering universal access to this shared knowledge is a primary duty of schooling; it is critical to literacy and to the closing of achievement gaps between socioeconomic and racial groups.

Integrated into our curriculum is training in ethics and virtuous habits. Students will be taught to treat others with respect and civility. They will study the history of their country and their world, learning about the contributions and struggles of various peoples and groups. They will accumulate shared knowledge, a shared narrative, and shared ideals of liberty and tolerance which are indispensable ingredients for effective citizenship and for the perpetuation of our democratic institutions.

3. *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.*



Teachers of grades K-5 will be trained in implementing Core Knowledge. They must understand the philosophy behind the curriculum and know the content of the curriculum, at least for their own grades. They must produce with their grade teams Curriculum Plans, Domain Maps, and lesson plans. Teachers in grades K-3 must be well-versed in phonics and reading strategies, and must understand the importance of teaching content to enhance reading comprehension.

Teachers must understand the math concepts for their own grades and have the "big picture" of where the students need to be by the end of high school. They must realize that students need to grasp concepts and be able to apply them to new and different situations and problems. Memorizing formulas and math facts frees up working memory and allows students to learn new material more easily. Students who have mastered concepts along with learning facts will be better able to retain what they learn and move on to the next level of knowledge and understanding.

Teachers will be expected to have "academic optimism" for all students, regardless of background. This is a characteristic common among schools that have closed or significantly narrowed achievement gaps. Academic optimism entails encouraging academic achievement and expecting excellence. (Brown, Benkovitz, Mutillo, & Urban, "Leading Schools of Excellence and Equity," 2011) To help teachers achieve academic optimism for all, we will have workshops on such topics as implicit association and cross-cultural understanding, and we will encourage self-reflection among our teachers.

Teachers must use good grammar when speaking and writing. They will be expected to model the academic and character traits that we want to develop in our students. They must behave in a way that is positive, caring, and non-defensive when dealing with other staff members and with students and their parents. Teachers will be "relentlessly respectful and respectfully relentless" in teaching students the expected behaviors and procedures for each activity. While some teachers can tolerate more activity and noise than others, all teachers will be expected to manage their classrooms in a way conducive to learning.

All teachers are expected to master the motivational strategies found in Carol Dweck's "Mindset." When students succeed, teachers should praise their efforts or their strategies, not their intelligence. When students struggle or fail, teachers should give feedback about effort, strategies, or what the students did wrong and what they could do now. Helping students value effort is a key ingredient in creating mastery-oriented students. Too many students think effort is only for the inept, but sustained effort over time is the key to outstanding achievement. Rather than praising students for doing well on easy tasks, teachers should convey that doing tasks already mastered does not engender growth. They should transmit the joy of working to find successful strategies and of confronting a challenge. Teachers should help students focus on and value learning more than grades.

Teachers will be expected to understand differentiation strategies and inclusion, and must be aware of the rights and needs of EC and ELL students. Teachers will receive training in these areas. Teaching from a strong curriculum and complex texts to all students with differentiation, modification, and support where needed helps all achieve.

Teachers will be expected to be familiar with Dorothy Sayers' essay "The Lost Tools of Learning." They will receive training in Socratic questioning and Paideia seminars. These will help teachers understand the mission of the school and how to help students to become literate, thoughtful, articulate citizens.

Finally, teachers will be trained in the data collection, assessment, inference, and response cycle for continuous improvement. Data-driven instruction strategies help teachers focus on what actually improves student learning.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

The school calendar provides 185 days of instruction, with a shorter break in the summer than a traditional calendar has. We expect less time off in summer will help keep students focused and reduce the amount of review that is necessary at the beginning of the school year. According to a study by Vanessa St. Gerard, students lose skills in math and spelling and many also lose reading skills during their traditional summer vacations. This loss is greater for economically disadvantaged children. More time is lost because of the review necessary when they return to school. Gerard also mentions benefits of year-round school: there are vacations more often to break up the long stretch of school and refresh both the staff and students, and there is the possibility that during these breaks remedial and enrichment classes can be offered. ("Year-Round Schools Look Better All the Time", 2007)

The more frequent breaks and shorter summer break will make the school year more coherent and will be conducive to an attitude of continual learning. This should also reduce the significance of between-grade transitions and make them easier. The year-round academic calendar fits very well with Excelsior's coherent, sequential curriculum, and we expect it to help us achieve educational excellence and equity.

We plan to offer remedial and enrichment camps and activities at the school during the fall, spring, and summer breaks.

In our first year, school will start in early-to-mid-August to help ensure that our facility is ready before the start of school and that we do not create difficulty in meeting our goals for student enrollment. This will mean the loss or abbreviation of the fall break the first year. In subsequent years we plan to start in July and have a longer fall break. As parents enroll their children in Excelsior, we will make certain they understand the plan is to have a year-round school calendar and that the first year will be slightly different.

### **6-8 Curriculum and Instructional Design:**

*Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.*

In grades 6-8, students will learn primarily in a classroom-based setting.

Class size will continue to be between 23 and 25, generally. Students will begin changing classes in 6th grade, with a Cultural Studies block (Language Arts and History), Math, Science, Art, Music, Latin, and PE. In seventh and eighth grade, they will have separate classes for Language Arts and History, as well, but the curriculum will still be integrated. Throughout grades 6-8, they will continue the use of the Core Knowledge Sequence to provide engaging and rich content that promotes critical and creative thinking, problem-solving skills, and specific knowledge to students of all abilities. As students mature and become more inquisitive, there is an increased emphasis on the logic stage of the Trivium (see Instructional Program).

The design of the Core Knowledge curriculum provides teachers with ample content and the opportunity to scaffold assignments that help students progress to the next grade. In addition, Core Knowledge is a spiraling curriculum that builds upon itself throughout K-8 and provides a strong foundation for much more sophisticated intellectual growth in high school.

In grades 6-8 we add Latin to the curriculum as part of the grammar aspect of the classical curriculum. The study of Latin grammar also benefits students by promoting logical thinking, and Latin vocabulary helps build vocabulary in English.

Character education continues with integrated lessons and opportunities for service learning in the school and the community.

Provide a synopsis of the planned curriculum, including:

1. **One** sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B1) for one core subject (specific to the school's purpose) for the middle school division the school would ultimately serve.
2. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.

In grades 6-8, Excelsior's Core Knowledge curriculum is aligned with Common Core State Standards and will meet or exceed the standards of the North Carolina Accountability Model. The Core Knowledge Sequence promotes literacy and creates a broad knowledge base to improve reasoning, critical thinking, and written and oral communication skills. Core Knowledge allows even those whose background knowledge base is limited to build their knowledge and comprehension through the use of fiction and non-fiction texts, teacher read-alouds, and independent reading.

Excelsior chose the Core Knowledge Sequence to provide the necessary general knowledge to a diverse student population because it provides students in K-8 with a coherent, cumulative, and content-specific curriculum. Core Knowledge exceeds the math requirements for the state of North Carolina and prepares all students to take Algebra I in the 8th grade. In addition, broad, rich content knowledge is integrated into the many hours devoted to language arts instruction, and language skills are reinforced with reading and writing across the curriculum in all subject areas.

Students in sixth through eighth grade at Excelsior study Latin as part of the grammar aspect of the classical curriculum. The study of Latin helps build students' vocabularies and improves their understanding of grammar in

English. Numerous evaluations of Latin study programs have shown that students who take Latin improve in a wide variety of areas, including reading comprehension, vocabulary, and even math and critical thinking skills, with underprivileged children making the greatest gains. (Efficacy of Latin Studies in the Information Age, Alice K. DeVane, 1997) Research indicates that Latin education at all grade levels, particularly at the elementary and intermediate grade levels, is associated with improved general English comprehension (including reading, vocabulary, grammar, and comprehension for both native and non-native speakers), and in facilitating the acquisition of a second foreign language (Holliday, 2012; Rasinski, Padak, Newton, & Newton, 2011). At the secondary level, some studies indicate that the "length of time students spent studying a language (three or more years) was positively correlated with SAT scores" (Holliday, 2012, p. 8). Excelsior strongly supports the study of foreign language, as evidenced by the study of Spanish in grammar school and the language requirement at the high school level; the study of Latin in grades 6-8 supports students' immediate studies as well as courses taken in high school.

In addition, we will continue to focus on building character, through integrated lessons, emphasis in assemblies, announcements, posters, and through service learning.

3. *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.*

Teachers of grades 6-8 will be trained in implementing Core Knowledge. They must understand the philosophy behind the curriculum and know the content of the curriculum, at least for their own grades. They must produce with their grade teams Curriculum Plans, Domain Maps, and lesson plans. Teachers in grades 6-8 understand the importance of teaching content to enhance reading comprehension, and must promote literacy across the curriculum. They must also include writing across the curriculum.

Teachers must understand the math concepts for their own grades and have the "big picture" of where the students need to be by the end of high school. They must realize students need to grasp concepts and be able to apply them to new and different situations and problems. Memorizing formulas and math facts frees up working memory and allows students to learn new material more easily. Students who have mastered concepts along with learning facts will be better able to retain what they learn and move on to the next level of knowledge and understanding.

Teachers will be expected to have "academic optimism" for all students, regardless of background. This is a characteristic common among schools that have closed or significantly narrowed achievement gaps. Academic optimism entails encouraging academic achievement and expecting excellence. (Brown, Benkovitz, Mutillo, & Urban, "Leading Schools of Excellence and Equity," 2011) To help teachers achieve academic optimism for all, we will have workshops on such topics as implicit association and cross-cultural understanding, and we will encourage self-reflection among our teachers.

Teachers must use good grammar when speaking and writing. They will be

expected to model the academic and character traits that we want to develop in our students. They must behave in a positive, caring, and non-defensive way when dealing with other staff members, students, and parents. Teachers will be "relentlessly respectful and respectfully relentless" in teaching students the expected behaviors and procedures for each activity. While some teachers can tolerate more activity and noise than others, all teachers will be expected to manage their classrooms in a way conducive to learning.

All teachers are expected to master the motivational strategies found in Carol Dweck's "Mindset." In a growth mindset, people believe their basic abilities can be developed through dedication and hard work; brains and talent are just the starting point. This view creates a love of learning and a resilience that is essential for achievement. Thinking about intelligence as changeable results in greater academic achievement, especially for those burdened with negative stereotypes about their IQs. We cultivate a growth mindset by teaching intelligence can grow and by praising hard work and perseverance, not native ability.

Teachers will be expected to understand differentiation strategies and inclusion and be aware of the rights and needs of ELL and EC students. Teachers will receive training in these areas. Teaching from a strong curriculum and complex texts to all students with differentiation, modification, and support where needed helps all achieve.

Teachers will be expected to be familiar with Dorothy Sayers' essay "The Lost Tools of Learning." They will receive training in Socratic questioning and Paideia seminars. These will help teachers understand the mission of the school and how to help students along the way to becoming literate, thoughtful, articulate citizens.

Finally, teachers will be trained in the collection, assessment, inference, and response cycle for continuous improvement. Data-driven instruction strategies help teachers focus on what actually improves student learning.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

Excelsior's calendar for middle school will be a year-round format with 185 instructional days. Studies indicate that ELL, at-risk, and advanced students who attend year round schools show an increase in learning, performance, and engagement (Lyttle, 2011; McFadden & McMahon, 2013). This supports our mission of equitable education and high performance for all students.

We will offer camps and activities in the spring, summer, and fall breaks to provide enrichment and support continued learning for at-risk students.

### **9-12 Curriculum and Instructional Design:**

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.

The general learning environment for Excelsior's high school is primarily

classroom-based. Classes generally will contain 23-25 students, although class size will vary based on student course selection. The four core subjects (English/language arts, math, science, and social studies) meet daily. In addition to the four core subjects, students will have a choice of electives, such as foreign language, technology, and the arts. The high school curriculum at Excelsior exceeds the graduation requirements for the state of North Carolina because our philosophy is to deliver students a rigorous, challenging curriculum that provides them with exceptional skills no matter what endeavors they choose to pursue after high school.

To that end, all students will take logic and rhetoric in high school, and all will complete a senior thesis project. Additionally, students must take:

- \* three years of a language in high school, and if they have not taken Latin in grades 6-8, that language must be Latin,
- \* four years of English and history, and
- \* three years of science and math.

Seniors will have two electives, and they will be advised to take additional science and math courses. All courses at grades 9-12 will be taught at the honors level and advanced placement (AP) courses will be offered for many subjects.

At the high school level, the classical model of instruction plays an especially important and prominent role that supports the curriculum and encourages students to be critical thinkers and problem solvers. Just as at the grammar and middle school level, effort is emphasized over talent, and students will be encouraged to put forth their best effort to achieve goals they may not have thought possible before.

Juniors will take a formal course in rhetoric, which will help prepare them for the capstone of the classical education at Excelsior, the senior thesis project. Seniors will research, write, present, and orally defend a paper on a topic of choice.

As in earlier grades, in-class instruction will be supported and enhanced by after-school enrichment programs, clubs, and organizations. In addition, activities or camps during the breaks will continue to be offered to high school students, which will increase the sense of community between faculty, administration, and students, especially at this age when so many students begin to feel isolated. After-school programs and break activities will be designed to support the interests of teenagers. Additionally, high school students will be afforded the opportunity to work with younger grade camps under faculty supervision. Student assistants will submit a resume and interview for the positions, which will provide valuable experience to help them as they make their way into the workforce.

We will teach using direct instruction, small groups, hands-on activities when appropriate, field trips, Socratic questioning, and Paideia seminars. Students will learn about research, academic integrity, and citation.

Provide a synopsis of the planned curriculum, including:

1. *One sample course scope and sequence for one core subject (specific to the school's purpose) (Appendix B2).*
2. *As Appendix B3, provide a visual disseminating what courses (core content and electives) will*

*be offered in year one through year five of the charter high school. Please ensure the projected staff and budget aligns with the course offerings.*

*3. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

The high school program offers rigorous, challenging, and interesting courses in a classical model and is designed to give all students the opportunity to learn at a high level. The academic optimism and the growth mindset of Excelsior have been shown to increase achievement particularly among students who have suffered under negative academic stereotypes.

Horace Mann (1848) said, "Education then, beyond all other devices of human origin, is a great equalizer of the conditions of men, the balance wheel of the social machinery." That is how it should be, but in order for that to be true, the educational quality for all must be equal. According to Brown, Benkovitz, Mutillo, & Urban (2010), Hispanic and Black students are disproportionately represented in EC classes and underrepresented in high level classes. At Excelsior, we will encourage all students to take academically challenging classes and give them the support they need to succeed.

Excelsior's high school curriculum sequence exceeds the NC Future-ready Core graduation requirements. Alignment with Common Core and NC Essential State Standards ensures students are prepared for testing under the NC Accountability Model.

Our courses in Logic and Rhetoric complete the focus on the Trivium and help our students become thoughtful, articulate adults. In Rhetoric class, students will begin the study of philosophy, using such thought-provoking speeches, essays, and books as Martin Luther King Jr's I Have a Dream and Letter from Birmingham Jail, Plato's Dialogues, Aristotle's Nichomachean Ethics, Mortimer Adler's Six Great Ideas, and Harvard professor Michael J Sandel's Justice: What is the Right Thing to Do? to help students grapple with age-old questions of right and wrong. Service in the school and community will further develop character. We will encourage discussion of the duties and responsibilities of citizenship in high school social studies class.

*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.*

All high school faculty must be familiar and comfortable with teaching methods related to the classical model of the Trivium. This kind of learning requires teachers to skillfully use a wide range of instructional strategies. Highly effective teachers must be able to instruct students in a whole-class or small-group setting, as well as facilitate instruction and engagement successfully in cooperative settings. In some subjects, such as foreign language, teachers will use recitation. However, all instructors must be skilled at using the Socratic Method. In this method, teachers incorporate thoughtful questions to arouse student curiosity and help students think critically about complex topics through an incremental process, often modeling their own thinking. Answers to questions generate further questions, allowing for a richer, deeper, subtler understanding of the subject.

Although Core Knowledge does not extend to high school, the high school teachers should have an understanding of what the Core Knowledge Sequence is and how it works. They should also continue the integration and collaboration that is a hallmark of the Core Knowledge Sequence. Grade level teams should meet at least weekly in order to coordinate and collaborate as much as possible, and departments should ensure alignment. They should also practice the data-driven instructional cycle.

Teachers need to be adept at personalizing learning and at modifying lessons for students with disabilities or language barriers, as well as with those who are gifted or moving at a rapid pace. These strategies are designed to maximize student engagement and develop critical thinking skills in a classroom with a teacher who can draw upon a wide repertoire of instructional strategies. Teachers are expected to follow the methods of Dr. Carol Dweck for promoting a growth mindset. Teachers must display academic optimism and expect and encourage all students to achieve.

Much of the best learning follows effective critique. Teachers at Excelsior will be encouraged to allow students the opportunity for self-critique and peer review as well as to receive feedback from the teacher. Feedback to students, both formal and informal, is regular, supportive, and designed to help students grow and be successful.

As in the lower grades, teachers must be familiar with Dorothy Sayers' essay, Paideia seminars, and Socratic questioning, and they must model good grammar and the academic and character traits we wish to develop in our students.

5. *Explain how the proposed instructional plan and graduation requirements will ensure student readiness for college or other postsecondary opportunities (trade school, military service, or entering the workforce).*

As a classical curriculum teaches students the tools of learning, critical thinking, and the ability to speak and write persuasively, it prepares individuals for college and other post-secondary opportunities. Many college professors, leaders in the military, and employers bemoan the lack of critical thinking and communication skills in students, recruits, and new employees. Graduates of TJCA-CFA, our sister school, have reported being much better trained in writing and research than most of their peers, even in upper tier colleges. At Excelsior, we will train students in these vital skills and provide them with a broad knowledge base and the tools that facilitate new learning.

According to the "Languages for Jobs Initiative" of the Council on Foreign Relations, "The promotion of foreign language instruction should be a national priority. In an increasingly competitive international economy, a workforce with more market-relevant foreign language skills is a strategic economic asset for the United States." The study of foreign language in grammar school and high school promotes global thinking and prepares students for the global marketplace.

Cicero, a great Roman statesman, said "Not to know what happened before you were born, that is to be forever a child." Our emphasis on learning history, in Core Knowledge and in high school, provides understanding that is primary to all realms of knowledge. Even science and math are tied to history, as



what we learn and discover in these fields builds on what others before us have learned and discovered. Excelsior students will study not only history, science, and math, but art, music, languages, and cultures. They will develop an understanding of the world that will help them understand themselves, their own culture, and the diverse contributions to that culture. They will be prepared to grapple with ideas and concerns that face their country and community. Likewise, the broad content knowledge and analytic skills gained in the sciences will enable students to become adults capable of reading about and voting wisely on science-related concerns such as energy production, genetic research, and conservation.

Logic and predictive skills such as inference will help students make rational life and job decisions. The ability to debate topics without resorting to incivility and personal attacks will help them be better citizens and leaders. Most Excelsior graduates will have had more math courses than the average, because they will take Algebra I in eighth grade and then take at least three higher math courses in high school, plus they will have a logic course that delves into statistics, probability, and discrete math. Mathematical and logical thinking will help them be better problem solvers.

Perhaps most importantly, students at Excelsior will receive character education that teaches them to value and seek truth, to treat others with respect, and to practice virtue. They will learn perseverance and responsibility. Pupils will learn from teachers trained in Carol Dweck's "Mindset" theory. The goals of this method are teaching students to value hard work, learning, and challenges; teaching them how to cope with disappointing performance by planning for new strategies and more effort; and providing them with study skills that put them more in charge of their own learning. These attributes and skills will help graduates in any post-high school endeavor.

Excelsior will educate citizens. Jefferson said, "I know of no safe depository of the ultimate powers of the society but the people themselves; and if we think them not enlightened enough to exercise their control with a wholesome discretion, the remedy is not to take it from them, but inform their discretion." While the founding fathers executed their vision of equality selectively, a citizenry that is trained in reasoning, civics, and character can bring equality under the law and equality of opportunity to all Americans.

*6. If implemented, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts?*

Future-Ready Core requirements will be met within Excelsior Classical Academy's course and credit requirements. (See Appendix B3.) Along with the Future Ready Core Course of Study requirements of four English credits, four math credits, three science credits, three social studies credits, and one P.E./Health credit, Excelsior students must have one credit each in Logic, Art History, and Rhetoric, and must have at least three credits of the same Language. They will take a sequence of World History, European History, US History, and Civics and Economics, or comparable courses. They must each also complete a senior thesis project. If a student does not attend

Excelsior in grades 6-8 and/or has not passed at least three years of Latin before, the language taken in high school must be Latin. Students at Excelsior will take the Art History class in ninth grade in the normal course of things, at the same time they take World History.

Each high school course will be worth one credit. Credit will be earned upon successful completion of a course with a passing grade.

Grade Point Averages (GPAs) will be computed using the final course grades at the end of the school year. GPAs will be cumulative through high school. Both unweighted and weighted GPAs will be computed, and weighted GPAs will be used to determine class rankings.

Excelsior will use a standard numeric grade scale. The scale is: A=93-100, B=85-92, C=77-84, D=70-76, F=69 or below. The quality points per grade are: A=4.0, B=3.0, C=2.0, D=1.0, F=0.0. For weighted GPAs, one quality point is added to a passing grade in an honors or advanced class and 2 quality points are added to a passing grade in an AP class.

A student's transcript will include weighted and unweighted grade point averages, class rank, course codes and names, units earned toward graduation, credits earned for admission to an institution of higher learning, and any end-of-course test scores.

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 school calendar provides 185 days of instruction, with a shorter break in the summer than a traditional calendar has. We expect that decreased time off in summer will help keep students focused and reduce the amount of review that is necessary at the beginning of the school year. According to a study by Vanessa St. Gerard, students lose skills in math and spelling and many also lose reading skills during their traditional summer vacations. This loss is greater for economically disadvantaged children. More time is lost because of the review necessary when they return to school. Gerard also mentions benefits of year-round school: there are vacations more often to break up the long stretch of school and refresh both the staff and students, and there is the possibility that during these breaks remedial and enrichment classes can be offered. ("Year-Round Schools Look Better All the Time", 2007)

The more frequent breaks and shorter summer break will make the school year more coherent and will be conducive to an attitude of continual learning. This should reduce the significance of between-grade transitions and make them easier. The year-round academic calendar should fit very well with Excelsior's coherent, sequential curriculum.

We will offer remedial and enrichment camps and activities at the school during the intersessions. In later years when we have high school students, we will encourage them to volunteer to help with these camps and activities, providing opportunities for leadership and service. We will also offer camps geared for high school students, such as music, art, dance, or drama camps,

math or science enrichment activities, and college and career camps.

In our first year, we will start in early-to-mid-August to help ensure that our facility is ready before the start of school and that we do not create difficulty in meeting our goals for student enrollment. This will mean the loss or abbreviation of the fall intersession the first year. In subsequent years we plan to start in mid-July and have a fall break. As parents enroll their children in Excelsior, we will make certain they understand the plan is to have a year-round school calendar and that the first year will be slightly different.

### **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.*

Our goal is to offer early intervention at the first sign of academic difficulties to improve student learning for all students, including those who have learning disabilities.

We will administer MAP tests at least two times annually for all students in grades K-9 to monitor student progress. In addition, we will use the PSAT and SAT and the state-administered PLAN and ACT to monitor student progress in grades 8-12. Both the PSAT and the PLAN offer diagnostics that help identify areas of weakness. All of these tests will provide data about areas in which students may be struggling and will allow teachers and parents to focus on these areas.

Teachers, based on these data and data collected from classroom assessment, may refer students who are identified as having difficulty and not making adequate progress to our Intervention Team. The Intervention Team will be made up of our Academic Dean, an appropriate grade-level General Education representative, an Exceptional Children's teacher, a psychologist or school counselor, and the School Director.

The Intervention Team will devise a plan of interventions for the classroom teacher (and parent) to use to help the student. These will be implemented for the prescribed amount of time, with careful monitoring and documentation. If the student shows no progress in the area of difficulty, a second set of escalated interventions will be implemented, with closer monitoring. Only after two sets of research-based interventions have been implemented and the student continues to show low achievement will the Intervention Team refer the child for testing for disabilities.

Some interventions to improve student learning are:

- 1) We at Excelsior Classical Academy consider parental involvement to be extremely important to a student's academic success. At the first sign of concern, the classroom teacher will contact the parent to impart the information about the difficulties and make suggestions to help. For many students, parental participation will be sufficient. But for others, further

intervention will be necessary.

2) Flexible grouping, small groups, and differentiation techniques will be used in the classroom.

3) As appropriate, a student may be recommended or required to attend weekly after-school tutoring. (All teachers at Excelsior will be required to offer tutoring weekly.) If a student is struggling or at risk of failing, the teacher may recommend or the parent may request weekly tutoring. A student who is failing will be required to attend, as per our academic probation policy.

4) In addition, Excelsior will offer an after school study group for any students who lack homework support at home. Based on recommendations from classroom teachers, students will be invited to stay 50 minutes after school to work on homework Monday through Thursday. One or more teachers, along with paraprofessional volunteers, will answer student questions, check homework planners, and motivate students to stay on task.

5) If further escalation is necessary, a student may be referred to tutoring services. Parent approval will be obtained before tutoring begins. At-risk students will meet in small groups with school staff or paraprofessional volunteers (such as local college students and community members) before school, after school, or during school. Excelsior will require background checks, confidentiality statements, and training for all volunteer tutors. The lesson plans will be determined by the Academic Dean and the HR Manager in consultation with the classroom teacher. The reading instruction will correspond to the Core Knowledge Domain Maps (curriculum unit schedules) for each grade. Core Knowledge content will be reinforced by other selected readings. Language and Math tutoring will reteach and expand daily classroom content.

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.*

1. English Language Learners who transfer in from other schools already identified as ELL students will qualify for English as a Second Language (ESL) services at Excelsior Classical Academy CFA. ELL students who are new to the area will be identified through Home Language Surveys. These surveys are a part of the student registration packet. All students will be required to return a completed Home Language Survey before starting class. Those who list a language other than English on their Home Language Survey will be required to take the WIDA Access Placement Test (W-APT). Once a student has qualified for ESL services, the school Limited English Proficiency (LEP) team will meet to discuss which services the student would benefit from. The team may include the student's classroom teacher, the ESL instructor, the parent(s), Excelsior's Academic Dean/Curriculum Coordinator, and others, such as an EC teacher, who may also work with the student. The services that will be discussed at the meeting are a) the amount of in-class and out-of-

class tutoring per week by ESL instructors, b) the amount and level of accommodations and/or modifications for class work and testing, and c) the amount/type of assistive technology devices (such as native language dictionaries, etc.) the student will use, if any.

2. Based on the LEP team's recommendations, the ESL instructor will work in-class with the student or out-of-class in small groups or one-on-one. Vocabulary and content will be generated by the Core Knowledge curriculum being used in class. The instructor will ensure that students understand the key vocabulary being presented in each Core Knowledge unit as well as incidental vocabulary necessary for understanding. In addition, the ESL instructor will teach English grammar patterns that are unfamiliar to the student. The ESL instructor will also be available to help with content testing during the year and during EOG based on accommodations that were determined by the LEP team. The ESL instructor will treat language and content in an integrated way, and will use complex texts with support for vocabulary and grammar.

3. All ELL students will be tested annually during the WIDA ACCESS testing window, typically February through mid-March. Students who receive Level 4.0 (Expanding) or below on the ACCESS test would qualify to continue receiving ESL services. Those who test out would continue to receive ESL services only if the team deems it necessary and funding is available. Students who have become proficient in English but are struggling academically would qualify for other services offered by Excelsior, such as weekly teacher tutoring, At-Risk Tutoring Services, and the after school study group.

ESL instructor(s) will monitor the ELL student's achievement by keeping daily records of lessons taught and the students' accomplishments. Evaluations will take place during regular meetings between the ESL instructor and the classroom teacher.

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.*

1. All students will be taught a rigorous, rich curriculum at a high level. Instruction will be differentiated to help all students achieve growth. At other TeamCFA schools, including TJCA-CFA, our sister school, enrichment programs help ensure growth for intellectually gifted students. These enrichment programs include academic teams, Beta Club, chess club, Science Olympiad, Latin National Honor Society, Mu Alpha Theta (math honor society), MathCounts, Drama Club, SPICE (an enrichment activity club for Superior Performers), National Honor Society, and National Junior Honor Society. In addition, educational field trips that enhance the curriculum are encouraged, and parents and other family members who have special skills and expertise will be brought in for enrichment activities.

2. Growth and proficiency for all students, including intellectually gifted and high performing students, will be monitored as described in the student

performance standards section. NWEA reports break down performance and growth statistics into four categories:

G-P-: Below Typical Growth, Below Projected Proficiency

G+P-: Above Typical Growth, Below Projected Proficiency

G+P+: Above Typical Growth, at or Above Projected Proficiency

G-P+: Below Typical Growth, at or Above Projected Proficiency

This is helpful in monitoring and evaluating the progress and success of intellectually gifted students, who tend to be above projected proficiency.

In addition, students in grades 8-12 will take the PSAT and SAT annually, which will give valuable information about gifted students' strengths and weaknesses and what to focus on to produce growth.

### **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)*

1. The initial application form for Excelsior will have questions about the student's former educational experience, such as type of school attended, name of school, location, whether the student had an Individualized Education Plan (IEP) or Section 504 Plan, and whether the student had ever been retained and in what grade(s). The registration form filled out after the student is admitted will have questions about services the student has received in the past. The Data Manager who enrolls students in Excelsior will check these incoming forms and will notify the EC Coordinator about students who have previously been found eligible to have IEPs or 504 plans. The EC Coordinator will also review records of any new students to look for red flags. Parents will be asked to fill out release forms so that records may be requested from previous schools. It will be appropriate to have a parent meeting and an IEP or 504 plan meeting soon after enrollment to determine whether the plan is still adequately serving the student or if there need to be some modifications to meet the current needs of the student. Students coming from out-of-state will automatically be re-evaluated. Any student coming into the school with an IEP or a 504 plan will be given the appropriate services and accommodations based on the existing

or updated plan.

2.The process for identifying students who may be eligible for special education services is outlined in the Special Programs and "At-Risk" Students section. Students will not be assessed for Exceptional Children's services until the intervention process has been completed. However, parents may request that a student be evaluated. Once a student is referred, either by the Intervention Team or the parent, the referral packet will be copied and given to the psychologist, who will perform the appropriate testing and evaluation.

Excelsior will identify any other students with disabilities by participating in Project Child Find, complying with state policy NC 1501-2.9 that outlines the required process. Excelsior will distribute the state Project Child Find materials in Spanish and English by email, printed copy, and through our website, as needed. We will ensure all students with a disability receive the special education services needed and comply with all components of NC 1501-2.9. If a teacher, parent or community member makes the school aware of a concern about a student's academic progress, the child's teacher will meet with the Intervention Team to talk about the appropriate steps to take for that student. If a student is eligible for an IEP after completing the intervention process, the EC teacher and the Intervention Team will use the proper documentation from NCDPI's Exceptional Children Department to complete the IEP process. The parents will be invited to all EC meetings and the EC paperwork will be completed and signed as required by law.

3.When a student is identified as having a pre-existing IEP or 504 Plan, we will ask for a signed Records Release Form from the parent/legal guardian so that all pertinent records may be requested from the previous school. If materials are faxed from the previous school, the EC teacher will make certain that it is done while the EC teacher is waiting by the fax machine. Any IEPs or 504 plans will be shared only with staff that are required to have knowledge of the student's disabilities such as the classroom teacher and school administration. All IEPs and 504 plans will be locked in a secure cabinet or desk at all times when not in use by the appropriate staff. When the room in which the files are kept is vacant, the door will be shut and locked. If a parent of an EC student wishes to view a child's records, the school will provide the parent the opportunity to review the records with school personnel present. If any files or records need to be disposed of, they will be shredded. The EC coordinator will train all staff on compliance with confidentiality rules.

#### 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.*

1. Within each student's Individualized Educational Plan (IEP) and the Individuals with Disabilities Education Act (IDEA), Section 504 of the

Rehabilitation Act of 1973, and other civil rights enforced by the U.S. Department of Education Office of Civil Rights (OCR), Excelsior will educate students with disabilities in the least restrictive environment with their non-disabled peers. The school will provide all accommodations and special education services for any Exceptional Child based on the child's IEP. We will have an EC room to allow pull-out time by highly qualified, certified EC teachers and any EC assistants and support staff.

2. As Excelsior prepares to open, our EC staff will review the records of all incoming students with Individualized Education Plans (IEPs) to be sure that the school is compliant in following their current IEPs, holding IEP meetings with parents, and doing reevaluations. Excelsior will ensure that all necessary special education services are provided according to each student's IEP and in conjunction with the school's regular education program. Decisions are made by the student's IEP team as to what will best serve that student's individual needs. The certified EC Coordinator will train other teachers in the intervention process and identifying and referring students for evaluation. Procedures will be put in place for Regular Education teachers to refer students to the Intervention Team. The team will decide if the student needs to be referred for further evaluation to see if EC services are needed.

The school's use of NWEA Measures of Academic Progress as an assessment tool to identify individual student strengths and needs will help school personnel identify at-risk and/or gifted and talented students. Teachers will individualize instruction to meet the needs of all students. With the help of the EC Coordinator, classroom teachers will design classrooms that will meet the needs of both General Education and Exceptional students.

3. Excelsior Classical Academy's administrators and EC staff will see that all Exceptional Children's IEPs are fully implemented in accordance with IDEA and are reviewed annually. They will put procedures and practices in place to ensure that the confidentiality of all information regarding children with disabilities as required by the Family Educational Rights and Privacy Act (FERPA) is maintained. The EC Coordinator will see that all providers of services to EC students at the school have access to these records and are providing the required services. Additionally, Excelsior will ensure that exceptional children and their parents are guaranteed procedural safeguards as required by law. These will include access to records, notice, the opportunity for mediation of disputes, and the right to a due process hearing.

The IEP of each individual student will be monitored by the people who are providing the services to that student. The EC teacher will keep documentation of the progress of the individual toward the IEP goals. There will be an Annual Review of the IEP. Students and parents will be given a quarterly report on the progress made toward the IEP goals. The EC staff will communicate with the Regular Education teacher as needed to see how the student is performing in the classroom and in other academic settings.

4. Our intention is to hire two EC-certified teachers initially, one of whom will act as EC Coordinator. As our Exceptional Children student numbers increase, we will add more EC personnel, such as teacher's assistants and more EC teachers. Any related services specified in the student's IEP will



be provided. Depending on our EC student numbers and areas of disability, we will contract for Speech, Occupational Therapy, and Physical Therapy services. We also have two local licensed psychologists who have agreed to provide testing and evaluation of potential EC students pro bono at least in our first year.

### **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.*

1. Excelsior is committed to meeting or exceeding Common Core State Standards and the NC Accountability Model standards, and we expect our students to exceed the growth and proficiency levels of both the district and the state. We will have high academic expectations for all students. We will expect effort and improvement from all students, and will provide them with necessary support to achieve this.

2. Excelsior will use the Brigance Early Childhood Assessment, which identifies the skills students need in order to be successful in school and helps teachers assess a student's strengths and needs. The assessment helps identify the student's present level of performance, set goals, and monitor their progress. The domains used in this assessment align with early learning standards to comply with IDEA. Excelsior will also use mCLASS DIBELS (Dynamic Indicators of Basic Early Literacy Skills). DIBELS comprises six measures of the essential skills that every child must master to become a proficient reader. The DIBELS measures are used to regularly monitor the development of early literacy and early reading skills. DIBELS was designed for use in identifying children experiencing difficulty in the acquisition of basic early literacy skills, in order to provide support early and prevent the occurrence of later reading difficulties. Many case studies show that this assessment is a good indicator of student performance on future standardized tests, such as the SAT, and also helps increase the number of students performing at grade level.

In grades K-2, Excelsior will use a benchmark system of direct, performance-based assessments, such as "Identify these shapes," "Count from 1 to 30," and "Read these sight words." Every attempt will be made to catch problems early and intervene. Teachers for grades 3 through 8 will develop interim Core Knowledge assessments for in-class use that are uniformly rigorous within grade levels, so that students will be used to taking rigorous tests and teachers will have an accurate assessment of all students across a grade. Grade team teachers will analyze the data from these assessments and make adjustments to instruction as necessary.

Excelsior will use tests such as NWEA MAP in grades K-9 to monitor student growth and achievement. MAP tests are nationally-normed, adaptive tests that give aggregated data about proficiency. This allows teachers to differentiate instruction and plan intervention strategies.

Excelsior will give the PSAT each fall to track growth in grades 8-11. One advantage to this is that the College Board provides a Summary of Answers and Skills (SOAS) that includes a skill analysis and a question analysis to help students and teachers target areas of weakness. Also, the PSAT given in the fall of the junior year is the National Merit Scholarship Qualifying Test, which can help students who qualify obtain scholarships. PSAT scores are good predictors of SAT scores, and using the SOAS as a diagnostic tool will help student score well on the SAT. Excelsior will give the SAT to all students the fall of their senior year, as does TJCA-CFA.

3. Promotion decisions in grades K-8 will be based on a combination of factors including classroom performance and performance on assessments. Decisions regarding retention will be made by a team consisting of teachers, parents, the School Director and other appropriate participants if needed. Promotion decisions for EC students will include IEP goals being met, and all interventions and accommodations will be applied.

4. Excelsior will give all state-mandated Final Exams. The NC Final Exam results will count as 20 percent of a student's final grade in each high school course for which a Final Exam is available. In addition, Excelsior students must successfully complete, with a passing grade in each, all Future-Ready Core course requirements, plus Art History, Logic, Rhetoric, a Senior Thesis project, and three years of a language.

### **Student Conduct:**

*Provide a brief narrative that disseminates how student conduct will be governed at the proposed charter school and how this plan **aligns** with the overall mission and proposed Education Plan of the charter school.*

*Provide a draft copy of the student handbook specific to the proposed charter school within the appendices (Appendix D).*

*Be sure to include:*

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

Excelsior will focus on character and virtue in its day-to-day operations. Grammar school students will recite the school creed weekly, and virtues will be displayed, modeled, and explicitly taught. Teachers will train students in expected behaviors for each activity, such as traveling in the hallway or playing at recess, and reminders will be posted in appropriate places. Upper school students will sign and abide by the school's honor code. Teachers will receive training in classroom management and positive

discipline. Every effort will be made to use restorative practices rather than punitive, and care will be taken to make certain discipline is applied fairly and equitably.

While we will use suspension and expulsion as sparingly as possible, there are some situations which affect the safety of students or the effectiveness of the learning environment that warrant such measures. The following behaviors may result in a student being suspended or expelled as allowed by North Carolina Law:

- Causing serious injury to another person
- Possession, use of, sale of, or furnishing any firearm, knife, explosive or other dangerous substance
- Unlawful possession of, use, or sale of any controlled substance
- Robbery or extortion
- Offering, furnishing, or sale of any drug paraphernalia
- Criminal behavior
- Threats of a terrorist nature, hate crimes, or hate violence
- Sexual assault
- Battery

Excelsior will follow the laws and rules restricting number of consecutive or cumulative days of removal from educational services for students with disabilities.

In the case of a potential expulsion or long-term suspension (more than 10 days), due process will be followed. A school administrator will advise the student of the charge(s). The student will then have the opportunity to respond to the charges and present a defense. The student or the person bringing the charge may request that witnesses be interviewed by the administration. If the administrator, based on the evidence, feels that suspension or expulsion is warranted, the parent(s) will be notified the same day by telephone. The administrator will also provide a written statement of the offense(s) and the disciplinary actions taken. The statement will include information on appeal processes.

Any parent has the right to have an expulsion or suspension of more than ten days reconsidered. If the parent disagrees with the decision, he or she should submit a letter to the administrator detailing the disciplinary event as it is understood by the parent and clearly explaining the concern about the designated consequence. A discipline committee made up of 2 teachers and a board member will review the disciplinary decision. The committee will either uphold or rescind the original decision, and the parent will be notified in writing of the decision. If this decision is still unacceptable to the parent, or if the initial grievance is about the conduct of the administrator, then the grievance should be filed directly with the board of directors.

Excelsior will include information on due process rights and how to file a grievance when a student is suspended for more than ten days or expelled in the Student Handbook and on the school website. If a student is expelled from Excelsior and applies for admission to another school for acceptance, Excelsior will notify the head of the receiving school of the reasons for the pupil's expulsion.

If an administrator has personal knowledge or actual notice from school personnel that an act has occurred on school property involving assault resulting in serious personal injury, sexual assault, sexual offense, rape, kidnapping, indecent liberties with a minor, assault involving the use of a weapon, possession of a firearm in violation of the law, possession of a weapon in violation of the law, or possession of a controlled substance in violation of the law, the administrator will immediately report the act to the appropriate local law enforcement agency.

**IV. GOVERNANCE, OPERATIONS and CAPACITY**

(No more than ten total pages in this section)

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

**Governance:**

**Private Nonprofit Corporation:**

\*The nonprofit corporation must be officially authorized by the NC Secretary of State by the final approval interview date.

*Name of Private Nonprofit:* Excelsior Classical Academy CFA, Inc.

*Mailing Address:* 1213 Carolina Avenue

*City/State/Zip:* Durham NC 27705

*Street Address:* 1213 Carolina Avenue

*Phone:* 919-797-9322

*Fax:* 919-286-3986

*Name of registered agent and address:* Cynthia Gadol  
1213 Carolina Avenue  
Durham, NC 27705

**FEDERAL TAX ID:**

**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 E)  
 No

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

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

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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>
Mark-Anthony	Member at	DURHAM	Senior Pastor of

Middleton	Large		Abundant Hope Christian Church
Dr. Tom Nechyba	Member at Large	DURHAM	Prof. of Economics at Duke
Blaire Benson	Member at Large	DURHAM	Marketing and PR Professional
Kathy Rennie	Secretary/Treasurer	DURHAM	Former Fin. Officer, Former EC Teacher, Homemaker
Natalie Dekle	Vice President	DURHAM	Former Teacher, Former Admin, Homemaker
Dr. Tammy Rodman	President	DURHAM	Minister and former Business Manager
Joan Lange	TeamCFA Rep	Out of State	Schools Director for TeamCFA

**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 governing board's purpose is to provide strategic direction for the school, to choose and nurture strong school leaders, to hire a skilled and caring staff, and to ensure the school's financial and legal health. The board must be committed to the school's mission, possess substantial leadership skills and expertise, set policy that guides the school's work within the scope of its mission, and evaluate the school and itself with an eye toward continuous improvement. The board will meet regularly to set and review policy, monitor school performance, and receive reports from the school director.

The proposed school director has already been identified. Cynthia Gadol is a TeamCFA Fellow at Thomas Jefferson Classical Academy CFA and Lake Lure Classical Academy CFA. She has received training in school leadership from TeamCFA staff, other TeamCFA school directors, and the Core Knowledge Foundation. She has a BA in Statistics from the University of Georgia and is currently working on her Master of School Administration degree at Appalachian State. She was a founding teacher at TJCA-CFA and taught there twelve years. She was instrumental in developing TJCA's high school curriculum, especially in the areas of logic, rhetoric, math, and art. She has served as head of TJCA's Math and Trivium Departments, was on the School Improvement Team, and was the high school teacher representative to the TJCA board from 2010 to 2012. She is currently serving as interim Academic Dean at Lake Lure Classical Academy CFA.

She has led staff development sessions on the classical curriculum, Socratic questioning, Paideia seminars, and teaching logic and critical thinking across the curriculum. Before teaching at TJCA-CFA, she was a programmer/analyst and technical writer for Control Data Research and

Development in San Diego, ISSCO, the University of California at Santa Barbara, and the University of Georgia Computer Services.

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 Founding Board currently has seven members, one TeamCFA representative and six members from the Durham community. The current board members have experience and expertise in the areas of non-profit board service, education (including Exceptional Children), business, marketing and public relations, finance and economics, fundraising, urban concerns, and educational research.

The desired Operating Board of Directors of Excelsior Classical Academy: A Challenge Foundation Academy will have between seven and fifteen members. The Operating Board will include an additional TeamCFA representative (for a total of two), elected members, one or two non-voting members from the school's staff of teachers, and one or two ex officio members from the school's community of parents. One of the parent representatives would represent the parents of K-6, and one would represent the parents of 7-12. Likewise, one teacher would represent grades K-6 and one 7-12. Until the school has upper grades, there will be only one parent representative and one teacher representative on the board.

The board will recruit members that have board or management experience and/or expertise in areas such as education, philanthropy, business, finance, fundraising, and public relations. Board members must understand and support the mission of the school. They must be willing and able to devote the time necessary to oversee the school to make certain it is accomplishing its goals of student achievement and fiscal responsibility.

a) Pursuant to NCGS 115C-238.29E(d) the Board of Directors of Excelsior CFA shall decide all matters relating to the operation of the school including budgeting, curriculum, and operating procedures.

b) The Board will conduct an annual evaluation of the school in the areas of academics, business, and governance based on rubrics which will cover the following areas:

Governance-a majority of the board are non-related parties; board meetings are conducted regularly and in accordance with Charter/Bylaws/Articles of Incorporation/State statute; the board will require a monthly report from the school director; there is an active PTO; board will establish and monitor a multi-year Strategic Plan or Improvement Plan; the board will conduct annual School Director(s) evaluation concerning accomplishment/progress of the Strategic Plan or Improvement Plan; the board will review annual independent audit and determine that there are no negative findings; the board will conduct annual board training.

Business Practice-the board will monitor all financial transactions through a recognized, regularly audited accounting system; evidence of sufficient insurance that covers the school and directors must be submitted for review; the board will monitor the budget to make sure it provides sufficient

resources to support the school's core curriculum and mission.

Academic-the board will examine annual academic scores and reports; the board will monitor the school's progress toward becoming a Core Knowledge official school; the board will monitor NWEA MAP results to make certain the school is meeting targeted growth and proficiency; the board will examine the Professional Development Program to ensure that the school's mission and curriculum are being supported. The school director will have an annual evaluation performed by the board. The school director will work with the board to determine specific goals for the year to include student achievement, fiscal responsibility, communication, and stakeholder satisfaction.

(See evaluation rubric in Appendix T)

c)The President the Forum (Excelsior's PTO) will be an ex officio member of Excelsior's Board of directors. There will be a Forum for the grammar school and one for the upper school. The teachers will also elect representatives to the board, one from K-6 teachers and one from 7-12 teachers.

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?*

Board members, aside from Joan Lange, who sits on all founding school boards for TeamCFA Fellows, were recruited from the Durham community by the proposed director or other board members and were selected based on interest in educational choice, equity, and excellence, and for skills and connections in the community that will be helpful in overseeing the school.

Once the school opens, Joan Lange will rotate off the board and we will add two trained TeamCFA representatives, a parent representative, and a teacher representative. We will continue to seek out potential board members from the community.

Identifying potential board members will be an ongoing process so that if there is an opening, there will be a list of candidates from whom to choose to fill the position. We will establish a board development committee that examines the current board profile. With this information in mind, the committee will determine strategies to build board diversity, develop a list of board candidates, conduct orientation sessions with prospective board members, and nominate new members to the board. Except for the two TeamCFA Representatives, who will be appointed by TeamCFA, new board members will be elected by a majority vote of the existing board members. Positions can be filled upon vacancy or at the end of terms. (See our Board Manual in Appendix J for more details.)

Terms for elected members are three years long and extend from the initial July 1 to June 30 of the third year. Board members may serve three consecutive terms. If a board member is elected to fill a partial term, that board member may be elected to a full term upon completion of the partial term, and then be re-elected to serve two additional consecutive terms.

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

The board generally meets once a month. Open meeting laws will be observed.



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

Current Founding Board members are participating in the Office of Charter School's webinars on Governance. If a board member cannot attend the actual webinar, he/she visits the charter school governance Wiki site to access the archived webinar. Two of the Board Members and the Founding Director attended the training on the Application in Raleigh with Deanna Townsend-Smith. As many Founding Board members as possible will attend the TeamCFA conference this Spring in Phoenix, AZ, to receive training in Business and Finance, Governance, Facilities, and Academics. TeamCFA's attorney, an expert in educational law, will also speak to them. The board will have an annual retreat to receive training from directors and board members of TeamCFA sister schools and TeamCFA representatives.

New board members will receive a Board Manual with board bylaws, information about the school, board duties, Roberts' Rules of Order, and board policies and procedures. They will be directed to the Office of Charter Schools Governance Wiki site and will receive training at the annual retreat. They also will be invited to TeamCFA board dinners and the annual TeamCFA conferences.

Ongoing Training:

- 1) Application Training, DPI in Raleigh 9/13/2013
- 2) Office of Charter Schools Webinars
  - Board Composition and Training, 9/3/2013
  - Leading Purposeful Meetings, 10/1/2013
  - Strategic Goals and Accountability, 11/5/2013
  - Policies (Development and Oversight), 1/7/2014
  - Planning and Oversight (Academics and Finance), 2/4/2014
  - Executive and Governance Evaluation, 3/4/2014
- 3) TeamCFA Conference, 6/25-29/2014
  - Governance
  - Business and Finance
  - Academics
  - Legal
  - Facilities
  - Marketing
  - Technology
- 4) Board Retreat, July 2014
- 5) Current and new board members will attend Office of Charter Schools webinars during the training year and will view the ones they have to miss on the Wiki. As many as possible will attend Office of Charter Schools face-to-face training sessions in Raleigh.
- 6) TeamCFA Conference, June 2015

7) Board Retreat, July 2015

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.*

All board members will sign a Conflict of Interest statement declaring any possible conflicts of interest (included in Appendices H and J). Board members such as parent and teacher representatives and TeamCFA representatives do have conflicts of interest when certain matters come before the board, and they will recuse themselves from voting on those matters. Any board member who has any conflict of interest will abide by Article 5.7 from the Bylaws (in Appendix H and J) and the Conflict of Interest Policy (included in Appendix J).

ARTICLE 5.7 Conflict of Interest. If a matter comes before the Board which places a Director in a conflict of interest between the interests of the Corporation and the interest of the Director, or the Director's family or business, the Director with the conflict shall be prohibited from discussing or voting on the particular matter. In addition, the Corporation shall comply with the voting and disclosure provisions of the Director Conflict of Interest section of the Non-Profit Corporation Law NCGS 55A-8-31.

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

Committees will be formed by the board to bring policy recommendations to the board. Committees may contain members that are not members of the board of directors, but must be chaired by board members. Standing committees are listed below. Ad hoc committees may be formed from time to time.

Academic  
Board Development  
Budget & Finance  
Facility  
Fundraising  
Grievance  
Personnel  
Public relations & Marketing

Board members will take suggestions from the Administration, the Forum, or the School Improvement Team, but any ultimate decision lies with the board.

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 Forum (our PTO) and the School Improvement Team (SIT) are both groups that have the ability to make suggestions to the board in their monthly reports, and if action is needed, the board chair can refer the suggestion to the appropriate committee to research and bring before the board as an agenda item.

The Forum is a Parent-Teacher Organization that provides a forum for communication among Parents, Teachers, and Administrators and makes suggestions to the Board.

The School Improvement Team consists of the School Director and members of the Administration, Faculty, and Parents of Students enrolled in the school.

Its purpose is to examine the school's current state and climate, to reach consensus on priorities for action, and to identify implementation goals and strategies. The SIT advises the Administration and the Board.

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

The board has a Grievance Committee to handle grievances from parents and staff members. The Grievance Committee makes recommendations to the Board after investigating grievances filed in accordance with Policies and Procedures, 2.02. (Appendix J)

If a parent has a concern about a teacher, something in curriculum, a disciplinary decision, or some other matter, that parent should go through proper protocol in resolving the complaint, as address in Policies and Procedures, 2.01. (Appendix J)

If a parent has a grievance about an expulsion or long-term suspension, the grievance must be filed in writing, following procedures outlined in the Student Handbook. (Appendix D)

**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 F)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).
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 H).
4. A copy of the articles of incorporation, if available. If not available, this document must be available prior to interview by SBE, the applicant must demonstrate that it has been applied for prior to submission of the proposed application. (Appendix I)
5. Copy of any board policies if adopted already (Appendix J).
6. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).

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

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

**X Not Applicable**

**Private School Conversions: complete ONLY if the proposed charter is a private school conversion.**

*Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

**X Not Applicable**

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

**X Not Applicable**

## **Projected Staff:**

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

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

Include the following information for the proposed charter school:

Excelsior will recruit aggressively by advertising in newspapers and journals and at a variety of competitive public and private colleges and at job fairs. The board will seek out teachers who are enthusiastic about the curriculum and believe in the ability of all students, regardless of background, to learn and achieve academically given the right knowledge and support. We will strive to have a good balance of career teachers and beginning teachers.

Excelsior's board will as far as possible offer competitive salaries and benefits. The work environment at Excelsior will be inviting to teachers. The school will be relatively small and teachers will have many opportunities to collaborate with other teachers at Excelsior and other TeamCFA schools. They will have resources available on the TeamCFA website to meet other teachers and attend workshops. Teachers will be valued as professionals and will be encouraged to participate in leadership of the school. Teachers will be provided the professional development they need to implement the curriculum, manage their classrooms, and use technology successfully.

While K-8 teachers will implement the Core Knowledge curriculum and will use methods to encourage critical thinking, they will have freedom to use best practices and innovations in pedagogy. Their teaching will not be scripted. Teachers who teach the Core Knowledge Sequence generally report higher satisfaction.

Beginning teachers in their period of induction will be supplied with mentors and given support according to our beginning teacher support plan. They will have regular supportive communication with the administration.

We will work to engage parents and will make certain to promote positive student behavior and deal with problems. We will focus on high student achievement.

All of these practices have been shown to help with teacher satisfaction and retention.

- 2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board. Provide as Appendix L, a draft of the employment policies to be implemented by the proposed charter school.*

Employment at Excelsior Classical Academy CFA will be at-will. Employees will be recruited and interviewed by the school's administration. In the first year, at least, members of the board will be involved in the interview process as well. The board must approve all contracts for employees and is

the employer of the school director and the rest of the staff. However, the board will not manage the school's day-to-day functions. The board will provide policy and oversight of the school.

A draft of the Employee Handbook is included in Appendix N.

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

Excelsior Classical Academy CFA will obtain a criminal record history check on all new employees from the State Bureau of Investigation ("SBI") or from other qualified source(s) such as Praesidium Inc., The Chapman Corp., or The Background Corp. prior to their initial employment.

Any misrepresentations, falsifications, or material omissions in any information or data in an application may result in the exclusion of an applicant from further consideration for employment by Excelsior Classical Academy or, if the person has been hired, termination of employment. Employment references of all applicants will be checked.

For organizations or school positions where proof of graduation from a college or university is necessary, employees will be required to provide documents supporting their degree prior to or upon employment with Excelsior Classical Academy. Additionally, the majority of teaching positions will require documentation to support either a Statement of Eligibility or Certification in the state of North Carolina. All teachers must be designated highly qualified.

It is the responsibility of the individual employee to achieve and maintain re-certification and/or renewal of licenses as appropriate and to provide copies of such documentation to Excelsior Classical Academy. Failure to maintain a current teaching license may result in termination of employment.

Excelsior Classical Academy may terminate the employment relationship at will at any time, with or without notice or cause, as long as there is no violation of applicable Federal or State Law.

Excelsior Classical Academy will not discriminate in employment opportunities, advancement opportunities, or practices on the basis of race, color, religion, gender, national origin, age, disability, or any other characteristic protected by law. This policy governs all aspects of employment, including selection, job assignment, compensation, discipline, termination, and access to benefits and training.

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

We will use the state salary ranges as a general guideline for administrators, teachers, and teacher assistants. We will endeavor to pay competitive and fair salaries and wages for all employees.

School Director: \$52,000-65,000  
Academic Dean: \$35,000-45,000  
Dean of Students: \$35,000-45,000  
Business/HR Manager: \$35,000-45,000  
Administrative Assistant: \$20,000-32,000

Core Content Teacher: \$31,000-59,000  
Elective/Specialty Teacher: \$31,000-59,000  
Teacher Assistant: \$20,000-29,000  
EC Teacher: \$34,000-62,000  
School Counselor: \$38,000-50,000  
Transportation: \$17,000-21,000  
Food Service Manager: \$20,000-29,000  
Food Service Employee: \$17,000-21,000

Excelsior will provide workman's compensation, as included in our liability policy. We will provide health benefits and will match up to 6% contributions for retirement for all full-time employees.

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

Excelsior Classical Academy-CFA may terminate the employment relationship at will at any time, with or without cause, so long as there is no violation of applicable Federal or State law. An employee has the right to notice of the reason for termination and to a hearing with the School Director. An employee has the right to appeal the termination to the Board of Directors.

Any Excelsior employee with a concern that needs to be addressed should attempt to resolve the issue following the appropriate Chain of Responsibility, as laid out in 2.01 Problem Resolution Policy. (See Board Manual Policies and Procedures in Appendix J.)

If satisfactory resolution does not occur within those steps, then the concern may be brought as a written, signed grievance to the Board of Directors through the Grievance Committee. (See 2.02 Grievance Policy in the Board Manual Policies and Procedures in Appendix J.)

No employee shall be discharged or otherwise discriminated against with respect to such employee's compensation, terms, conditions, or privileges of employment because the employee reported any violation of law, school rules or policy, filed any grievance or complaint against any other employee, caused any grievance procedure to be initiated against any employee, testified or otherwise gave or provided evidence in any grievance procedure or proceeding, assisted or participated in any grievance procedure or proceeding, or complained about any violation of law, school rules, or policy.

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

Almost every charter school employee has multiple responsibilities within the organization. Teachers, assistants, and coaches may have bus licenses and drive buses. Money for stipends for bus-driving has been included in the budget. Teachers may be department chairs, grade team leaders, coaches, or mentors. Teachers may participate in break activities and camps. In the future, we will budget stipends for these positions as well.

*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.*

We plan to have two full-time EC-certified teachers the first year. This may be adjusted depending on our EC numbers. We will contract for services such as Speech and ELL. If we have a large ELL population, we will adjust the staff and budget for that by including a half- to full-time paraprofessional to work with ELL students.

Excelsior offers a rich and rigorous curriculum. Gifted students will be mainstreamed, but teaching will be differentiated to allow gifted students to grow and be challenged academically. Enrichment will be provided in the regular classroom and in extracurricular activities.

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

School Director:

Responsibilities include board reports, budget planning, instructional leadership, evaluating teaching staff, discipline, and community outreach. At least five years of teaching experience and/or some form of leadership or management experience/training are desirable. A strong candidate has a Master's Degree in School Administration or Business and/or experience in leadership/management. A school administrator's license or ability to apply is preferred.

Academic Dean/Curriculum Coordinator:

Responsibilities include beginning teacher support, teacher licensure, curriculum coordination, and assisting the Director with character education, evaluation of teachers, especially in instructional strategies specific to our mission and curriculum, and discipline. Bachelor's degree or higher required, with teaching experience and teacher licensure are preferred. Strong organizational skills needed.

Dean of Students (after year 1):

Responsibilities include handling discipline referrals, parent conferences, manage character education, work with teachers on classroom management. Bachelor's degree or higher required, with teaching experience and teacher licensure preferred. Calm, respectful, capable demeanor needed.

Business/HR Manager:

Maintains school business and human resources records, accurately maintains financial records, provides information for auditors, keeps abreast of policies and regulations, recruits and trains tutors and volunteers, requests background checks for any board members who handle money, employees, and volunteers, and works with all contractors. Bachelor's degree or appropriate experience required. General computer skills and knowledge of Excel and other office/business programs.

Data Manager/Administrative Assistant:

Answers the phone, greets visitors, maintains attendance/late arrival/early departure records, student information management, and general office duties. High school diploma or equivalent. Basic computer skills. Demonstrated dependability. Clerical or customer service experience a plus.

Clerical/Administrative Assistant (after year 1):

Clerical duties, answers phones, greets visitors, checks students in/out, maintains attendance/late arrival/early departure records, general office duties. High school diploma or equivalent. Basic computer skills. Demonstrated dependability. Clerical or customer service experience a plus.

K-8 Teachers:

Responsible to implement the Core Knowledge curriculum for their grades and teach students to mastery. Grade teams will plan together, and specialty teachers will collaborate with grade teams. Teachers must work with EC staff to ensure compliance in services and accommodations. Classroom teachers need to be licensed or eligible for licensure in elementary education. Licensure preferred for specialty teachers as well. All must be highly qualified in the areas in which they teach. Strong communication skills needed.

High School Teachers:

Bachelor's degree or higher. Must be highly qualified in teaching area. Preferably hold appropriate teaching license or are eligible to apply. Collaborate with grade teams and subject departments. Must work with EC staff to ensure compliance in services and accommodations. Strong communication skills needed.

Teacher Assistants:

Assist teachers with instructional duties. Strong communication skills needed. Two year degree or equivalent hours of course work required. Experience working with children preferred.

EC Teachers:

Work with exceptional children, collaborate with regular education teachers, and provide training in EC practices. EC coordinator will, in addition, oversee services for exceptional children, manage records. Must be licensed or eligible for licensure in Exceptional Children and must be highly qualified. Experience preferred.

School Counselor:

Provide individual and group counseling, college and career exploration, and help with student schedules.

License in school counseling required. (In the first two years, we will not have a school counselor on staff. Two licensed psychologists in the area have agreed to provide pro bono services and will help us if the need for counseling arises at school during that time.)

Bus Drivers:

Drive morning and afternoon routes, field trips, and for other school activities. (Extra routes will get pay from pass-through field-trip or activity fees.) Class D license required; bus driving experience preferred. One will be the Transportation Coordinator, at an extra .25 time.

Food Service Manager:

Manage any food service employees, order food and supplies, keep track of food service budget. Prepare lunches. Management skills necessary. Human resource skills important. Food service experience a plus. Must be certified by ServeSafe.

Food Service Staff:

Prepare lunches, following health department regulations and nutrition guidelines. Demonstrated dependability.

**Staff Evaluation and Professional Development**

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

The School Director and the Academic Dean/Curriculum Coordinator will be responsible for overseeing teacher licensure requirements and professional development. The Business/HR Manager will keep pertinent licensure records such as CEUs.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

The Academic Dean/Curriculum Coordinator (AD) supervises curriculum implementation, monitors student progress, keeps abreast of the law pertaining to beginning teacher support, offers guidance on teaching materials, and coordinates professional development activities for the teachers. The Business/HR Manager is responsible for verifying eligibility for licensure, maintaining records that verify eligibility, and submitting



paperwork required to DPI each spring to ensure licenses are kept current. It is the responsibility of each teacher to turn in documentation of CEUs or other requirements for licensure to the HR Manager.

ECA holds staff development sessions during the last week or two prior to the start of school. New teachers, whether beginning teachers (BTs) or not, will receive orientation on policies, procedures, and resources. Mentor and BT training during this time will include a review of the NC Teacher Evaluation Handbook. All teachers will be trained in licensing procedures, state evaluation standards and requirements, and the in-house and state-selected evaluation tools. In-house evaluation tools are designed to evaluate instructional practices specific to our philosophy and mission, as mentioned in our Education Plan.

We will select mentors who are standard II licensed teachers, and we will assign mentors in the same academic area as the beginning teacher whenever possible. As the school grows, we hope to be able to provide stipends for mentors.

Teachers are assigned according to their areas of expertise and licensure. At charter schools, teachers' workloads tend to be heavy, but every attempt will be made to limit the number of preparations and challenging students a beginning teacher has. Teachers are hired to be academic facilitators first and foremost. Any extracurricular duties will be assigned only when the BT makes the request to do so in writing.

The School Director (SD) will work closely with mentors and the AD/CC to ensure support of BTs is thorough and comprehensive. The SD will provide timely feedback after evaluations of BTs. The SD will ensure that the four evaluations for BTs are spread out across the four academic quarters of the school year. Evaluations will be performed by administrators. Mentors may perform off-the-record summative assessments-as-learning, and teachers are encouraged to observe each others' classes to learn and share best practices. Annual summative evaluations by administrators are completed prior to the June 30 deadline, with the goal of completing these before adjournment of the teaching staff in June.

Training on Professional Development Plans (PDPs) takes place during the PD sessions before school starts. The mentor teachers meet with BTs at least monthly throughout the school year to ensure that the PDP is updated and followed. The post-observation conferences with the School Director include a discussion and review of the PDP with the BT and mentor.

Beginning Teachers at Excelsior have many levels of support throughout the school year. The BT is encouraged to come directly to the BT's mentor, the Director, or the AD/CC when a need arises. An additional resource is the grade team leader who is accessible to address day-to-day needs and questions that the BT may have. When the school has upper grades, department chairs who help facilitate vertical team planning will be available to address curricular questions and resource material needs.

Renewal activities will be planned so that teachers have the opportunity to fulfill the State Board of Education's goal of improving academic achievement. The administration approves all requested staff development

prior to the event to ensure the appropriateness and need for the activity. Available funds for staff development are used where the need is greatest. Outside approved workshops or courses may also qualify for renewal credits.

- 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.*

All teachers of grades K-8 will receive training from the Core Knowledge Foundation in Core Knowledge implementation. We will send teachers to Core Knowledge workshops using grant money from TeamCFA, and will also have in-house professional development to train and support teachers. Some of these sessions may be in partnership with other TeamCFA schools around the state. Teachers of grades 9-12 will receive in-house training to teach them about the principles behind Core Knowledge and provide a general overview of the program.

Teachers in all grades will receive in-house training about the Trivium, Dorothy Sayers' essay on The Lost Tools of Learning, Paideia seminars, and Socratic questioning. All teachers will have in-house training in classroom management and positive discipline. Teachers will watch an hour-long Webinar "Changing Mindsets, Motivating Students" and will over the course of the year read sections of Carol Dweck's book, "Mindset: The New Psychology of Success." The Webinar is \$49 for unlimited whole-school access for 6 months.

We will provide training in data-driven instruction and creating and using meaningful assessments. These sessions may be differentiated by lower (K-5) and upper (6-12) school. Training will be led by in-house experts or ones from other NC TeamCFA schools. Teachers will also receive training in differentiated instruction.

Our certified EC Coordinator will conduct a training session on EC procedures at least once a year. Teachers will receive training on healthy choices and habits and how to encourage those in their students. They will learn how to incorporate physical activity in the classroom.

We will also solicit input from teachers about desired professional development topics. We will offer both uniform and more individualized professional development. Some professional development courses will be content-related and will be attended by teachers in specific departments. Some will be grade level specific.

- 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.*

We have scheduled ten days at the beginning of the first year for orientation, training, and professional development.

Since all teachers will be new to the school the first year, all teachers will go through new teacher orientation to fill out paperwork and learn about policies and procedures (1/2 day).

We will schedule a training session on the NC Teacher Evaluation standards

and the On-line Educator Evaluation Tool. (1/2 day)

Teachers will read Dorothy Sayers' essay, "The Lost Tools of Learning," and will be introduced to Socratic questioning techniques and Paideia seminars. (1 day)

Excelsior will provide professional development for the staff specifically for implementing the Core Knowledge Curriculum. (3 days) Professionals from the Core Knowledge Foundation will come to the school site to train staff members. We will also have training in using the Singapore Math Curriculum. (2 days)

Also during this time, teachers will view the Webinar "Changing Mindsets, Motivating Students" and will reflect and discuss its implications. There will be a session in which veteran teachers talk about best practices in classroom management, and a psychologist will speak on positive discipline and behavioral interventions. (1/2 day) Teachers will learn about differentiating instruction to accommodate all students. Our EC specialist will also train classroom and specials teachers in inclusion, EC protocol, and referrals. (1 day)

The idea of collecting, analyzing, and responding to data will be introduced (2 hrs), but this will be an ongoing professional development topic. Teachers will receive copies of the book *Driven By Data* and *Annual Growth Catch-up Growth* to read and discuss in Professional Learning Communities in after-school faculty meetings throughout the year.

Teachers will receive training in incorporating physical activity into the classroom and in promoting healthy habits. They will be directed to web resources on these topics to help in lesson planning. Teachers will be encouraged to adopt healthy lifestyle habits in order to model these for the students. (2 hrs) Teachers will also learn about cross-cultural understanding, hidden biases, and having high expectations for all students. (1/2 day and ongoing)

The Academic Dean/Curriculum Coordinator will work with grade level teams at weekly meetings throughout the year to develop lessons that include character training.

5. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.

The first teacher workday before school starts will be used for new teacher orientation. New teachers will complete any necessary paperwork and will be trained in policies and procedure. New teachers will also read and discuss Dorothy Sayers' essay, "The Lost Tools of Learning" and E.D. Hirsch, Jr.'s article, "A Wealth of Words," and Robert Pondiscio's article, "How to Get a Big Vocabulary." They will watch and discuss a short video by Dan Willingham entitled "Teaching Content IS Teaching Reading." Socratic questioning and Paideia seminars will be discussed. New teachers will receive an introduction to the online evaluation system and will be given electronic copies of the North Carolina TEACHER EVALUATION PROCESS book.

To ensure a smooth start to the first year of operations, Excelsior will provide professional development for the staff specifically for implementing the Core Knowledge Curriculum. Professionals from the Core Knowledge

Foundation will come to the school site to train staff members in this first year. Teachers will also receive training in implementing Singapore Math.

In subsequent years, any new grammar school teachers will be required to be trained in these curricula and returning faculty will be offered refresher courses and chances to discuss best practices to refine their skills. These sessions will be done by in-house staff when possible.

In the first year, there will be ten days before the start of school for orientation, training, and professional development so that the new staff is brought up to speed. There will be two to four half-days set aside for professional development in the first semester and two to four half days in the second semester. There will also be two days at the end of the year for post mortem reflection, teacher surveys, and year-end housekeeping.

In a typical year, there will be five teacher work days for professional development the last full week before school starts, and two before that for new teachers. There will be four to eight half-days scheduled during the year and two full days after the last day of school. The days at the beginning of the year will be used for new teacher orientation, beginning teacher training, professional development, and technology training. Days during the year will be used for meetings of grade teams and departments and for Professional Learning Communities. The days at the end of the year will be used for reflection, going over surveys, and SIT work.

### **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.238.29F(g) (1-7) carefully.

### **Marketing Plan**

*Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflects the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).*

We understand and agree with the charter school state statute. The Board of Directors of Excelsior are/will be reaching out to students and their parents through various venues. Some of those are listed below.

- \*Word of mouth to board members' contacts, colleagues, and church members
- \*Excelsior's website
- \*Excelsior's Facebook page
- \*Excelsior's Twitter account
- \*Brochures at preschools and day cares, YMCA, churches, local stores, businesses, and offices around targeted area
- \*Advertisements in local newspapers
- \*Requests to speak at community organizations and service clubs
- \*Informational meetings at libraries, local churches, other venues

Also, TeamCFA provides marketing guidance:

#### Create School Identity

- \*School Colors
- \*School Logo bundle all versions of final logo including: full color logo, black/white, reversed out, single color and text only in a variety of file formats
- \*School Mascot
- \*Complete Brand Guidelines outlining: use of logos, Pantone color palettes, typography specs

#### Create Stationary System

- \*Letterhead
- \*Envelopes
- \*In-house memo - Word Template
- \*Business Cards

#### Brochures

- \*Tri-Fold Brochure - create
- \*FAQ brochure - create

#### Signage

- \*School Site signage as needed
- \*Banner-up portable signage - create
- \*Billboards as needed

#### Web Site: On National Level

- \*Develop/Launch
- \*Provide Staff Training
- \*Maintain/Update

#### School Website Upgrade

- \*Maintained by onsite Super User (Clerical/Administrative Assistant) with login permissions to update site
- \*School Calendar
- \*Current News Events
- \*Teacher Websites
- \*Link to entire TeamCFA network activity
- \*Streaming photos
- \*Thorough school info: mission statement, academic plan, enrollment, location, activities, contact information, extracurricular, volunteering, parent/student info and more

Supply Email Accounts for school staff: e.g., cgadol@eca.teamcfa.org

#### Supporting Materials

- \*Postcards
- \*Flyers
- \*Door hangers
- \*ConnectCFA Magazine (advertising as a member of TeamCFA)

#### Marketing Timeline:

Over the past year and a half, we have met with various groups and organizations. We have talked with faith leaders and university employees.

We have passed out brochures and flyers, set up a website, a Twitter account, and a Facebook page, and held informational meetings.

Ongoing: Update website and social media accounts at least monthly with latest information about school

December 2013-July 2015: Continue to pass out flyers and brochures and hold Informational Meetings

February-April 2014: Create marketing and parent information packets

February 2014-ongoing: Contact local churches, YMCAs, tutoring centers, and preschools to send home flyers and promotional materials with their children

October 2014-January 2015: Hold Information Sessions for parents interested in 2015 admissions; advertise application process and timing

November 2014-ongoing: Work with local parenting magazines to ensure we are added to local school listings in their education guides

April 2015-June 2015: Work with reporters at local newspapers and magazines to develop interest in the schools opening

Ongoing: Publicize school's activities and successes

October 2015-January 2016: Hold Information Sessions and Open Houses for parents interested in 2016 admissions; advertise application process and timing

On an annual basis the Board of Directors will analyze student demographic enrollment statistics and revise the marketing plan to ensure that Excelsior's marketing efforts are reaching the community in a way that allows for the most diversity in its applicant pool.

### **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.*

At Excelsior, we want parent and community involvement to be a two-way street. We do not wish to merely take help and donations from parents and the community; we want to give back to the community and assist parents in helping their children be successful. We want families to feel like partners in their children's education. The National Education Association reminds us of the popular proverb, "It takes a village to raise a child." We feel that Excelsior is part of the village. We would like to establish a climate of collaboration with parents, with neighborhoods and community, and with local institutions in order to give our students every support, resource, and opportunity to achieve academic and life success.

"Parent, family, and community involvement in education correlates with higher academic performance and school improvement. When schools, parents, families, and communities work together to support learning, students tend to earn higher grades, attend school more regularly, stay in school longer, and enroll in higher level programs.... The evidence holds true for students at both the elementary and secondary level, regardless of the parents' education, family income, or background - and the research shows parent involvement affects minority students' academic achievement across all races." (NEA policy brief on Parent, Family, Community Involvement in Education, 2008)

Excelsior will use Dr. Joyce L. Epstein's Framework of Six Types of Involvement to plan our parent and community involvement practices.

#### Type 1: Parenting

We will provide suggestions for home conditions that support learning. These include a regular place and time for homework, regular bedtimes and enough sleep, healthy eating habits and exercise, and displaying that education is valued. We will offer workshops and resources on parenting and child rearing at each age and grade level. We will work with community organizations to provide information on adult education for parents, English as a second language, and family literacy.

#### Type 2: Communicating

We will design effective means of school-to-home and home-to-school communication. We will strive to have at least one office staff person who speaks Spanish, as Spanish-speakers make up the largest English-language learner group in the area. We will identify translators for other languages parents may speak. We will have annual orientations, open houses, and conferences with parent and child. Teachers will have websites that include classroom and homework information. A monthly newsletter will be sent out via email and posted on the website, and we will offer assistance to parents who do not have internet or home computers to open email accounts at local public libraries. All school policies and programs will be posted (print copies will be available).

#### Type 3: Learning at Home

We will provide information on what skills and knowledge are needed for each grade. Copies of Core Knowledge books "What Your \_\_ Grader Needs to Know" will be available for families to check out. (Spanish-language versions are available for free download on the CK Website. We will also have printed copies available to check out.) Information on homework and policies will be available on the school website, as will suggestions for activities that help students with skills.

#### Type 4: Volunteering

Every effort will be made to give all families opportunities to participate in activities and share their skills, knowledge, and cultures, during school and outside of it.

#### Type 5: Decision Making

There will be a Parent Forum (PTO) and parent representatives on the board and School Improvement Team. Board meetings will be "open-door." We will survey parents about needs, interests, and partnering ideas.

#### Type 6: Collaborating with Community

We will provide information on community programs and services to school families, partner with community organizations, and encourage students to participate in service and learning opportunities.

## **Admissions Policy**

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

1. *Tentative dates for the open enrollment application period; enrollment deadlines and procedures. \*Please be advised schools cannot accept applications until after final approval from the SBE.*
2. *Clear policies and procedures detailing the open enrollment lottery plan including policies*

*regarding statutory permitted student enrollment preferences.*

3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
5. *Clear policies and procedures for student withdraws and transfers.*

Excelsior Classical Academy CFA will seek a population that reflects the diversity of the community. Any student domiciled in North Carolina is eligible to apply, including homeless students and students whose parents are stationed overseas if the student lives in North Carolina and proof of deployment and active duty can be provided. There will be no academic entry requirements; however, a student transferring after ninth grade will be placed in appropriate classes after examination of the student's transcript to ensure that all of Excelsior's graduation requirements can be met. There will be no pre-admission activities.

The application period will begin January 1. Deadline for application will be March 17. Each prospective student must complete an application to be considered for enrollment. During each period of enrollment, Excelsior will admit any eligible student who submits a timely application, unless the number of applications exceeds the capacity of the school. (We reserve the right to refuse admission to a student who has been expelled or suspended from a public school until the period of suspension or expulsion has expired.) A lottery will be held if more students apply than we can accommodate. The lottery will take place in a public forum no later than two weeks after the application deadline. Notices of the lottery will be posted, published, and advertised at the end of the enrollment period. No applicant is required to be present at the lottery to receive a spot. After all open spots are filled, students will be placed on waiting lists by grade in the order the names are drawn. Students who are admitted or are in the first 20 wait-list spots per grade will be notified by email, phone, or mail. If admitted or enrolled students give up their places, names will be selected in order from the waiting list to fill the vacancies. Families should accept or decline admittance in writing within five business days of notification. Families will be asked to provide further information about their child as well as sign a records release form if they accept the seat.

Pursuant to state statute 115C238.29F, Excelsior will give priority enrollment to children of the school's principal, teachers, and teacher assistants. Siblings of students enrolled and attending the previous year will also be given priority for enrollment. If multiple-birth siblings apply and a lottery is needed, one surname will be entered into the lottery to represent all of the multiple-birth siblings. If that surname is selected, all of the multiple-birth siblings will be admitted. In the first year, board member's children are entitled to enrollment priority, limited to the lesser of 10% of the school's total enrollment or 20 students.

Currently enrolled students at Excelsior should complete a Letter of Intent by January 21st each year indicating whether or not they intend to return. Returning students do not have to submit a new application or go through the lottery process. Students who withdraw before the last day of the current school year must reapply for admission and will follow the procedures outlined above for new students.

Students may withdraw or transfer at any time with written notice from



parent or guardian. However, if the parent or guardian does not give notice and another school sends a written request for records transfer signed by the parent or guardian, this will serve as written notice.

To transfer or withdraw from Excelsior, the following steps will need to be followed:

1. The student and parent shall sign an official Withdrawal Form
2. Library and course books checked out to the student will be collected
3. Copies of most current report card, transcript, interim reports, signed withdrawal form, and attendance summaries will be given to the student in an enclosed envelope with a seal
4. Withdrawal Form will be completed by teachers for most up-to-date current 9 week grade

**PROJECTED ENROLLMENT 2015-16 through 2019-2020**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Durham Public Schools
- LEA #2 Granville County Schools
- LEA #3 Person County Schools

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

	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	LEA 320	LEA 390	LEA 730	LEA 320	LEA 390	LEA 730	LEA 320	LEA 390	LEA 730	LEA 320	LEA 390	LEA 730	LEA 320	LEA 390	LEA 730
Kindergarten	48	1	1	48	1	1	48	1	1	48	1	1	48	1	1
Grade 01	48	1	1	48	1	1	48	1	1	48	1	1	48	1	1
Grade 02	48	1	1	48	1	1	48	1	1	48	1	1	48	1	1
Grade 03	48	1	1	48	1	1	48	1	1	48	1	1	48	1	1
Grade 04	48	1	1	48	1	1	48	1	1	48	1	1	48	1	1
Grade 05	0	0	0	48	1	1	48	1	1	48	1	1	48	1	1
Grade 06	0	0	0	0	0	0	48	1	1	48	1	1	48	1	1
Grade 07	0	0	0	0	0	0	0	0	0	48	1	1	48	1	1
Grade 08	0	0	0	0	0	0	0	0	0	0	0	0	48	1	1
	240	5	5	288	6	6	336	7	7	384	8	8	432	9	9
	250			300			350			400			450		

### **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.*

We are attempting to locate in an area that is central to several residential neighborhoods and has many office buildings, restaurants, and stores where parents might work, which will hopefully decrease the number of students who need bus transportation. Because of the uncertainty involved in procuring a building, it is hard to predict at this time how many buses will be needed to transport students to and from campus. At this time, Excelsior Classical Academy plans to utilize four buses which will pick up students at assigned locations. Pick-up locations will be determined based on student enrollment and family need.

We have budgeted for five buses at first in order to have an extra bus in case a bus breaks down. We have budgeted for four half-time bus drivers who may also be teachers or teacher's assistants. In addition, we have allotted for another quarter-time Transportation Coordinator who will most likely be one of the bus drivers.

A transportation survey will be included in the enrollment packet to assess the need for transportation. Excelsior will reassess the number of buses and pickup locations every year to make certain we are best serving our students. For the first year, we are budgeting about \$10,000 per bus, plus money for gas and maintenance. (We have budgeted to buy five buses, as one could break down and we might need a spare.)

Excelsior's administrative staff will also work with parents who would like to carpool to facilitate organization. As the school grows to serve middle and high school grades, Excelsior will consider offering students public bus passes to provide an alternate mode of transportation, as our desired location is on a city bus route.

Excelsior Classical Academy will not deny access to any local area student due to a lack of transportation.

### **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.*

At least in our early years, we will not have a hot lunch program. One of the facilities we are considering does have a lunchroom with a small kitchen, but if we use modular classroom units, we will not have one. Because of this uncertainty, we plan not to have a hot lunch program, but rather to have students bring their lunches. However, we are committed to making sure no child goes hungry.

Our goal is to make it not readily apparent who is receiving a free lunch.

We will solicit donations of lunch boxes and bags from parents, the community, and local stores so that these can be used for students who cannot afford to bring lunch. We can also use paper lunch bags if we do not get enough donated containers. We will personalize the lunch containers for children who are receiving free lunch and place the filled containers in children's cubicles in the mornings before homeroom. We plan to have the lunch program manager and employees or volunteers prepare simple but nutritious lunches similar to those that might be brought from home. A lunch might consist of a sandwich on whole grain bread, fruit or vegetables, and a drink. When we have older students who have lockers, not cubicles, we may have them pick up their lunches as they come in to school.

Families who wish to apply for free lunch for their children will fill out the eligibility form included in their enrollment packet. (We will include a form about food allergies and preferences, as well.) Determination about eligibility will be made using guidelines similar to the federal free and reduced price programs income eligibility guidelines. We have planned and budgeted to serve at least 50% of our students free lunches.

We will have our lunch program manager attend a ServSafe course, and we will have the Health Department inspect the area where the food is prepared before school opens so that any problems may be remedied. As we will not be cooking, only one inspection per year is needed.

**Civil Liability and Insurance (GS 115C-238.29F(c)):**

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$4,791.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$2,387.00
Property Insurance	\$350,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$5,750.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$6,825.00
Total Cost			\$20,535.00

\*The applicant must provide a quote from an insurance provider as part of this application (as Appendix O) 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 § 115C238.29F (a).

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.

excelsior2015                  11/09/2013

(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. If a facility has been identified please fill out the Facility Form (Appendix N).*

The Board of Excelsior has been researching possible facilities in the target area. It is difficult to obtain a building more than a year in advance and without having already received a charter, but we have identified facilities that meet our requirements for buildings, parking, grounds, and location. In the area of interest, we have found two likely candidates. They are empty buildings that have lease rates of \$15.50 per square foot, which includes utilities, water, maintenance and janitorial service, and landscape service.

Another possibility is leasing mobile classroom units from ModSpace (or another vendor) to place on the land that is owned by Abundant Hope Christian Church, whose pastor is on our board. There would be no charge for the use of the land. The number and size of mobile classroom units would be determined by student enrollment. A ten-plex from ModSpace, which would house six classrooms, bathrooms, and office space, leases for \$3,000 per month. There is a one-time set-up and delivery charge of \$60,000. The cost would be \$60,000 + \$6,000 for two ten-plexes for the first month, and the lease for each subsequent month would be \$6,000. If we go with this option, we would then have to pay for utilities and water, some form of janitorial service, and various other expenses.

Excelsior plans to provide 100 square feet per student in the first year. We will ensure that there is one classroom for each section of each grade. Space will be provided for pullouts for Exceptional Children. Excelsior will ensure that any facility use meets state and federal guidelines and is ADA compliant.

**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.*

If our facility cannot be ready by the opening date, Excelsior's contingency plan is to lease classroom space temporarily from a large church in the same general area until the facility is ready. There are two large churches in the immediate vicinity, one of which even has a family center with a gym. They each currently have enough space available, but there is no guarantee that they will still have that in a year in a half. However, there are a number of other large churches which we can fall back on in the area.

## V. FINANCIAL PLAN

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

### **Budget: Revenue Projections from each LEA 2015-16**

<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 #1 320 - Durham Public Schools</p>			
	<b>Revenue</b>	<b>2013-2014 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2015-2016</b>
	State Funds	\$4,770.36	240	\$1,144,886.40
	Local Funds	\$3,165.50	240	\$759,720.00
	Federal EC Funds	\$3,743.48	33	\$123,534.84
	<b>Totals</b>			\$2,028,141.24
	<p>LEA #2 390 - Granville County Schools</p>			
	<b>Revenue</b>	<b>2013-2014 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2015-2016</b>
	State Funds	\$5,135.90	5	\$25,679.50
Local Funds	\$1,458.30	5	\$7,291.50	
Federal EC Funds	\$3,743.48	1	\$3,743.48	
<b>Totals</b>			\$36,714.48	
<p>LEA #3 730 - Person County Schools</p>				
<b>Revenue</b>	<b>2013-2014 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2015-2016</b>	
State Funds	\$4,959.40	5	\$24,797.00	
Local Funds	\$1,582.75	5	\$7,913.75	
Federal EC Funds	\$3,743.48	1	\$3,743.48	
<b>Totals</b>			\$36,454.23	

**Total Budget: Revenue Projections 2015-16 through 2019-2020**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
-State ADM Funds	\$1,195,363	\$1,434,435	\$1,673,508	\$1,912,581	\$2,151,653
-Local Per Pupil Funds	\$774,925	\$929,910	\$1,084,895	\$1,239,880	\$1,394,865
-Exceptional Children & Federal Funds	\$131,022	\$153,857	\$179,500	\$205,143	\$230,786
-Other Funds*	\$100,000	\$100,000	\$100,000	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$2,201,310</b>	<b>\$2,618,202</b>	<b>\$3,037,903</b>	<b>\$3,357,604</b>	<b>\$3,777,304</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 R.**



**Personnel Budget: Expenditure Projections 2015-16 through 2019-2020**

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 (Appendix M).

BUDGET EXPENDITURE PROJECTIONS Personnel	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
School Director	1	\$56,000	\$56,000	1	\$56,000	\$56,000	1	\$56,000	\$56,000	1	\$56,000	\$56,000	1	\$56,000	\$56,000
Academic Dean/Curriculum Coordinator	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000
Dean Of Students	0	\$0	\$0	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000
School Counselor	0	\$0	\$0	0	\$0	\$0	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000
Business/H.R. Manager	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000	1	\$37,000	\$37,000
Data Manager/Administrative Assistant	1	\$27,000	\$27,000	1	\$27,000	\$27,000	1	\$27,000	\$27,000	1	\$27,000	\$27,000	1	\$27,000	\$27,000
Clerical/Administrative Assistant	0	\$0	\$0	1	\$23,500	\$23,500	1	\$23,500	\$23,500	1	\$23,500	\$23,500	2	\$23,500	\$47,000
Transportation Staff	2.25	\$18,000	\$40,500	2.25	\$18,000	\$40,500	2.75	\$18,000	\$49,500	2.75	\$18,000	\$49,500	3.25	\$18,000	\$58,500
Food Service Manager	.5	\$22,000	\$11,000	.5	\$22,000	\$11,000	.5	\$22,000	\$11,000	.5	\$22,000	\$11,000	.5	\$22,000	\$11,000
Food Service Staff	0	\$0	\$0	0	\$0	\$0	.5	\$18,000	\$9,000	.5	\$18,000	\$9,000	1	\$18,000	\$18,000
A - Total Admin and Support:	6.75	\$197,000	\$208,500	8.75	\$257,500	\$269,000	10.75	\$315,500	\$327,000	10.75	\$315,500	\$327,000	12.75	\$315,500	\$368,500
Instructional Personnel:															
Core Content Teacher(s)	10	\$37,000	\$370,000	12	\$37,000	\$444,000	14	\$37,000	\$518,000	16	\$37,000	\$592,000	18	\$37,000	\$666,000
Electives/Specialty Teacher(s)	3	\$36,000	\$108,000	3	\$36,000	\$108,000	4.5	\$36,000	\$162,000	6	\$36,000	\$216,000	7.5	\$36,000	\$270,000
Exceptional Children Teacher(s)	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000	1	\$40,000	\$40,000
Exceptional Children Coordinator	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000	1	\$42,000	\$42,000

Excelsior Classical Academy

Teacher Assistants	4	\$22,500	\$90,000	4	\$22,500	\$90,000	4	\$22,500	\$90,000	5	\$22,500	\$112,500	5	\$22,500	\$112,500
B - Total Instructional Personnel:	19	\$177,500	\$650,000	21	\$177,500	\$724,000	24.5	\$177,500	\$852,000	29	\$177,500	\$1,002,500	32.5	\$177,500	\$1,130,500
A+B = C - Total Admin, Support and Instructional Personnel:	25.75	\$374,500	\$858,500	29.75	\$435,000	\$993,000	35.25	\$493,000	\$1,179,000	39.75	\$493,000	\$1,329,500	45.25	\$493,000	\$1,499,000
Administrative & Support Benefits															
Health Insurance	4	\$5,192	\$20,768	6	\$5,192	\$31,152	7	\$5,192	\$36,344	7	\$5,192	\$36,344	8	\$5,192	\$41,536
Retirement Plan--Other	4	\$2,355	\$9,420	6	\$2,175	\$13,050	7	\$2,207	\$15,449	7	\$2,207	\$15,449	8	\$2,108	\$16,864
Social Security	6.75	\$1,915	\$12,926	8.75	\$1,906	\$16,678	10.75	\$1,885	\$20,264	10.75	\$1,885	\$20,264	12.75	\$1,792	\$22,848
Medicare	6.75	\$447	\$3,017	8.75	\$446	\$3,903	10.75	\$441	\$4,741	10.75	\$441	\$4,741	12.75	\$419	\$5,342
Unemployment	6.75	\$251	\$1,694	8.75	\$260	\$2,275	10.75	\$267	\$2,870	10.75	\$276	\$2,967	12.75	\$285	\$3,634
D - Total Admin and Support Benefits:	28.25	\$10,160	\$47,826	38.25	\$9,979	\$67,057	46.25	\$9,992	\$79,668	46.25	\$10,001	\$79,765	54.25	\$9,796	\$90,224
Instructional Personnel Benefits:															
Health Insurance	18	\$5,192	\$93,456	20	\$5,192	\$103,840	24	\$5,192	\$124,608	29	\$5,192	\$150,568	32	\$5,192	\$166,144
Retirement Plan--Other	18	\$2,046	\$36,828	20	\$2,064	\$41,280	24	\$2,079	\$49,896	29	\$2,074	\$60,146	32	\$2,086	\$66,752
Social Security	19	\$2,121	\$40,299	21	\$2,244	\$47,124	24.5	\$2,156	\$52,822	29	\$2,143	\$62,147	32.5	\$2,157	\$70,103
Medicare	19	\$496	\$9,424	21	\$500	\$10,500	24.5	\$504	\$12,348	29	\$502	\$14,558	32.5	\$504	\$16,380
Unemployment	19	\$251	\$4,769	21	\$259	\$5,439	24.5	\$268	\$6,566	29	\$276	\$8,004	32.5	\$284	\$9,230
E - Total Instructional Personnel Benefits:	93	\$10,106	\$184,776	103	\$10,259	\$208,183	121.5	\$10,199	\$246,240	145	\$10,187	\$295,423	161.5	\$10,223	\$328,609
D+E = F - Total Personnel Benefits	121.25	\$20,266	\$232,602	141.25	\$20,238	\$275,240	167.75	\$20,191	\$325,908	191.25	\$20,188	\$375,188	215.75	\$20,019	\$418,833
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	35	\$853,202	\$256,326	47	\$943,946	\$336,057	57	\$1,109,796	\$406,668	57	\$1,196,618	\$406,765	67	\$1,309,700	\$458,724
B+E = H - Total Instructional Personnel (Salary & Benefits)	112	\$419,006	\$834,776	124	\$355,879	\$932,183	146	\$369,114	\$1,098,240	174	\$379,297	\$1,297,923	194	\$394,663	\$1,459,109
G+H = J - TOTAL	147	\$1,272,208	\$1,091,102	171	\$1,299,825	\$1,268,240	203	\$1,478,910	\$1,504,908	231	\$1,575,915	\$1,704,688	261	\$1,704,363	\$1,917,833

PERSONNEL															
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**Operations Budget: Expenditure Projections 2015-16 through 2019-2020**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
	Administrative & Support:					
Office:	Office Supplies	\$6,438	\$7,438	\$8,813	\$9,938	\$11,313
	Communications & Telephone	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000
	Equipment	\$25,750	\$4,400	\$6,050	\$4,950	\$6,050
	Software	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500
	Human Resources	\$644	\$744	\$881	\$994	\$1,131
	Board Expenses	\$300	\$300	\$300	\$300	\$300
Professional Contract	Legal Counsel	\$2,500	\$2,500	\$2,500	\$2,500	\$2,500
	Student Accounting	\$10,000	\$12,000	\$14,000	\$16,000	\$18,000
	Financial	\$30,000	\$36,000	\$42,000	\$48,000	\$54,000
	Audit Fees	\$0	\$9,000	\$9,000	\$9,000	\$9,000
Facilities	Facility Lease/Mortgage	\$387,500	\$465,000	\$542,500	\$620,000	\$697,500
	Maintenance	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
	Insurance (pg19)	\$20,535	\$21,535	\$22,535	\$23,535	\$24,535
	Scholastic Accident	\$1,750	\$2,100	\$2,450	\$2,800	\$3,150
	Custodial Supplies	\$6,000	\$6,000	\$7,000	\$7,000	\$8,000
Transportation	Buses	\$50,000	\$0	\$10,000	\$0	\$10,000
	Gas	\$20,000	\$22,000	\$24,000	\$27,000	\$35,000
	Oil/Tires & Maintenance	\$10,000	\$10,000	\$10,000	\$12,000	\$12,000
	Field Trips	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Other	Marketing	\$7,000	\$5,000	\$5,000	\$5,000	\$5,000
	Child nutrition	\$23,125	\$27,750	\$32,375	\$37,000	\$41,625
	Food Supplies	\$1,000	\$1,200	\$1,400	\$1,600	\$1,800
	<b>K - TOTAL Administrative &amp; Support Operations</b>	<b>\$646,042</b>	<b>\$676,467</b>	<b>\$784,304</b>	<b>\$871,117</b>	<b>\$984,404</b>
	Instructional:					
Classroom Technology	Computers	\$36,000	\$6,000	\$8,250	\$6,750	\$8,250
	Software	\$900	\$120	\$165	\$135	\$165
	Instructional Technology	\$5,000	\$1,000	\$1,000	\$1,000	\$1,000
	Tech Repair	\$0	\$2,500	\$2,500	\$2,500	\$2,500
Instructional Contract	Special Services	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
	Instructional Support	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Books and Supplies	Instructional Materials	\$40,000	\$40,000	\$41,500	\$43,000	\$45,500
	Curriculum/Texts	\$43,000	\$25,000	\$30,000	\$35,000	\$40,000

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Books And Supplies	Instructional Equipment	\$25,000	\$7,500	\$7,500	\$7,500	\$7,500
Books and Supplies	Testing Supplies	\$3,500	\$4,000	\$4,500	\$5,725	\$7,025
Other	Professional Development	\$35,000	\$39,000	\$43,000	\$47,000	\$52,000
	L - TOTAL Instructional Operations	\$231,400	\$168,120	\$181,415	\$191,610	\$206,940
	K+L = M - TOTAL OPERATIONS	\$877,442	\$844,587	\$965,719	\$1,062,727	\$1,191,344

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
J - TOTAL PERSONNEL	\$1,091,102	\$1,268,240	\$1,504,908	\$1,704,688	\$1,917,833
M - TOTAL OPERATIONS	\$877,442	\$844,587	\$965,719	\$1,062,727	\$1,191,344
J+ M =N TOTAL EXPENDITURES	\$1,968,544	\$2,112,827	\$2,470,627	\$2,767,415	\$3,109,177
Z - TOTAL REVENUE	\$2,201,310	\$2,618,202	\$3,037,903	\$3,357,604	\$3,777,304
Z - N = SURPLUS / (DEFICIT)	\$232,766	\$505,375	\$567,276	\$590,190	\$668,128

**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.*

We are projecting 250 students across five grades with two sections per grade in the first year. We based this projection on three facts:

- a) existing schools of choice, both magnet and charter, in Durham County have long wait lists and many more applicants than spaces for all grades,
- b) there is a need for a school with a curriculum that is taught at a high level for all and that closes achievement gaps, and
- c) we have talked to community leaders, organizations, and parents in the area, and we feel there is a demand for such a school in Durham.

We have made budgetary assumptions as follows:

Staffing - 10 classroom teachers, 2 EC teachers (assuming 13.7% EC, per LEA), 4 teaching assistants, 3 half-time bus drivers, one 3/4-time bus driver who will manage the buses, 1 half-time music teacher, 1 half-time art teacher, 1 PE teacher, 1 Spanish teacher, 1 school director, 1 academic dean/curriculum coordinator, 1 administrative assistant/data manager, and 1 business/human resources manager.

Special Services - \$40,000 - this section covers all contracted services pertaining to Speech, ELL, EC, Psychologist's evaluations, OT/PT, etc.

Benefits - Health Insurance is assumed at about 5200/ee based on current health plan. Retirement is based on 6% of full time staff.

Facility-Based on 100 sq ft per student @ \$15.50/sq ft. Lease amount includes maintenance, utilities, water, janitorial services, and landscaping.

Transportation-purchase five used buses @ \$10,000 per bus (1 spare in case of bus breakdown). TJCA-CFA and LLCA-CFA have been able to get used buses that are in good condition for half that or less.

Free Lunch Program-based on bag lunches for half of students.

Instructional Support-supplies for tutoring and parent programs.

Other operating costs-based on historical trends of existing charters per ANS analysis.

We have considered a worst-case break-even budget based on 180 students across five grades in the first year. We would have to adjust the budget in areas of staffing, supplies, and busing, etc. With fewer students, we might need fewer teachers, and we would not have assistants. We would have only one EC teacher or would contract out EC services. The curriculum materials

would cost less, as would business services and school and janitorial supplies. We would purchase two buses instead of five, and gas and maintenance costs would be lower. In this break-even budget, we would not have an Academic Dean/Curriculum Coordinator. We would probably eliminate the Business/HR Manager position and the Data Manager/Administrative Assistant instead would interact with our accounting service provider.

We expect to be able to meet our projected numbers, but if we do not, we will adjust the budget as needed. We are committed to fiscal responsibility and a balanced budget. In our projected budget, we have tried to keep expenses to no more than 90% of revenue. That safety margin would likely narrow if projections are not met.

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

If we do not receive anticipated revenues in any year, we would still have to add space and teachers as the grade levels are added, but we would have lower costs than projected in busing, curriculum, teachers, assistants, insurance, and so on. It is likely we would have to adjust administrative staffing, as well. We would have to cut the budget to bare bones.

If revenue projections are not met and we cannot meet budget after adjusting, we will also consider the following options:

Fundraising by board and parents.

Applying for grants.

Obtaining a line of credit at a local bank.

Further support from TeamCFA, such as receiving the second installment of the forgivable loan in the first year.

We will do everything we can to attain our projected numbers, and will also budget based on 90% or less of our revenue each year.

*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*

*As part of the TeamCFA network of schools, Excelsior will receive \$300,000 in start-up funding to be distributed over the first three years. The first \$100,000 installment may be used to cover start-up costs in the pre-opening stage of operation. The second and third \$100,000 installments are to be used to support the academic program and staff development. This funding will be set up as three forgivable loans, with the first \$100,000 loan forgiven in year four, the second in year five, and the third in year six of Excelsior's existence. This forgivable loan is documented in a letter in Appendix R.*

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

19:1

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

We will contract with Acadia Northstar for accounting services. We will have a Business/Human Resources Manager or an Administrative Assistant, depending on student numbers, who handles financial and human resource duties and interacts with Acadia Northstar.

An independent auditor will perform an annual review of our school's work and Acadia's work related to our school.

We have chosen our auditor and administrative services based on the recommendations from our fellow TeamCFA schools and other North Carolina charter schools.

In terms of contracting for instructional support such as speech, etc., we will look for the highly qualified individuals in each area. They would have to have the appropriate experience, degree(s) and license(s) and be able to pass a background check. We have budgeted \$40,000 specifically for this, and we have also included some funding for materials to support our tutoring service (under Instructional Support).

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

We are budgeting for PE, Music, Art, Spanish, and Latin teachers to meet our commitment to physical activity, the arts, and languages in the grades we will have in the first five years. We have budgeted for the Core Knowledge curriculum, the resources necessary to teach it, and the professional development to train our teachers to implement it faithfully. We have also budgeted for Singapore math. In-house training on the classical curriculum will not need to be budgeted because it will have no additional cost.

We have included money in the budget for buses, fuel, maintenance, and drivers so that we can provide transportation for those who need it, as we are committed to reaching out to all students.

We have included money in the budget for lunches for students who cannot afford them.

We have included money in the budget for tutoring supplies and parent workshop materials.

We have included money in the budget for students who cannot afford to pay for field trips, so that all may participate.

We will attempt to raise money through fundraisers to help parents, especially in the areas of uniform purchases and field trips. Our Forum will keep a "Uniform Closet" of donated, used uniforms to distribute to those in need.

We will use budgeted funds to meet the priorities of our mission and curriculum and the needs of our students.

The forgivable loan funding provided by TeamCFA will be used for start-up costs and professional development. This forgivable loan is documented in a letter in Appendix R.

The school's board is committed to 'living within our means' and keeping a balanced budget. We will be careful to budget in such a way that we gradually build a reserve fund. One method to build a contingency reserve is to budget on 90% of our revenue.



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

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

The budget will be based on no more than 90% of income, so we will use that remaining 10% to develop a general fund. Given our projected budget, at the end of the second year, we will have more than enough of a balance to cover operating expenses for 40 days of school.

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

We will be leasing and not purchasing a facility at first, so there will be no financing. Lease payments will be funded using ADM dollars and TeamCFA forgivable loans.

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*

Other TeamCFA schools have had great success in sharing and re-purposing physical assets such as furniture and textbooks. Many times, TeamCFA schools have passed along used books or furniture when purchasing new ones. Also, TeamCFA has generously given grants for technology and training to other network schools. We are part of the TeamCFA network of schools, and as such will likely have access to these types of benefits.

**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?*

We have planned our staffing and organization of the board and committees in order to achieve a separation of duties for financial transactions among the School Director, Business/HR Manager, Board Treasurer, Finance Committee, and accounting service.

Our board's finance committee will develop financial management policies appropriate for the needs and risks of the organization. They will also oversee the school's adherence to these policies and will engage an external auditor to assist in this task. Samples of policy areas: spending authorities, check signing requirements, purchasing guidelines, bidding requirements, separation of duties, document retention, budget management, and budget amendment.

All assets will be reported in the Director's and Business Manager's financial reports to the Board of Directors. The President and the Treasurer will work closely with the Director and Business Manager to assure that all assets are protected and working towards the growth of Excelsior.

In the matter of retention of documents, Excelsior will use the recommendations of nationally recognized nonprofit attorney Tom Silk who wrote a document retention policy on a pro-bono basis that is available on the internet for all non-profits (<http://www.blueavocado.org/content/model-document-retention-policy-nonprofits>).

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

The only possible related party transaction would be using some of the land belonging to a church for which one of our board members is the pastor. That is not our first option for a facility, but it is a possibility. There is no cost involved.

*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.*

Excelsior Classical Academy CFA will contract with the firm of Darrell Keller to perform a yearly audit.

Darrell Keller, CPA, PA  
P.O. Box 1028  
105 South City Street  
Kings Mountain, NC 28086  
Office Phone: 704-739-0771  
Fax: 704-739-6122  
email: [dkeller@dlkcpapa.com](mailto:dkeller@dlkcpapa.com)

**VI. AGREEMENT PAGE**

**Application Fee:**

*Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$500 application fee to the Office of Charter Schools. The applicant must submit their application fee by the December 6, 2013 5:00 pm EST deadline. Payments will be accepted in the form of a check only. Cash or credit cards are not accepted.*

*\*Application Note: The applicant must mail the check along with a copy of the proposed charter LOI to be received before or on the due date of December 6, 2013 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-238.29B(e).*

excelsior2015

Date: 11/09/2013

**Applicant Signature:**

The foregoing application is submitted on behalf of Excelsior Classical Academy (*name of non-profit corporation 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.

Print/Type Name:

Board Position:

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

Date:

Sworn to and subscribed before me this  
\_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

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

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

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

