



Application Preliminary Evaluation Packet

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

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

Subcommittee Members:

Cheryl Turner
Carol Ann Hudgens
Kathryn Mullen Upton
Becky Taylor
Helen Nance
Alex Quigley
Kristen Vandawalker
Darrell Johnson
Alan Hawkes
Steven Walker

Date of Review:

10/22/2014

Union Day School - Union Day School will deliver a rigorous and content-rich education to a diverse community of students, in a shared conviction that each student will achieve high quality academic success and enriched personal growth.



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Union Day School

Public charter schools opening the fall of 2016

Due by 5:00 pm, September 26, 2014

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
2014 Application Process
To open a charter school in the 2016-2017 school year

APPLICATION DUE DATE/TIME

September 26, 2014 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

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

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

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 26, 2014 at 5:00 pm EST. **All applications - must be submitted using the online portal** and applicants are to use the following specifications:

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

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Union Day School

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

Name of non-profit organization under which charter will be organized or operated: *Union Day School, 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: *Erin Kirkpatrick*

Title/Relationship to nonprofit: *Chair of the Board of Directors*

Mailing address: 8111 Red Oaks Trail
Waxhaw NC 28173

Primary telephone: 704-989-4322 Alternative telephone: 794-843-5090

E-Mail address: UnionDaySchool@gmail.com

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

County: UNION

LEA: 900-Union County Public Schools

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

No:

Yes:

If so, provide the name of the third party person or group. NC Public Charter Schools Association

List the fee provided to the third party person or group. \$24,000

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

The NCPSCSA provided guidance, advice, resources, administrative assistance,

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and editing for this application. The mission, vision, and ideas contained in the application are the board's. The NCPCSA will provide guidance and assistance to the board through the evaluation and interview process and CSAB approval. Subsequently, and until State Board of Education (SBE) approval, the NCPCSA will help with marketing, including helping design and implement presentations for prospective parent meetings, designing and driving social media, assisting with public relations including press releases, continuing the development of employee policies including head of school search, and attendance at all board meetings.

The fee will be provided to NCPCSA only upon the successful opening of a charter school in 2016. Assistance under the contract continues through the State Board of Education approval, however it is understood that support through the school opening and its first year of operation is available on an as requested basis.

While the vast majority of this application's content was written by the UDS, there is language and terminology that the NCPCSA assisted with and which may appear in other charter school applications. That content is therefore original source content of this applicant when provided by the NCPCSA.

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

No:

Yes:

Submit the following evidences (Appendix A) to support the conversion of the traditional public to a charter school:

- *Statement of Support signed by the majority of the teachers and instructional support personnel currently employed at the school*
- *List of current staff receiving compensation from the traditional public school*
- *Current school enrollment*
- *Parent support of the conversion*

Outline the 3 year financial history of the proposed converted charter school in the chart below and attach the past 3 year tax returns.

<i>Financial History YR2011</i>	<i>Financial History YR2012</i>	<i>Financial History YR2013</i>
---------------------------------	---------------------------------	---------------------------------

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

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? Union Day School, Inc

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2016 Month August

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Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03	325
Second Year	K,01,02,03,04	425
Third Year	K,01,02,03,04,05	525
Fourth Year	K,01,02,03,04,05,06	625
Fifth Year	K,01,02,03,04,05,06,07	725

The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school finances and student performance.

I certify that I have the authority to submit this application, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the non-profit organization.

udscharter
Signature

Board Chair
Title

udscharter
Printed Name

09/26/2014
Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>This makes it sound as if the applicant is admitting plagiarism.</u>	<u>Kristen Vandawalker</u>	<u>Cover Page</u>
<u>these projections don't make sense given the explanation in the narrative.</u>	<u>Kristen Vandawalker</u>	<u>Grade Levels</u>
<u>Proposed school will be located in a county with another K-12 charter school. In recent years, schools that projected enrollment numbers similar to these fell short of their goals. How would this school market to ensure the proposed 325 is met the first year?</u>	<u>Darrell Johnson</u>	<u>Grade Levels</u>
<u>Appendix A indicates that there is need, although the survey information didn't include data on whether prospective parents/guardians might send their child to the proposed school. As such it's difficult to determine whether the enrollment figures are realistic.</u>	<u>Kathryn Mullen Upton</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Cheryl Turner</u>	
<u>Carol Ann Hudgens</u>	
<u>Kathryn Mullen Upton</u>	<u>Pass</u>
<u>Becky Taylor</u>	
<u>Helen Nance</u>	
<u>Alex Quigley</u>	
<u>Kristen Vandawalker</u>	<u>Fail</u>
<u>Darrell Johnson</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

Union Day School will deliver a rigorous and content-rich education to a diverse community of students, in a shared conviction that each student will achieve high quality academic success and enriched personal growth.

Clearly describe the mission of the proposed charter school:

Union Day School's mission is to provide a solid and rich foundation to every child. The Board of Directors firmly believes in the potential and capability of every child given the opportunity and environment of success. Union Day School's mission is to ensure the growth and success of every child, regardless of financial status, background, or disability, believing in them and ultimately inspiring them to discover their individual power to achieve what they dare to dream.

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.*

Union Day School will serve, by year five, kindergarten through eighth grade students. The targeted population will reflect the overall make up of Union County schools (13.27% African American, 67.17% Caucasian, and 14.98% Hispanic). Having a higher percentage than the state average of Hispanics in Union County, we expect to be servicing many ELL students.

According to the Resolution Regarding Redistricting signed July 8, 2014 we know the following to be true:

"Union County Public School System has been one of the fastest growing in the country over the past 15 years, with enrollment increasing from 22,000 in 1999-2000 to an anticipated enrollment in excess of 42,000 for the 2014-15 school year."

"Substantial school construction has not kept pace with student growth and location of that growth, resulting in severe overcapacity issues in a number of schools." (Union County Public School Web document)

Union Day School is seeking to permanently locate in a location central to Eastern and Western Union county easily accessible to both Northern and Southern Union County. Projected residential growth is expected to move South of Charlotte so it would not make sense to permanently locate near the Northern tip of Union County as that growth too, is expected to move South.

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As a result of our desirable permanent location Union Day School is expected and strategically designed to engage and reflect the overall demographic makeup of Union County.

Ninety-four percent (94%) of participants responding to our online survey thought a free public charter school is needed now in Union County. (See Appendix A-1 for Illustration from Survey) See also Resolutions adopted by several elected governing bodies within Union County in support of Union Day School specifically and charter schools in Union County.

- 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).*

Union County Public Schools' enrollment for 2013-2014 by grade: K-2934 1-3064 2-3109 3-3167 4-3155 5-3284 6-3380 7-3513
UDS by year 5 = 725; k,1,2,3,4 will each have 100 kids and grade 5,6,7 will be 75 each. Year 6 will include grade 8 totaling 825 children in grades Kindergarten through 8th grade. Union Day School plans to apply to become a K-12 school in the few years preceding the need to add 9th grade adding 100 children each year respectively with a total capacity of 1,225. With regards to a comparative example, compared to Porter Ridge Elementary and Middle school with a student population of 2,004 (based on 2013-2014 20 day enrollment) Union Day School will provide approximately just 61% of comparable enrollment due to the capacity differences between the schools. Union Day School as a k-8 school or ultimately a K-12 school designs children to enroll in the lower school years to gain an educational foundation pivotal to success in the middle and high school years. Another example would be combining Kensington Elementary School and Cuthbertson Middle School with a combined attendance (based on 2013-2014 20 day enrollment figures) of 2,004 compared to Union Day School 1,225 or 61% with all K-8 grades. Figures above do not reflect the 2014-2015 20 day enrollment figures as they have not been made public at the time of application submittal; however, it should be noted that Union County Public Schools redistricted for the school year 2014-2015 increasing attendance at a good number of schools such as Parkwood Middle, Newtown Elementary, Waxhaw Elementary, Sun Valley Middle, etc.

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

Union Day School's combination of curriculum, teaching methods, student to teacher 10:1 ratio for Kindergartners, extended learning day, and transition into the Middle School International Baccalaureate Program are uniquely designed to promote success of it's students. With offerings such as Handwriting Without Tears, Singapore Math, Reader and Writer Workshops, Inquiry Based Science, and foreign language beginning in Kindergarten, Union Day School will seamlessly matriculate its students from Kindergarten through Eighth grade.

Union Day School's teaching methodology was carefully researched and selected with the intention of offering extended time to master concepts on an individual basis and allowing rigor. The combination and transition of learning throughout Kindergarten to Eighth grade in and of itself differs vastly from the LEA's. Phonetic Reading is proven to succeed. Reader's

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workshop engages children to love reading by children choosing their books based on units of inquiry such as fiction, non-fiction, ocean, earth, etc. Children become lovers of reading. Handwriting Without Tears, designed by an occupational therapist, removes the trauma from handwriting for all children. Children begin to see letters and numbers in shape association and quickly assemble the units into letters, drawings, etc. Children must master writing and reading to express themselves and to begin to discover the world around them. Writer's Workshop becomes a cross implementation of reading a story, asking questions about the story's content, transposing the comprehension onto paper while learning grammar, sentence structure, and literary characters. The America's Heritage History supplement preserves the history of the Unites States of America for future generations to come. Inquiry Based Science works with a child's natural inquisitiveness. Teaching the children to ask the How? and Why? questions engages deeper thinking. Teachers facilitate learning but do not dictate it. An engaged child is more apt to learn.

Middle School IB provides rigor. IB prepares children for college readiness and success. Eight subjects provide an array of critical thinking for a competitive National and World Market. Fluidity of curriculum throughout the years is essential to success. Union Day School will understand the educational histories of its students, know the destination, and how to get them there. Union Day School's curriculum builds upon itself and more importantly the child and his/her progressive knowledge. The beauty of the chosen curriculum for Union Day School, is its applicability to the child with learning disabilities, the child who may be academically gifted, and every child in between in a mutually loving and supportive environment.

Union Day School will meet or exceed the adopted North Carolina State standards which is the same as the LEA's but with our methodology, supplements, and one on one teaching styles to all children through Kindergarten to Eighth grade. Students will be taking a foreign language beginning in kindergarten and they will be working in cooperative groups. UDS will require community service for all students, producing civic minded individuals that will have a positive impact on the community.

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

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

The Six Legislative Purposes of a Charter School are:

1. *Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.*
2. *Hold schools accountable for meeting measurable student achievement results.*
3. *Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.*

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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.*

2. Hold Schools accountable for meeting measurable student achievement results. - At Union Day School, educating our students to their fullest potential is our sole responsibility. We will perform all NC required testing. Additionally, our students will take the NWEA MAP, three times a year and classroom teachers will perform informational reading assessments regularly. We believe these formal and informal assessments will allow teachers to monitor student progress and tailor instruction to the needs of our students. Progress reports will go home regularly to allow parents to monitor their students performance and progress on a regular basis.

Our extended curriculum day model will serve to meet achievement results both collectively and on an individual basis for all grades. Special emphasis is given to Kindergartners as we believe children can often miss a fundamental which forces them to struggle. We believe in arming our children with the tools necessary for excellence. Reading, Math, and Handwriting are essential to master all other skills. We address this by having teacher's assistants in Kindergarten classrooms to achieve Mastery. Children who master these skills become hard wired in the knowledge and problem solving skills essential to exhibit achievement. Union Day is motivated to teach the individual child how to think, not what to think. The very essence of critical thinking inspires children to solve problems whether it be on a test, reading for discovery, asking questions to form their own individual opinion, or gaining a sense of self-satisfaction and ultimately self-confidence. Self-confident children are more successful than children who doubt themselves. Union Day School's very mission is to assist the individual child to progress. The opportunity to observe and measure that growth is rewarding in and of itself, but showing measurable results is vital to accountability. In a free market society, competition proves to be healthy. As Union Day School proves accountability to meeting or exceeding the standards, we hope we spark healthy competition between schools for the benefit of the children.

3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system. - Union Day School will build a community for both children and parents through our Kindergarten through 8th grade model offering extended curriculum school day and eventually, a rich after-school program full of extra-curricular options and tutoring. Parents who might not have access to after school tutoring or could not afford to hire a tutor, will now have this service as part of the Union Day School family. Union Day School plans to offer enrichment programs through community volunteers and affiliations giving access to every child. With lessons like basketball, horseback riding, and tennis, musical instrument lessons, or after school clubs, students that would not be exposed to these programs at the local LEA will benefit from having these opportunities brought to them. Union Day School believes every child should have the opportunity to discover their passions. We are committed to ensuring every child is well fed to aid retention. Many

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of the learning methods being implemented by Union Day School are often offered in expensive prestigious private schools. Union Day School is passionate about providing this option to all families and children. Union Day School believes in Servant Leadership and modeling excellence.

Union Day school lower school students will seamlessly transition into the proven rigorous Middle School International Baccalaureate Programme after having received the proper foundation skills and confidence. Without having to change schools and adjust to a new culture, our Students will be able to focus and begin this program in sixth grade, continuing to build on the critical and independent thinking skills they learned in lower school

Goals for the Proposed Charter School:

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

Goal 1. The following percentage of students will demonstrate at least one year of academic progress in reading and math.

Year 1: 73%

Year 2: 76%

Year 3: 79%

Year 4: 82%

Year 5: 85%

Measured using NWEA MAP scores from Fall of one year to the next.

Goal 2. The following percentage of students will be at or above grade level on NC end of grade testing in reading and math.

Year 1: 70%

Year 2: 73%

Year 3: 76%

Year 4: 79%

Year 5: 82%

Measured using the NC end of grade testing scores for reading and math.

Goal 3. 90% of UDS parents will be satisfied with the school's performance and their child's academic progress.

Measured using an annual end of year parent survey.

Goal 4. Students will perform age and developmentally appropriate community service.

Kindergarten 3 hours (total)

1st grade 4 hours (total)

2nd grade 5 hours (total)

3rd grade- 6 hours (total)

4th grade 7 hours (total)

5th grade 8 hours (total)

6th grade 10 hours (total)

7th grade- 12 hours (total)

8th grade- 15 hours (total)

Measured by Union Day Community Service Hours Log.

Goal 5: 90% of students, with an IEP, will meet at least 85% of their end-of-year academic goals.

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Measured by students final progress report.

Goal 6: 95% of students proficient in cursive handwriting by the end of 5th grade.

Measured using the Handwriting Without Tears Screener of Handwriting Proficiency assessment.

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

The mission of UDS will be formally restated in all board meetings. The board will be made aware of the school's progress toward meeting its goals through periodic reports from the School Improvement Team, monthly reports from the principal, testing and survey data, and an annual report prepared by the principal.

Given all of the data available to it, the board will get a clear picture of how well the school is working towards meeting its school-wide goals which will be a reflection on how well the school is meeting its mission.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Three different mission statements?	Kristen Vandawalker	Mission Stat
The mission isn't quite clear as to what constitutes high quality academic success (e.g., college/career ready?) and enriched personal growth. Question for interview: please describe.	Kathryn Mullen Upton	Mission Stat
why does grade level size drop 25 students in middle grades? where do you expect to lose the 25 students between grades 5 and 6? what happens if more students desire to matriculate? Do you anticipate zero attrition? given this description, shouldn't enrollment be 400, 400, 575, 650, 725, 800? Is this meant to be a k-8 school or a k-12 school? it is unclear how this proposed curricula differ from the LEA? does the LEA simply not offer IB and not use the names programs? Why not uses early years IB? how will students transition from the named products to IB? What work has been done to prepare from IB candidacy? No information about the size, scope or methodology of the survey, or the "resolutions in support of" the school.	Kristen Vandawalker	Educational
what is the typical grade configuration for this area? are students typically in 3 different schools for ES/MS/HS? are the particular extracurriculars in such high demand that students will choose a charter because of them? It is unclear what is special or unique about this program that will attract parents/students.	Kristen Vandawalker	Purposes of
Goals are not addressed in SMART terms and lack rigor. Given that students will be in primary grades, these goals seems abysmally low. Why would you now expect 100% of students to make a full year of academic growth? Why are there no BOY to EOY measures? What is the basis for community service goals? Where did the number of hours come from? These seem too low to have meaningful impact on the students. Why does cursive penmanship rise to the level of an academic goal? The answer regarding board awareness is wholly inadequate.	Kristen Vandawalker	Goals for th
The community service goals are vague. Are the hours mentioned an annual goal?	Darrell Johnson	Goals for th
There are no finance or governance goals included. Those would strengthen the board's ability to assess the effectiveness of the school.	Kathryn Mullen Upton	Goals for th

Reviewer	Score
Cheryl Turner	
Carol Ann Hudgens	
Kathryn Mullen Upton	Pass
Becky Taylor	
Helen Nance	
Alex Quigley	
Kristen Vandawalker	Fail
Darrell Johnson	Pass
Alan Hawkes	
Steven Walker	

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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.

Our curriculum will be based on Barbara Blackburn's definition of educational rigor. According to Blackburn (2008), "rigor is creating an environment in which each student is expected to learn at high levels, and each is supported so he or she can learn at a high level, and each student demonstrates learning at high levels."

Literacy Block: To achieve our mission, all students will be engaged in Reader's Workshop using standards from the NC ELA Common Core. Students will interact with authentic texts and during guided reading teachers will focus on the strengths and weaknesses of each student through the use of leveled readers (e.g. Fountas and Pinnell, Rigby, etc). Other crucial areas of the Literacy Block will include read-alouds, independent reading, writing, speaking, listening, and vocabulary building.

Writing and Handwriting: K-5th grades will build fluency in writing through continual exposure to writing via mini-lessons, writing, and sharing. Writer's Workshop allows teachers to increase instructional support of all stages of writing. Throughout this process, a specific purpose for a real audience is modeled, the writing process is continually modeled and taught, and writing across the curriculum is embedded continually. Additionally, Handwriting without Tears will be employed to teach students handwriting skills through a multi-sensory, developmentally-appropriate approach.

Math: The Singapore Math Mastery approach allows students in the same class to be learning the same skills, but at a different pace. Singapore math relies heavily on visualization, making it engaging for multi-modal learners. This approach is often overlooked in math and seems to help many learners.

Science: Using the NC Essential Standards, teachers will incorporate project-based learning and guided inquiry that fosters collaboration, a passion for curiosity, strategic thinking, and genuine investigation.

Social Studies: American Heritage, an Adventure in Liberty, will supplement the NC Social Studies Essential Standards K-5th grades. American Heritage is a free K-12 curriculum supplement for social studies. The K-5 lessons correlate with nationally applicable Core Knowledge Skills and include the following topics: American symbols and their history, Colonial America, Declaration of Independence and U.S. Presidents.

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International Baccalaureate Program Requirements: Middle school students will begin the International Baccalaureate (IB) Program. We believe that the IB Middle Years Programme (MYP) best aligns with the tenets of our mission. The MYP will continue to help our students become critical thinkers, make authentic cross curriculum connections, master concepts and skills versus memorization, make informed decisions, and prepare them for the diverse world. The IB MYP is made of eight subject groups: English/Language Arts will include reading, writing, listening and speaking; Mathematics (see scope and sequence); Sciences Physical, Earth and Life; Humanities/Social Studies will include Geography and US History; Physical Education and Health; Second Language; Technology; Arts. We will begin the application and authorization process in year three with our request for IB MYP candidacy. The following year, we will start the candidate phase/request for authorization with the implementation of our sixth grade students. Staff will be trained and advice will be given by IB during this phase. We will continue implementation of the MYP with our seventh graders the following year, as we enter the verification visit phase with IB. The cost of implementing the IB MYP has been addressed within our budget. As part of the IB MYP, students will be required to do community service hours which increase with each grade. We believe community service makes a positive impact on a student's academic success and instills a sense of honorable purpose.

Curriculum and Instructional Design:

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

The learning environment at Union Day School will be a traditional age based grade structure. Kindergarten will have 20 students to 1 teacher and 1 Teacher-Assistant. The very basis of Readers' Workshop and its reading level centers along with Writers' Workshop allows for even smaller group instruction, remediation, and enrichment during the English Language Arts time. Desks will be arranged in groups, fostering an intimate environment and similar learning styles for all subjects within the home classroom. Classrooms will contain posters of lifetime words, clearly labeled level readers in bins for, a rocking chair for Read Aloud sessions, images of proper character construction, and a variety of centers with math manipulatives, etc.

Inquiry based science lessons will allow students to work cooperatively fostering intellectual and cultural growth. Smaller student to teacher ratios are pivotal to a child's successful retention during the educational foundation years. Union Day School seeks to aid students in the mastery of foundation skills such as Reading, Math, Writing, Spelling to ensure their confidence and future success.

Grades 1 through 8 will consist of 25 students to 1 teacher. Union Day middle school students will observe a traditional middle school schedule with subject specific teachers. classes in first through fifth grade will preferably consist of 25 students. Grades 1 and 2 will follow the same center and small group model as described above. Desks will be in groups of five.

As children mature into grades 3 and 4, desk placement begins to transition into more of an independent working environment but allowing for

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collaboration as needed. Classrooms begin to take on a traditional layout through Middle grades 5 through 8.

Provide a synopsis of the planned curriculum, including:

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

Union Day School will pull its student population from all over the county as a result; the planned curriculum is designed to align with NC State Standards and the NC Accountability Model for which all students will be tested. Shortly after the start of school, students in kindergarten through fifth grade will be assessed to determine their reading level. At that point, the teacher will begin to tailor a student's reading instruction by placing students into small, flexible groups based on their reading level and reading needs. A five-finger rule will be encouraged with regards reader's book selection. If the student identifies five words on the first page s/he is not familiar with, the book is too difficult. Readers' Workshop encourages children to select from level appropriate books that interest them. Interested learners are engaged learners. Singapore Math will be taught daily and supplemented with manipulatives in small groups and individualized instruction, as needed. Inquiry based science for elementary students and IB Middle Years Programme will help round out the rigorous, content-rich, high quality, differentiated curriculum. Students will be encouraged to ask "How?" and "Why" questions leading them into a discovery process. As the students document their findings through writing, cross-curriculum learning occurs aiding retention.

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

Providing a rigorous, high quality, content-rich curriculum, built upon the North Carolina Standard Course of Study, Union Day expects its teachers will come with a firm knowledge base of these standards and skill set to implement the curriculum. Elementary teachers will be asked to collect and analyze data from running records, NWEA MAP scores, and benchmark assessments, to provide individualized instruction, remediation and enrichment, as needed to meet or surpass North Carolina Accountability Model and maintain the mission of the school. Union Day expects our highly qualified staff will come with the skills to conduct and analyze student data. Middle school teachers will be provided with any IB training needed to implement the IB Middle Years Programme. In addition, Union Day will require each grade teacher to tutor one day a week to provide additional instructional support to any student. Teachers will rotate, within their grade level, for tutoring to minimize the possibility of teacher burn out.

5. *Explain how the proposed instructional plan and graduation requirements will ensure student*

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readiness to transition from grade to grade and to the next grade span upon program completion.

The mission of Union Day is to provide a rigorous curriculum at every grade level. Through continued informal assessment (in elementary grades), formal NWEA MAP testing (for all grades) and end of grade state testing (3rd-8th grade), Union Day will be able to ensure our students are prepared for the next level in their educational career. We believe the implementation of the IB MYP will ensure students are well rounded in their education. They will have developed into inquisitive critical thinkers who work well in a cooperative group. We believe that at every level of our elementary curriculum, we have chosen proven instructional strategies and curriculum that will allow our students mastery of grade level skills, not just fact memorization.

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

The calendar for Union Day supports its mission through an extended instructional day. Students will have 7 hours 50 minutes of instructional time daily. We believe this additional time will allow for a rigorous, high quality, curriculum for all students. By increasing our instructional day, Union Day will be cumulatively adding an additional month of instruction or +185 hours totaling 1,210 hours. Maintaining the 185 days preserves quality of life for students and families by aligning with the local school system calendar. By aligning with the local school system calendar, parents with children in multiple schools are able to maintain a central schedule for holidays. Parents will be able to pick up children from other area schools and be on time to pick up children from Union Day School. This staggering time also has the potential to reduce traffic which results in a shorter ride home for the child. Additionally, the extended one hour per day will aid many families who utilize extended day programs for cost in other schools. Often this cost is a hardship for many families and those of single parent households especially. While the cost savings of approximately \$1,850.00 per year per child (based on \$10.00 per hour childcare) was not the motivation of Union Day School to extend its hours, it is certainly an undeniable benefit to the diverse set of children we intend to serve. We also value the extended learning day for children who may have otherwise been home alone. Due to Union Day School's extended schedule they will be under supervision and gaining exposure to the learning environment at a rate of nearly 20% greater than the LEA children. Many children do not have adult assistance at home to help with homework and additional mastery of skills. This added time in class allows for a healthier pace for core subject framework and ultimately higher retention.

With over an 80% out-commute rate for working families in the area this later time will benefit those households as well. With older grades, students will easily transition into extra-curricular activities after school. Professional development and teacher workdays have been added to assure teachers have time throughout the year for needed professional

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training, as well as, planning. Parent-teacher conferences will be planned twice a year before or after the instructional day.

With regards to our proposed IB curriculum, the extended learning time greatly aligns with the eight subject blocks. Union Day School calendar and extended learning day is just another way we will support children to achieve excellence.

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.*

At Union Day School, we believe every staff member plays a role in the success of our students and as such, a Response to Intervention (RTI) team will be formed to include the principal, EC teacher and at least one teacher from every grade level. Research shows that there are early indicators for "At-Risk" students and Union Day teachers will receive training on these indicators. We believe that early intervention is essential in the success of "At Risk" students and by continuous monitoring of students progress should guide classroom instruction. However, when a student continues to exhibit low academic performance (defined as below grade level or at/or below a 2.0 GPA) he/she will be referred for RTI. The RTI team will review of his/her academic performance on all assessments (NWEA MAP, READY/end of grade testing, benchmark assessments, out of school assessments, etc), as well as teacher observation. The team will work in partnership with the classroom teacher and students parents, to develop an action plan for the student. At Union Day School, we believe that every student is unique and as such, each action plan will be tailored to the educational needs of the student. If the student makes no academic progress as a result of the action plan, the classroom teacher will make another referral to the RTI team. The team will then evaluate the need for further assessment, that may result in an Individualized Education Plan (IEP) or 504 plan for the student.

- 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.*

Union Day School will conduct a home language survey at the start of each school year, per the NC State Board Policy, to identify ELL students. The EC teacher will check the home language surveys upon their return. Teachers may refer students directly to the EC teacher for ELL services evaluation. Students identified as ELL will be given a placement test like WIDA ACCESS (or W-APT) and continually tested annually. If a student qualifies for services, Union Day will provide the necessary services through a contracted specialist.

To ensure academic success and equitable access to core academic programs for our ELL students, Union Day will provide small group ELA instruction, after school tutoring, an action plan will be developed by the RTI team, and continuous monitoring by the classroom teacher. Monitoring of newly

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identified and existing ELL students will come from teacher(s) and any contracted specialist observations and documentation. If the student is not successful while on the action plan or not meeting the NCs annual measurable achievement objectives (AMAOs), he/she will be evaluated for further resources and strategies, by the RTI team in partnership with the family and contracted specialist.

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.*

Union Day School identification of intellectually gifted students for kindergarten through second grade will be via teacher observation and documentation. Beginning with third grade, intellectually gifted students will be identified using one or more of the following screening options: aptitude test, end of grade state testing, NWEA MAP scores or identification from another school system.

A.) At Union Day School, we share the belief of Samantha Bennett, "Our ultimate priority should be to know our students deeply in order to teach them well to know when to push them and when to pull them, to know just what they need at the perfect teachable moment. We must know more in order to help students know more, do more, be more and perform" (Bennett, Samantha. *That Workshop Book: New Systems and Structures for Classrooms That Read, Write and Think*. Heinemann: Portsmouth, NH. 2007). The curriculum of Union Day has been crafted to allow each student to perform at their instructional level. Through the balanced literacy approach of Readers Workshop, intellectually gifted students will be able to work with others, on their level. Students will be continuously monitored through running records, conferencing, benchmark assessment, etc for movement into different groups. Inquiry based science lessons allow intellectually gifted students to learn at their own rate and has proven to be very conducive to intellectually gifted students. The International Baccalaureate Middle Years Programme was chosen by Union Day because of its track record of academic success and excellence. Union Day believes the IB MYP curriculum will prove challenging and enriching instruction for our intellectually gifted middle school students.

B.) Monitoring of intellectually gifted students will be ongoing through teacher(s) observations, running records, conferencing with students. MAP testing and benchmark assessments will allow for a more norm referenced, periodical evaluation of these students. While end of grade state testing will serve as a yearly performance indicator.

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

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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. Union Day School students who have been previously identified as eligible for special education services or have a 504 plan will be indentified via student enrollment information packet. The enrollment packet will include a, "Supplemental Registration Form," with the following questions:

* Does your child have a current 504 Plan?

* Does your child have a current IEP?

* Does your child receive classroom instruction in a small group setting with an additional teacher (i.e. Exceptional Child teacher)?

* Does your child receive any additional services (e.g. speech, counseling, hearing, visual, occupational therapy or physical therapy)? If yes, please list.

Parents will complete and sign the Supplemental Registration Form upon enrollment. A student can also be identified through the request of the students records from their previous school. Any records requests will include a request for grades, test scores, EC and/or 504 plan. The principal will forward any of this documentation to the EC teacher.

2. Union Day will prominently display all Child Find material throughout the school, but especially visible in the office. Additionally, we will place information on the schools website and provide parents with Child Find brochures yearly. Teachers will receive Early Intervention training to help identify any student with disabilities. Teachers can refer directly to the RTI team, but only after a personal education plan is in place or at the written request of the parent directly to the school. The intervention process will run concurrently with the EC evaluation process. Union Day will contract out with any needed service providers (e.g. OT, PT, Speech, etc) for the evaluation process. Once the evaluation process has been completed, the IEP team will assemble and determine the students eligibility. Any evaluations done by the parents provider(s) will be part of the eligibility process.

3. All student records, including those of students with IEPs or 504 plans will be housed in a locked file, in the EC teachers classroom. Student records may be viewed in this same secured location and may not be removed. Records request will be handled by the EC teacher. Staff members that will need a copy of the IEP for accommodation purposes (e.g. regular classroom teacher, special education teacher, related arts teachers) will be provided a copy and will be required to sign documentation stating they have read and understand the accommodations. The signed sheet should be returned to the EC teacher. All information concerning Union Day students will be in compliance with FERPA (Family Educational Rights and Privacy Act).

Exceptional Children's Education Programming

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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. Union Day School is committed to educating all of our students and helping them grow to their fullest potential. Research and best practices reflect that all students involved in the Least Restrictive Education (LRE) process benefit. Therefore, Union Day School will provide inclusion, when possible, in a range of ways (e.g. co-teaching, split schedule, consultative etc). As noted in the budget, a certified exceptional teacher will be hired to develop and help carry out the IEP for our students with disabilities. The EC teacher will serve as the head of the EC department of the school with additional EC teachers hired, if our enrollment reflects the need. Union Day School will contract with other professional service providers (OT, PT, Speech Pathologist, etc), as needed, by students with disabilities.

2. Union Day will provide staff development and training to assure our students with disabilities receive a Free and Appropriate Public Education, in the least restrictive environment, based on their IEP. In middle school, the principal, EC teacher, regular education teacher, and parents will work collaboratively in scheduling of the students classes. As always, the EC teacher will be responsible for making sure all state and federal guidelines are met, documentation kept and parents are involved throughout.

3. Implementation of the IEP, will be monitored by the EC teacher. The EC teacher will be responsible providing a copy of the IEP to needed teachers, scheduling meetings, and maintain parental communication. Union Day will contract with a professional service provider to observe and/or audit the school to determine that the IEP is being fully implemented, if needed.

4. Union Day School will contract with professionally licensed service providers (OT, PT, Speech Therapist, Behavior Therapist, etc), as needed, to support a students IEP or 504 Plan. Union Day will employ a part-time or full time service provider(s), if our enrollment reflects the need. The principal will be in charge of locating and hiring licensed service providers.

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. 1. In accordance with our mission, Union Day School will sustain a high

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level of student achievement. The school will adhere to the following grading scale for 3rd-8th grade students:

93-100 = A

92-85 = B

84-77 = C

76-70 = D

Below 70 = F/Failing

Students in K-2nd grade will be graded on an S = Satisfactory (at or above grade level) or N = Needs Improvement (not on grade level) scale for Reading and Math. Writing in these grades will be given a numerical score with expected ranges noted for parents. Progress reports will be sent home weekly with K-2 students and at interim reports will be sent home for 3-6 grades.

On average, Union Day School expects 70% of students in their first year of enrollment to score at or above grade level, 73% of students in their second year of enrollment to score at or above grade level, and 76% of students over three years of enrollment are scoring at or above grade level. 79%:year 4, and 82%:year 5

2. Union Day will utilize NWEA Measures of Academic Progress (MAP) testing will be conducted, in the Fall, Winter and Spring, to determine students progress through the year. MAP testing data will be analyzed to assess students progress, drive instruction, and determine any need for remediation. Fountas and Pinnell benchmark testing will be conducted three times a year with K-5th grades. All data from these F&P benchmark tests will be analyzed by teachers to determine a students reading instruction. Students with IEPs will be given an alternate assessment.

3. Students in grade 3rd-8th grade not receiving a yearly average of 70 or high in reading and math will not be promoted to the next grade. Students in K-2nd grade not reading on grade level or upon teacher recommendation (teacher must provide documentation to support retention recommendation) will not be promoted to the next grade. Parents will receive a copy of the promotion policy at the beginning of each school year. Fall and Spring parent-teacher conferences, progress (weekly for K-2nd) or interim reports (mid-term for 3rd-8th)will be sent home to keep parents informed of their students academic progress. Students with IEPs will be promoted based upon the recommendation of the IEP team.

4. Union Day School feels that students exiting our school we be well rounded, civic minded, independent and critical thinkers. Through the many community services hours students will have developed a sense of responsibility and pride in their community benefiting them socially and academically, as well. Our rigorous elementary curriculum will develop a strong foundation and successfully prepare them to transition into the IB Middle Years Programme. Existing Union Day School students will be outperforming the state and local average allowing them to be academically successful at any high school.

At Union Day School, it is a firm belief that we are responsible for education of all our students. We believe with the right support, all students can and will perform to high standards. As a result of this shared belief, we have developed a goal that at least 95% of students, with an IEP, will have met at least 85% of their academic goals. Knowing that students without a high school diploma will struggle in the future and have limited opportunities, Union Day will put mentors in place for our "At-Risk" students. We would begin the mentoring program (via Big Brothers, Big Sisters, Boys and Girls Club, etc) with these students, at least a year before their exit to help with student-mentor bonding. If necessary, we

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would establish a tutoring support system for these students through some of the above mentioned programs.

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.*

1. At Union Day School, we believe with engaging lessons, a climate of excellence, a positive nurturing environment includes a proactive approach to student discipline. We will be utilizing the Positive Behavioral Interventions and Supports (or PBIS) model of school wide discipline. At the start of school, students will be made aware of the school wide discipline expectations/rules. Union Day School staff, in partnership with parents, will reinforce these rules/expectations and routines to ensure students understand expectations are shared between school and home. As part of the PBIS model, Union Day School will teach and support decision making skills to all students, point out student models/examples of appropriate behavior and give praise for that behavior. Sometimes, it may be necessary to go beyond the PBIS primary level of prevention into the secondary level. At this level, students will get target behavior strategies to bring them back to the primary level of prevention.

2. The following are some offenses that will result in suspension or expulsion. For a full list, please, refer to the student handbook in appendix D.

- Threats intent to do physical harm to another student or staff
- Weapons possession-being in the ownership of any fire arm, knife, or explosive device
- Illegal substance possession- being in ownership of an illegal substance as defined by NC Law Enforcement
- Robbery-stealing school or private property
- Tobacco possession-being in ownership of tobacco or tobacco products

3. Discipline of students with disabilities that may lead to suspension will be in accordance with NC General Statue 115C-107.7. If an incident occurs where a student with disabilities must be suspended for more than ten days in the school year, Union Day School will act in accordance to NC General Statue 115C-109.6 to safeguard the rights of the student.

4. Union Day School students that have been suspended or expelled will receive written notification of discipline and may appeal to the principal within one full school day. Students may take their appeal above the principal to the Union Day School board of directors, in writing, and within

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five days of the suspension or expulsion. The Board of Directors will have the final decision within seven days of the receiving the appeal.

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Section III: Education Plan Concerns and Additional Questions		
<p>It is unclear why the names programs were selected. No information about the quality or success of any of the programs is presented, nor is information about the use of these programs with similar populations provided.</p> <p>It appears that the applicant may not understand the distinction between curriculum and standards. For example, in Social Studies, that applicant notes that a curriculum will supplement the standards, when one assumes, based on the brief description provided, it is actually meant to supplement a more comprehensive curricular program.</p>	Kristen Vandawalker	Instructiona
<p>The learning environment section is quite poorly written and difficult to understand. The rationale for having a 10:1 ratio for kindergarten and then moving immediately to 25:1 in kindergarten is unclear.</p> <p>What is the difference between teacher work days and PD days? the placement of these days makes little sense, and there are only four PD days for the whole year, which seems wholly inadequate.</p> <p>Appendix B appears to be little more than a copy of the table of contents for the various math textbooks.</p> <p>No actual instructional methodologies are named. NOTE: verify whether teacher compensation reflects required tutoring sessions and expectation that teachers will already be proficient in collects and analyzing student data, and then using their findings to drive instruction.</p> <p>The school calendar section makes little sense. What time does the school day start? End? What makes up the nearly 8 hours of instruction? How does the school day structure differ for various grade levels? How are primary grade students supported in meeting the mental and physical demands of a long school day? How does the school day align with other schools' start and end time? why would families not put all of their kids in the same school?</p> <p>What is an "out commute" and what is the significance of an 80% rate?</p>	Kristen Vandawalker	Curriculum a
<p>This section is wholly inadequate, and I'm not certain it rises to the level required to meet the law. There is no indication that the applicant understands the identification and monitoring processes, nor the scope of work involved in service students with exceptionalities.</p>	Kristen Vandawalker	Special Prog
<p>How will written requests for evaluation from parents be addressed? Why must a personal education plan be in place before a student is referred to special education?</p>	Carol Ann Hudgens	Exceptional
<p>1. Will the questions concerning if a student has a 504 or an IEP before they are accepted or after?</p> <p>2. Is the "Student Information Packet" or "Supplemental Registration Form" after acceptance? *** Those questions can not be on "an initial" application.</p>	Darrell Johnson	Exceptional
<p>As with the previous section, this section is egregiously underdeveloped and in some places the language makes no sense.</p>	Kristen Vandawalker	Exceptional
<p>This section is woefully underdeveloped. It is unclear whether the applicant understands how to ensure access to the general curriculum for students with special needs.</p> <p>Verify/; is the "EC teacher" actually a director-level role? does this teacher also carry a full classload?</p>	Kristen Vandawalker	Exceptional
<p>Please provide more details regarding the continuum of special education services to include separate settings, resource, and split schedule. Please describe the process for the development, the review and revision of IEPs.</p>	Carol Ann Hudgens	Exceptional
<p>this section is wholly inadequate and in some places the writing does not make sense. Will teachers, especially for primary grades, have time to prepare weekly progress reports for every student? this seems like a heavy lift. It is unclear what mentoring will add to the education of students with IEPs, and when it is implemented. How is it possible to map backwards from exiting as student? Does this just mean seventh grade, or does it mean exiting a student from sped services? Why do all students not get a mentor?</p>	Kristen Vandawalker	Student Perf
<p>The data feedback cycle for teachers is not detailed. Question for interview: please describe the feedback cycle.</p>	Kathryn Mullen Upton	Student Perf

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There is a brief reference to the IDEA, regarding discipline and students with disabilities. Question for interview: please describe how the school will handle suspension and expulsion of students with disabilities.	Kathryn Mullen Upton	Student Cond
Concerning the term "expelled", please note: 115C-390.11. Expulsion. (a) Upon recommendation of the superintendent, a local board of education may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff.	Darrell Johnson	Student Cond
This section is egregiously underdeveloped and does not demonstrate capacity to develop effective school culture. Is 10 absences really enough to retain a student? It's not super clear to me what the connections between offenses and consequences are. The length of the school day does not equal the length of the instructional day. Note that the previous "instructional" day is actually the school day.	Kristen Vandawalker	Student Cond
Response #3 does not reference the NC Policies Governing Students with Disabilities. For example, there are no references to manifestation determinations or the requirements regarding the provision of services.	Carol Ann Hudgens	Student Cond

Reviewer	Score
Cheryl Turner	
Carol Ann Hudgens	Fail
Kathryn Mullen Upton	Pass
Becky Taylor	
Helen Nance	
Alex Quigley	
Kristen Vandawalker	Fail
Darrell Johnson	Pass
Alan Hawkes	
Steven Walker	

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IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Union Day School, Inc

Mailing Address: 8111 Red Oaks Trail

City/State/Zip: Waxhaw NC 28173

Street Address: 8111 Red Oaks Trail

Phone: 704-989-4322

Fax:

Name of registered agent and address: Erin Kirkpatrick
8111 Red Oaks Trail
Waxhaw, NC 28173

FEDERAL TAX ID: 47-1782363

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)
X No

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

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

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?

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Celeste Slay	Secretary	UNION	Health and Wellness Coach		
Sam McNeil, Jr.	Treasurer	UNION	Finance & Business Consulting Professional		
Maura MacKinnon		UNION	Library Information Specialist		
Joely B. Lord	Vice-Chair	UNION	Education Media Specialist		
Mark Brody		UNION	NC State Representative/Self-employed Contractor		
Chris Bernard		UNION	Attorney at Law		
Erin Kirkpatrick	Chair	UNION	Healthcare Practice Manager		

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.*

Union Day School will commence with a Board of Directors, including a Chairperson, a Principal, Appropriate Senior and Administrative Staff, Teachers, and Appropriate Teaching Assistants. As required, the school will add additional Senior and Administrative Staff, Teachers, Teaching Assistants, and Support Staff. It is also contemplated that a Parent Advisory Council will be formed and a Teacher Representative will be selected to advise the Board of Directors directly. The Board of Directors will also enlist the help of various area-specific advisors, as necessary.

The Board of Directors, at the direction of the Chairperson, will report to the State Board of Education and be responsible for all charter issues, legal compliance issues, the provision of adequate facilities and equipment, the appointment and employment of a Principal, the approval and employment of Senior and Administrative Staff, budgetary and financial approval and management, school calendar approval, and all other duties provided by law. The Board of Directors shall be selected and act in accordance with the Bylaws, shall disclose all potential conflicts of interest as required by law, and shall act in accordance with the Open Meetings and Public Records Laws at all times. Above all, the Board of Directors will act in the best interests of the school, its employees, its parents, and its students such that its purposes under its charter are furthered.

The Principal will report to the Board of Directors and will be responsible

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for the day-to-day operations of the school. This includes, but is not limited to, preparing and recommending budgets; approving and modifying the schools curriculum; student health, safety, and welfare; managing the schools employees; and interfacing with and advising the Board of Directors related to anything that falls within their purview.

Senior Staff will eventually include an Assistant Principal, a Finance Officer, an Information Technology Officer, a Head of Curriculum, a Director of Special Programs, a Facilities Manager, and the like, as appropriate.

It is envisioned that the Parent Advisory Council, selected from and representing the schools parents and guardians, will assist the Board of Directors in establishing and maintaining educational and extracurricular programs and activities within the school that will enrich student education and life. This group will be invaluable in assisting the Board of Directors in fixing problems as well, helping to make Union Day School a preeminent charter school.

Likewise, it is envisioned that the Teacher Representative, selected by the Principal, Teachers, and Teaching Assistants, will provide the educational staff at the school with an open communication channel to the Board of Directors at all times, such that the needs of the educational staff and students will be met at all times.

Union Day School clearly favors a teamwork atmosphere and will strive to avoid a top-down management approach, fostering the participation and creativity of all of its stakeholders.

- 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 number of Directors on the board shall be seven to nine and at least one member shall always be a parent of a currently enrolled student(s) of Union Day School. Currently the board consists of seven members with a diverse set of skills adding to the value of perspective and governance. Erin Kirkpatrick, brings a vast background consisting of, but not limited to, the Waxhaw local political level, a municipality within Union County. As the highest vote receiving elected official in the history of the township, she has served successfully a four year elected term on the town council affecting positive change, enacting ordinances, and upholding policies in a transparent manner. Two years of her term were served appointed as Mayor Pro-Tempore which consisted of Mayoral duties in the absence of the Mayor such as presiding over Town meetings under Robert's Rules of Order. Ms. Kirkpatrick has also successfully co-founded and served on the board of a non-profit fiscally sound organization to raise funds for the expansion of the second highest utilized library in Union County. Chris Bernard is a resident of Union County and is a practicing attorney in Charlotte. Mr. Bernard possesses a Bachelor of Science in Aerospace Engineering and a Juris Doctor. With 12 years prosecution experience in the Electrical and Mechanical arts, Mr. Bernard brings a unique and valuable skill-set essential to Union Day School. Representative Mark Brody is currently serving in the North Carolina House of Representatives for District 55 which consists of Anson and Union Counties. His vast knowledge and experience with

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NC State Legislature, education, state committee involvement, and Rules & Proceedings gives the Union Day School Board of Directors great oversight and insight. Representative Brody is passionate about education and affecting positive change for the entire State of North Carolina and its residents. He believes strongly in parents having the choice for age-appropriate rigorous curriculum for their children. Joely Lord resides in Wesley Chapel and possesses a Bachelor's of Arts in Early Childhood Education and a Master's in Library and Information Science degrees. Mrs. Lord, resides in Union County, NC and is currently employed as a Library and Media Specialist for York County Public Schools. Her role consists of performing administrative duties of the library, supervising media center staff, planning and implementing lessons to support curriculum standards for research and information technology, and maintaining a library budget. Ms. Lord's role as a First Grade teacher for twelve years also contributes greatly to the UDS BOD through her hands on experience of diverse learning styles and speeds children may possess. Her experience with various curriculum is invaluable to Union Day school and her 21 years of educational experience is essential. Maura MacKinnon resides in Wesley Chapel and possesses Bachelor of Arts with a Major in Fine Arts and a Master of Arts in Teaching Specializing in Secondary Education, English 7-12. Mrs. MacKinnon also holds a North Carolina Standard Professional I License. With a collective 17 years of educational experience, Mrs. MacKinnon has held positions as Teacher, Advisor, Director, Student Teacher, Classroom Observer, and Curriculum Coordinator. Sam McNeil, Jr., resides in Weddington and is a Finance and Business Consulting Professional with 26 years of experience assisting organizations with complex matters including reporting, growth, HR, regulatory compliance, strategy, planning, and execution, all of which, are invaluable to UDS BOD. Mr. McNeil's education includes BS in both Finance and Marketing along with an MBA in Finance. Celeste Slay resides in Waxhaw with her husband Tamar Slay and two children. She is prospective UDS parent and currently a professional health and wellness coach. Having lived in numerous countries, she has experienced a wide variety of curricula and schools.

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

The current members of the board of directors are comprised of individuals who became familiar with one another through a variety of community efforts and interests surrounding education both on the local and the state level throughout the past year and a half. Each member expressed interest in serving the community collectively and as a whole believing in the need of curriculum and school choice for parents and children. Together, the directors' skills, expertise, and experience evolved into Union Day School, with a specific mission in mind, to improve the lives of a wide variety of children, obtainable by the work of the whole. Believing collectively in supporting children to discover their personal talents, the directors believe a child should not be held back by being a victim of circumstance but should instead, be afforded opportunities to excel, realize their personal self worth through a supportive environment made up of positive mentors, and come to lead the communities they are a part of thereby, living fulfilling lives. Children who may miss a critical skill for one reason or another should not be haunted throughout their lives and repressed. The board of directors individually and collectively believe in teachers engaging and inspiring children to learn. SO, the collective belief drew our

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board members together. And so, the prospective school, Union Day, emerged.

Any vacancies on the Board of Directors shall be filled by a simple majority vote of the remaining Directors at any meeting. A good faith effort will be made to fill a board vacancy, having less than seven members, with a qualified candidate within sixty (60) days.

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

Meetings

Regular Meetings of the Board of Directors shall be held monthly at a time and place designated by the Board of Directors. A 12 month calendar of monthly meetings will be adopted during the annual meeting occurring in June of each year to commence in the following month of July.

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).

Onboarding of new board members will consist of the following during the first 60 days:

Ethics and Conflict of Interest Training

Open Meetings and Public Records Law Training

Receiving a Copy of Roberts Rules of Order

Receiving a Copy of the Most Current Handbooks and Policy Manuals

School Tour with introduction to every staff member

Parents Commission Meeting Attendance (1)

Classroom Observation (1)

Ongoing Board Training will consist of Annual Goals Workshop Required Attendance and the Annual Board Building Retreat. Ethics and Conflict of Interest training updates will be provided as needed along with any NC Applicable Law to Union Day Charter School.

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.

Conflict of Interest If a matter before the board places a director in a conflict of interest between the interests of the corporation and the interest of the director, or the directors family or business, the director shall inform the Board of Directors. The director with the conflict shall be prohibited from participating in discussions and votes on that matter. Each director shall sign a conflict of interest policy that shall be kept on file at the principal office of the Corporation. Each director will complete a conflict disclosure form upon initial appointment and be required to update as necessary.

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

Any director may motion to create, modify, or change a policy during the regular scheduled monthly meeting after having been properly placed on the agenda. The Principal and Department Directors may also make requests for consideration by properly placing an item on an upcoming agenda. During the Board of Directors annual meeting, a date for a Goals Workshop will be chosen. Each School department head and the principal may submit policies for review and consideration.

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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.*

It is envisioned that the Parent Advisory Council, selected from and representing the schools parents and guardians, will assist the Board of Directors in establishing and maintaining educational and extracurricular programs and activities within the school that will enrich student education and life. This group will be invaluable in assisting the Board of Directors in fixing problems as well, helping to make Union Day School a preeminent charter school.

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

During the academic year problems and misunderstandings between students, parents, and teachers may arise. The best way to resolve these problems is to keep an open, yet orderly channel of communication between all parties. The following is a strategy that will allow an open channel of communication between parents and the staff of Union Day School.

The following steps are critical in maintaining a sense of discipline.

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 from the NC Department of the Secretary of State. (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

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Projected Staff:

Outline below, 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.

The anticipated staff for Union Day will be as follows:

Year one: principal, operations and finance officer, administrative assistant, 13 classroom teachers, one EC teacher and five teacher assistants. All of these positions will be full-time employees. The following will be part-time year one: one EC teacher, five special area teachers (art, music, PE, foreign language, librarian), and custodian.

Year two the following positions will be added: assistant principal, and three classroom teachers; all full-time. The special area teachers will be made full-time employees, as will the custodian, and the one part-time EC teacher (total of two full-time EC teachers).

Year three: Three full-time classroom teachers will be added, as will a full-time administrative assistant, and another part-time EC teacher.

Year four: One full time administrative assistant will be added, four full-time classroom teachers, and one special area teacher. The year three part-time EC teacher will be made a full-time employee.

Year five: Three full-time classroom teachers will be added and a part-time EC teacher.

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

Union Day will strive to seek only highly qualified teachers that share in our mission to provide students with a rigorous, content-rich, high quality education. We will recruit teachers using a variety of avenues: print advertisement, college recruitment fairs, school's webpage, internet advertisement and social media. We have already received several resumes from teachers via social media.

It is our belief, that when teachers feel they are valued and appreciated for their hard work, they will excel. Teachers need reasonable autonomy to use their expertise to do what they love, plan for and to teach children. Teachers feel rewarded watching children grow. Union Day School's children will grow academically, socially, and emotionally. Within the K-8 culture comes the sense of belonging which holds true for teachers as well as children. We also believe seeing and expressing the value of our teachers will aid with retention. We believe that the competitive pay will also retain quality teachers. Union Day School is attune to the value of teachers and believe in reinforcing teacher value on many levels.

Union Day School will cultivate a culture of respect for all.

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

Board Authority and Duties

Union Day School, Inc. Board of Trustees is a body corporate and has general control and supervision of all matters pertaining to the schools. The Board will establish general policies in keeping with the needs of the community and the requirements of state law and perform all specific duties imposed by law. The Board considers some of its most significant duties to be the following:

1. Providing leadership and direction through the formulation of goals and

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objectives, especially in defining and setting high academic standards for student success;

2. Creating policies that establish standards, accountability and evaluation of essential operations of their schools;

3. Taking steps necessary to help ensure legal compliance of Board and school functions.

Administration

The principal reports to the Board and is responsible for administrative operations in accordance to the Boards overall vision, and serves as the educational leader of the school. The principal administers the school according to the policies set by the Board.

All employees, of the school, report to principal/administration. The principal is the only employee that reports directly to the Board and in the event of a grievance the board will act in accordance to policy.

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

Staff will be hired by school administrator/principal in accordance with the requirements of positions, budgetary guidelines and school need.

Dismissal of staff, with cause, will follow the guidelines for reviewing a teacher as outlined in our professional development plan and the policies and procedures outlined in the personnel handbook. All staff, regardless of position, are provisional for the first year of employment.

Criminal History Check

All schools under the direction of the Board will be required to follow all adopted policies regarding criminal history checks of the local education agency in which the school resides pursuant to G.S. 115C-238.29F(e1).

Equal Employment Opportunity

The School is an equal opportunity employer and provides employment without regard to race, color, religion, national origin, sex, age, or handicap, except where sex, age or physical requirements are essential occupational qualifications.

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

Proposed Salary Range-

Principal \$75,000-\$87,500

Assistant Principal \$60,000-\$66,800

Operations and Finance Officer \$39,000-\$45,600

Administrative Assistant \$28,000-\$33,700

Custodian \$20,000-\$34,000

Core Teachers \$42,000-\$50,000

Exceptional Education Teacher \$42,000-\$48,600

Special Area Teachers (Part-Time) \$20,000-\$28,000

Special Area Teachers (Full-Time) \$40,000-\$45,000

Teacher Assistants \$30,000-\$35,000

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All full-time employees of Union Day School will receive health insurance, life and disability insurance, and a 401K retirement plan.

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

Grievance Procedure for Employees

It is the policy of the board, in keeping with the ultimate goal of serving the educational welfare of children, to develop and practice reasonable and effective methods of resolving difficulties that may arise among employees. The intent is to reduce potential areas of grievances and to establish and maintain recognized channels of communications between staff and administration.

The purpose of this procedure is to secure, at the lowest possible level, equitable solutions to the problems that arise from time to time and affect employees. The procedure in its entirety is in the employee personnel manual.

If an employee has a grievance against the school administration, they would then follow the policy to report such dissatisfaction to the Union Day School Board of Directors.

If the grievant has alleged a violation of a specified federal or state law, federal or state regulation, State Board of Education policy or procedure, or board policy or procedure or has alleged that a specific decision of a school official adversely affects the grievant's employment status or the terms or conditions of his or her employment, the grievant shall have a right to appeal a final administrative decision to the board of education (see subsection E.4.a, Mandatory Appeals, below). If the grievant has not alleged such specific violations, he or she may request a board hearing, which the board may grant at its discretion (see subsection E.4.b, Discretionary Appeals, below).

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

Not Applicable. Union Day School will not have any dual positions.

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 believe it is our responsibility to hire highly qualified teachers for all positions. We will target and recruit with this goal in mind. We have allocated a budget, starting year one, that reflects our commitment to serving our EC population. Being uncertain of our actual ELL population, we will hire staff or service providers for these students based on population needs. We believe that the rigorous, content-rich curricula at UDS will address the needs of our gifted students.

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).

UDS will seek to hire highly qualified teachers for all teaching positions. General qualifications for teachers will include: NC Standard Professional 1 Professionals (SP1) someone that has completed a teacher education program, from an accredited college, and has 0 to two years teaching experience or NC Standard Professional 2 Professionals (SP2) the same credentials as SP1, but with three or more years teaching experience. Teachers are responsible for implementing the curricula, classroom management, planning field studies, after school tutoring, maintain student record, analyze test data, and other duties as directed by the principal.

Exceptional Education teacher will be an SP1 or SP2 provide direct

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instruction to EC students (if applicable), provide case management of EC students, develop, implement, update, and review IEPs, maintain student records in accordance with state and federal education statutes, communicate progress to parents, and provide EC staff development (if applicable).

Principal will preferably hold a masters degree in educational leadership, from an accredited university, but can be an SP2 with more than 10 years teaching experience. The principal will be required to plan professional development, manage the implementation of the curriculum, oversee and manage staff, recruit and evaluate teaching staff, oversee contracted service providers (for EC and ELL students), and implement state mandated testing. Teaching assistants will preferably have at least two years of college experience and more than a year of TA classroom experience, but will require a minimum of a high school diploma. The TA will support the classroom teacher, manage classroom, perform any necessary clerical duties, and other duties as directed by the principal.

Administrative assistant will hold, at a minimum, a high school diploma and more than a year of clerical experience and possess good communication skills. Preferably, the administrative assistant will have experience in a school setting. The administrative assistant will be in charge of running the schools office, answering calls, performing daily clerical work, and other duties as directed by the principal.

Staff Evaluation and Professional Development

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

The Principal will oversee the professional development plan and licensure of all educational staff members.

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.*

As teachers come with varying levels of education and experience, we will team up new teachers with veteran staff to provide a mentor atmosphere. This model will ensure that teachers have an outlet to manage everyday challenges and know that they are part of a greater whole that truly supports their profession. Teams will meet at least twice monthly to discuss and plan pacing, assessments, policies, programs and other related topics.

Teacher evaluations will follow the recommendations for North Carolina Public Schools as written in the North Carolina Teacher Evaluation Process, (State Board of Education Department of Public Instruction revised 2012). The evaluation will include the rubric for evaluating teachers, supporting artifacts, test scores and observation completed throughout the school year. A final end of year summary and rating form will be completed with goals for the following school year. A survey will also be sent to the parents of the students in the teacher's current class. This will provide key input from the parent perspective.

3. *Describe the core components of professional development plan and how these components will support effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.*

Professional development at UDS will support the schools mission of rigorous, content-rich environment, and achieving high academic success for

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all of our students. Teachers will be given needed professional development, at the beginning of the year, on how to implement any new curricula or teaching methods. EC professional development will be provided, as needed.

The professional development plan for UDS teachers will be internally driven but not limited to internal resources. All teachers are responsible for keeping their license in good standing. Any needed professional development identify through the teacher evaluation process, will be arranged by the principal. At UDS, we believe that professional should continue to grow professional and we will support any external professional development.

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

Before the start of the school year, the staff development program will provide teachers with an opportunity to design their goals, objectives, and address curricula challenges. New teachers will have one extra orientation day before the other teachers begin their school year. As a whole team, there will be one professional development time before school starts in which to cover all regulatory requirements, school specific goals and as previously stated personal professional goals for the year.

Year one, teachers will need training on Handwriting Without Tears and Singapore Math. Both training sessions are approximately half a day each and will be done before school begins. Singapore math training will be provided by a third party, the first year, and will cover implementation of the curriculum. After year one, any implementation of the Singapore Math curriculum will be done in-house. Professional development on the implementation of Handwriting Without Tears will also be done before the start of year one. It will be provided by the company the first year and by staff, as needed, in subsequent years. Year four, middle school teachers will be required to do IB Middle Years Programme training. This will be provided and scheduled by International Baccalaureate.

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.

A projected timeline for Union Day School Professional Development Activities is as follows:

Staff Orientation	1 Professional Day before school opens
Departmental meetings	Once a month
Grade Level Meetings	Once a month
Professional Development Days	2 per semester
Year end meetings	2 Days after dismissal
Conference workshops	As needed

Teacher work days are mandatory and are worked into the instructional calendar prior to the start of school. Charter school conferences, workshops, exchange teaching, as well as other teacher related conference and professional opportunities are planned to be available to teachers and academic staff throughout the school year contingent upon the teacher/school needs and available resources.

Enrollment and Marketing:

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- 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 reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).

We at Union Day School desire to have a student population that is a direct representation of the demographics of Union County. Our goal is to pull students from Eastern as well as Western Union County. In doing so we will be able to reach students and families from varied learning communities creating a diverse student body made up of different economic, geographic, and ethnic groups.

Union Day School Board of Directors will continue to reach out to the community of parents and students using various means of marketing strategies. Some of our plans include the following:

- ~Networking and word of mouth through board members' contacts, colleagues, and religious communities.
- ~Growing and developing Union Day Schools' social networking reach by including a website, Facebook, Twitter, Instagram, and Linked In.
- ~Press Release for multicultural TV, radio, and local newspapers.
- ~Brochures, TV/radio ads, and flyers with school information and meeting dates.
- ~Participating in local community events such as parades and festivals for families.
- ~Partnering with local community sponsors such as- Pediatricians, pediatric dentistry, and urgent cares in the area.
- ~Working with and distributing brochures to local businesses, as well as learning centers, day-care centers, community centers to promote Union Day and disburse information.
- ~Hold informational meetings at different venues within the community.

Marketing Timeline and Details will be as follows:

Summer-Fall 2014:

Over the next months we will continue share information about Union Day School with friends, family while expanding our social media. We will continue to manage our Facebook account and create a Twitter and Instagram account. We will distribute brochures and informational flyers with Union Days mission and vision statements. Set future dates and hold informational question and answer sessions with key community leaders and groups. Execute press release and all media prospects like local multicultural TV, radio, and newspapers.

Winter-Spring 2015

Continue to update website, and all social media outlets. Participate in

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parades and festivals. Create media buzz within communities that have yet to be reached. Hold events and invite media to cover events.

Summer-Fall 2015

Redistribute flyers and informational brochures. Update all social media with open house dates. Create relationships with other charter schools in and effort to help charter school student participation.

Winter-Spring 2016

Continue to boost interest in the school and its opening. Host several open houses and hone in on areas with fewer student applications.

Summer-Fall 2016

Reach out to local magazines and newspapers to confirm that we are added to the local school listings in their education issues.

Update news outlets with schools opening date. When the school opens hold a ceremony to celebrate the schools opening. Order promotional t-shirts, decals, and any other marketing items.

Fall 2016

Student orientation and Union Day Charter School opens.

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.*

1. At Union Day School we believe that parent and community involvement is key to the success of the school and the children it serves. By working hand in hand with parents, we believe we can build the Union Day School family. We want to give back to the community as well as helping each and every student achieve greatness. This can only be done if we work as a cohesive unit. We plan on building long lasting relationships within the community and neighborhood through community centers and other institutions. We feel this will help give each and every student the opportunity to achieve academic greatness.

2. To engage parents the Union Day School process will begin after the application process is complete. We will host orientation night for parents and students where we will outline our plans for the school year. This is done so parents can plan for the year accordingly.

Shortly after the school year begins we will hold a curriculum night. This will allow parents the opportunity to meet the teaching staff at Union Day School. Teachers will outline the curriculum for the school year and help them understand what their children will be learning and when. Each teacher will explain the parent involvement expectations such as homework review, communicating on a regular basis with the teacher, soliciting parents for volunteer positions through sign up sheets, and welcoming parents to join their children for lunch during the school day.

To help foster the family and community relationships, Union Day School will

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offer many opportunities for parents to get involved in the school activities.

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.*

#1 Open Enrollment shall begin January each year or upon approval, continue for minimum 30 days. Within two weeks the Public Lottery will occur; Invitations will be mailed within 3-5 business days and enrollment responses due within(10)calendar days. #2 UDS will admit a rich and diverse student body in full compliance with all State and Federal Laws, as outlined more specifically in N.C.G.S. 115C-238.29F(g) . In general, any child who is qualified under the laws of this State for admission to a public school is qualified for admission to UDS. Admission to UDS shall not be determined according to the local school attendance area in which a child resides. UDS shall not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. UDS shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry. It is the goal of UDS that the population of the school reasonably reflect the racial, ethnic, and other composition of the general population residing within the local school administrative area in which the school is located. UDS reserves the right to give enrollment priority to any child covered by N.C.G.S. 115C-238.29F(g). Such enrollment priority may include: the siblings of currently enrolled students who were admitted to UDS in a previous year, including half-siblings, stepsiblings, and foster children residing in the same household; the siblings of students who have completed the highest grade level offered by UDS and who were enrolled in either four or the maximum number of grade levels offered by UDS; the children of the school's full-time employees (not to exceed 15% of total enrollment); for its first year of operation, the children of the initial members of the board of directors (not to exceed 15% of total enrollment); and a student who was enrolled in UDS within the two previous school years but left the school (i) to participate in an academic study abroad program or a competitive admission residential program or (ii) because of the vocational opportunities of the student's parent. Multiple birth siblings shall be given enrollment and lottery priority in accordance with N.C.G.S. 115C-238.29F(g). #3 During each period of enrollment, UDS shall enroll any eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, grade level, class, or building. In this case, students shall be accepted by lottery. Once enrolled, students are not required to reapply in subsequent enrollment periods. If siblings apply for admission and a lottery is needed under

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N.C.G.S. 115C-238.29F(g)(6), UDS may enter one surname into the lottery to represent all of the siblings applying at the same time. If that surname of the siblings is selected, then all of the siblings shall be admitted to the extent that space is available and doesnot exceed the grade level capacity. If multiple birth siblings apply for admission and a lottery is needed under N.C.G.S. 115C-238.29F(g)(6),the charter school shall enter one surname into the lottery to represent all of the multiple birth siblings applying at the same time. If that surname of the multiple birth siblings is selected, then all of the multiple birth siblings shall be admitted. #4 Per statute, prior to admittance, in a timely manner, accepted students will be required to (1)document all health requirements mandated by the State of North Carolina,(2)acknowledge and agree to the mission and policies of UDS, (3)submit to placement exams to determine grade level (if appropriate), (4)supply a transcript of grades and standardized test scores from the students current or prior school and, (5)certify the student has not been expelled from the current or prior school and is not presently serving a suspension. #5 See Student Handbook for student withdraw and transfer policies.

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PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Union County Public Schools
 LEA #2 Charlotte-Mecklenburg Schools
 LEA #3

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.

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000	LEA 900	LEA 600	LEA 000
Kindergarten	95	5	0	95	5	0	95	5	0	95	5	0	95	5	0
Grade 01	68	7	0	95	5	0	95	5	0	95	5	0	95	5	0
Grade 02	68	7	0	68	7	0	95	5	0	95	5	0	95	5	0
Grade 03	68	7	0	68	7	0	68	7	0	95	5	0	95	5	0
Grade 04	0	0	0	68	7	0	68	7	0	68	7	0	95	5	0
Grade 05	0	0	0	0	0	0	68	7	0	68	7	0	68	7	0
Grade 06	0	0	0	0	0	0	0	0	0	68	7	0	68	7	0
Grade 07	0	0	0	0	0	0	0	0	0	0	0	0	68	7	0
	299	26		394	31		489	36		584	41		679	46	

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Section IV: Governance and Capacity
Concerns and Additional Questions

Reviewer

**Page
Reference**

Reviewer

Score

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V. OPERATIONS

Transportation Plan:

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

Union Day School's Transportation Plan is designed to ensure ready and safe access to the school for local area students who would not otherwise be able to attend Union Day School. All legal and regulatory requirements for student transportation will be adhered to, and Union Day School will not deny access to any local area student due to a lack of transportation.

We have budgeted over \$20,000 in Year 1 for transportation needs, which would primarily be used for contract outsourced transportation, including buses and transit vans. Presently Union Day School does not intend to acquire buses, transit vans or other transportation vehicles, but we will closely monitor student needs and regularly evaluate whether the school should acquire transportation vehicles. There may also be future opportunities to partner with the Union County Public School System ("UCPS") regarding utilization of their vehicles, with fair and requisite compensate to UCPS in return.

Specific aspects of the Union Day School Transportation Plan include establishing the school in a location that offers convenient and ready access. Our intention is to locate our physical facility in reasonably close proximity to both parent workplaces and commuting arteries, which will enable many parents to conveniently transport their children to school. This will also enhance parent's efforts to carpool while we have not yet secured a physical facility, all of the facilities being considered offer relatively convenient transportation choices. By establishing a convenient location and consolidated key cluster meeting points, Union Day School will also foster transportation choices that result in driving fewer miles, and thus use less fuel and conserve natural resources. In general, this will also make the school readily accessible to students, parents, teachers and staff promoting quality of life.

Another important element of our Transportation Plan is having staff, teachers and parents work closely together to organize carpools, and to encourage ridesharing initiatives. We will consider establishing a formal Carpool Committee composed mostly of volunteer parents, but at the very least the school will strongly encourage carpooling. Over time, we will consider establishing an online carpooling system that will enable parents to quickly and conveniently coordinate their efforts.

With this, Union Day School is extremely mindful of establishing and maintaining a facility that provides a safe environment for all of the schools stakeholders, and our Transportation Plan is very important in this regard. Student safety is of utmost importance. For example, any students that walk to school will be provided with proper pedestrian crossings, and we will potentially utilize crossing guards and qualified volunteers to assist with school area traffic and ensure the safe movement of students.

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Union Day School will also consider distributing a transportation survey to parents, teachers and staff in order to better understand our stakeholders transportation needs. Based on this and other information, we will thoroughly evaluate transportation needs at least annually.

Every reasonable effort will be made to provide an environment for parents to make transportation choices that are safe for students; conserve natural resources; are convenient for students, parents and school personnel; and ensure Union Day School will be a good neighbor in our community.

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.

Union Day will utilize its lunch program to teach concepts and skills around sustainable local food sourcing or "Farm to Table," while building nutrition and healthful eating habits. Agriculture plays a huge part in the economy of our area and we intend to partner with local farms within the community. Union Day School will work with our local organization/vendor to provide lunch at a fixed cost (through monthly meal plans) to our students. We will negotiate for a contract with the organization to retain a percentage of the sales of such meal plans in order to provide lunches free of cost or at a reduced cost to those students who meet the guidelines for free and reduced lunch in public schools until we are able to qualify for a Federal or State program. Thereafter, we will apply the same approach to providing snacks and other energizing foods at scheduled intervals to help children maintain focus on education. We are in the process of partnering with the National Farm to School Program in North Carolina. Farm to School will help bring fresh local food to our school cafeteria. Other options for organizations that supply sustainable local fresh foods are Simply Fresh to You and Good Kitchen. Union Day School intends on applying for the USDA "Farm to School" grant.

During our first and possibly our second year, if necessary, we will contract with an outside catering vendor to deliver our meals. Menus will be available one month in advanced for ordering. The same terms mentioned above will be pursued.

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)
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Comprehensive General Liability		\$1,000,000	\$1,544.00
Officers and Directors/Errors and Omissions		\$1,000,000	\$3,332.00
Property Insurance		\$450,000	\$675.00
Motor Vehicle Liability		\$1,000,000	\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other		\$1,000,000	\$7,012.00
Total Cost			\$13,076.00

*The applicant must provide a quote from an insurance provider as part of this application (as Appendix P) 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.

udscharter 09/21/2014

(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 Q).

As we evaluate facility options, we are mindful of considerations regarding energy use and efficiency, and we will seek to ensure that our facilities are environmentally friendly and sustainable. We will also be mindful of the nearby neighborhoods and communities, and the importance of our facility comfortably fitting in with our surroundings.

We are presently evaluating several facility options. We anticipate our initial (first 1-3 years) student headcount to be approximately 450-525 students, so it is imperative that we secure a facility with ample space for all students, teachers and staff.

Specifically, we are having discussions with a major multi-site local church organization that is building a new campus in Union County. One of our Board

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Members is highly active in the church, and the church has expressed interest in erecting a building that Union Day School would lease a portion of. These discussions presently center around Union Day School occupying a new building of approximately 40,000 square feet, with the building being in compliance with all regulatory and safety requirements. Our preference is to initially lease the facility since that would avoid taking on any debt, and thus ensure financial strength and discipline by carefully managing cash expenses.

We are also evaluating various real estate properties in Union County for suitability and availability both raw land and existing buildings that could be converted to a school. We have identified several sizable land parcels that are in close proximity to major thoroughfares, and are also near many well populated and growing neighborhoods. In this situation Union Day School would probably purchase land and construct a new facility, although there may be specialty charter school funding groups or other organizations that would be willing to purchase the facilities and enter into a "sale/leaseback" arrangement. Approval of Union Day school is essential to firm contract negotiations.

The Board of Union Day School has a large network of contacts that is involved in local real estate. We are taking full advantage of this network to learn about and discuss alternatives, optimize our awareness of viable and attractive facility options, and minimize our costs while providing a facility that is highly functional and desirable.

Our final decision regarding a facility will carefully take into account the schools fiscal situation, and our ability to meet the financial obligations of acquiring and operating our facility. We are conscious of the dangers of overextending. Our evaluation process is centered around balancing the needs of the students, teachers, parents and staff, while also preserving the financial strength and integrity of the school.

What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

We have budgeted \$15 a square foot for an initial needed 22,000 square feet. Commercial rental property ranges from \$18/ft. in the west, to \$15/ft. in the Indian Trail area, to \$10/ft. in Monroe and east.

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 the previously mentioned alternatives do not come to fruition, then we have two primary contingency plans.

First, there are over 40 churches in our target geographic area, and many of these churches have significant unoccupied or underutilized buildings and/or land. We would embark upon intensive research of these churches and engage our extensive network of local contacts to determine available options with them.

Our lowest priority option would be to purchase and/or lease mobile

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classroom units from established, well regarded companies such as Williams-Scotsman, Mobile Modular, ModSpace, PacVan, FaberSpecialty, and/or another credible vendor, and locate them on land that the school would probably initially lease. The number and size of modular classroom units would be determined by student enrollment.

Our initial cost estimates for mobile units are as follows:

Portable trailers for schools can be leased for \$100-\$600 per month or purchased from \$10,000-\$50,000; delivery and setup can cost \$1,000 or more; modular portable classrooms sell for about \$40-\$200 per square foot, depending on the size of the building and the level of customization required.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
There is no evidence that \$20k is reasonable or adequate to cover any kind of meaningful transportation plan, especially without a location for the school. Additionally, it is important to note that the student handbook discusses a busing plan, which the applicants probably should have addressed here. There is no evidence that the applicant has given more than passing attention to transportation.	Kristen Vandawalker	Transportati
Transportation plans do not include "special transportation" that may be required as a related service in the individual education program of students with disabilities.	Carol Ann Hudgens	Transportati
The \$20,000 noted in the narrative seems low for transportation. Additionally, the operations budget shows transportation projections of \$36,000. Question for interview: which figure is correct? If the school will rely in part on car-pooling, delegating this critical service to a volunteer organization for a 700+ student school may not be the most effective way to ensure that all students have access to transportation. Question for interview: why the decision to delegate?	Kathryn Mullen Upton	Transportati
there is no actual plan present.	Kristen Vandawalker	School Lunch
Food costs were not included in the operations budget.	Kathryn Mullen Upton	School Lunch
The facilities plan is not well developed; there is not a contingency plan.	Kathryn Mullen Upton	Facility and
There is no evidence of any actual plan to acquire a facility, nor evidence that they applicant has done any legwork on this front.	Kristen Vandawalker	Facility and

Reviewer	Score
Cheryl Turner	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Helen Nance	
Alex Quigley	
Kristen Vandawalker	Fail
Darrell Johnson	Fail
Alan Hawkes	
Steven Walker	

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VI. FINANCIAL PLAN

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

Budget: Revenue Projections from each LEA 2016-17

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

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

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

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

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

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1900 - Union County Public Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,546.19	299	\$1,359,310.81
Local Funds	\$1,943.00	299	\$580,957.00
Federal EC Funds	\$3,768.11	36	\$135,651.96
Totals			\$2,075,919.77

LEA #2600 - Charlotte-Mecklenburg Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,505.20	26	\$117,135.20
Local Funds	\$2,318.40	26	\$60,278.40
Federal EC Funds	\$3,768.11	3	\$11,304.33
Totals			\$188,717.93

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Total Budget: Revenue Projections 2016-17 through 2020-2021

INCOME: REVENUE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
-State ADM Funds	\$1,476,446	\$1,934,144	\$2,398,338	\$2,854,022	\$3,310,666
-Local Per Pupil Funds	\$641,235	\$840,018	\$1,041,622	\$1,239,530	\$1,437,855
-Exceptional Children Federal Funds	\$146,956	\$192,512	\$238,715	\$284,071	\$329,522
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$2,264,638	\$2,966,674	\$3,678,675	\$4,377,623	\$5,078,043

***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 S.

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Personnel Budget: Expenditure Projections 2016-17 through 2010-2021

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	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:															
Principal	1	\$75,000	\$75,000	1	\$80,000	\$80,000	1	\$82,500	\$82,500	1	\$84,900	\$84,900	1	\$87,500	\$87,500
Assistant Principal	0	\$0	\$0	1	\$60,000	\$60,000	1	\$62,500	\$62,500	1	\$64,300	\$64,300	1	\$66,800	\$66,800
Operations & Finance Officer	1	\$39,000	\$39,000	1	\$41,000	\$41,000	1	\$43,000	\$43,000	1	\$44,000	\$44,000	1	\$45,600	\$45,600
Administrative Assistant	1	\$28,000	\$28,000	1	\$30,000	\$30,000	2	\$31,000	\$62,000	3	\$32,500	\$97,500	3	\$33,700	\$101,100
Custodian Part Time	1	\$20,000	\$20,000	0	\$0	\$0	0	\$0	\$0	1	\$20,000	\$20,000	1	\$22,000	\$22,000
Custodian Full Time	0	\$0	\$0	1	\$30,000	\$30,000	1	\$32,000	\$32,000	1	\$33,000	\$33,000	1	\$34,000	\$34,000
A - Total Admin and Support:	4		\$162,000	5		\$241,000	6		\$282,000	8		\$343,700	8		\$357,000
Instructional Personnel:															
Core Content Teacher(s)	13	\$42,000	\$546,000	16	\$44,000	\$704,000	19	\$46,000	\$874,000	23	\$48,000	\$1,104,000	26	\$50,000	\$1,300,000
Exceptional Children Teacher(s)	1.5	\$42,000	\$63,000	2	\$44,000	\$88,000	2.5	\$45,500	\$113,750	3	\$47,000	\$141,000	3.5	\$48,600	\$170,100
Part Time Specialty Teachers	5	\$20,000	\$100,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	2	\$28,000	\$56,000
Full Time Specialty Teachers	0	\$0	\$0	5	\$40,000	\$200,000	5	\$42,000	\$210,000	6	\$43,500	\$261,000	6	\$45,000	\$270,000
Teacher Assistants	5	\$30,000	\$150,000	5	\$31,000	\$155,000	5	\$32,500	\$162,500	5	\$33,800	\$169,000	5	\$35,000	\$175,000
B - Total Instructional Personnel:	24.5		\$859,000	28		\$1,147,000	31.5		\$1,360,250	37		\$1,675,000	42.5		\$1,971,100

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A+B = C - Total Admin, Support and Instructional Personnel:	28.5		\$1,021,000	33		\$1,388,000	37.5		\$1,642,250	45		\$2,018,700	50.5		\$2,328,100
Administrative & Support Benefits															
Health Insurance	4	\$4,200	\$16,800	5	\$4,350	\$21,750	6	\$4,500	\$27,000	8	\$4,650	\$37,200	8	\$4,800	\$38,400
Retirement Plan-401 K	4	\$2,500	\$10,000	5	\$2,600	\$13,000	6	\$2,700	\$16,200	8	\$2,800	\$22,400	8	\$2,900	\$23,200
Life & Disability Insurance	4	\$900	\$3,600	5	\$950	\$4,750	6	\$1,000	\$6,000	8	\$1,050	\$8,400	8	\$1,100	\$8,800
Medicare, Social Security, And Unemployment	4	\$3,550	\$14,200	5	\$3,650	\$18,250	6	\$3,750	\$22,500	8	\$3,900	\$31,200	8	\$4,050	\$32,400
D - Total Admin and Support Benefits:	16		\$44,600	20		\$57,750	24		\$71,700	32		\$99,200	32		\$102,800
Instructional Personnel Benefits:															
Health Insurance	24.5	\$4,200	\$102,900	28	\$4,350	\$121,800	31.5	\$4,500	\$141,750	37	\$4,650	\$172,050	42.5	\$4,800	\$204,000
Retirement Plan-401 K	24.5	\$2,500	\$61,250	28	\$2,600	\$72,800	31.5	\$2,700	\$85,050	37	\$2,800	\$103,600	42.5	\$2,900	\$123,250
Life & Disability Insurance	24.5	\$900	\$22,050	28	\$950	\$26,600	31.5	\$1,000	\$31,500	37	\$1,050	\$38,850	42.5	\$1,100	\$46,750
Medicare, Social Security, And Unemployment	24.5	\$3,050	\$74,725	28	\$3,150	\$88,200	31.5	\$3,250	\$102,375	37	\$3,350	\$123,950	42.5	\$4,050	\$172,125
E - Total Instructional Personnel Benefits:	98		\$260,925	112		\$309,400	126		\$360,675	148		\$438,450	170		\$546,125
D+E = F - Total Personnel Benefits	114		\$305,525	132		\$367,150	150		\$432,375	180		\$537,650	202		\$648,925
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	20		\$206,600	25		\$298,750	30		\$353,700	40		\$442,900	40		\$459,800
B+E = H - Total Instructional Personnel (Salary & Benefits)	122.5		\$1,119,925	140		\$1,456,400	157.5		\$1,720,925	185		\$2,113,450	212.5		\$2,517,225
G+H = J - TOTAL PERSONNEL	142.5		\$1,326,525	165		\$1,755,150	187.5		\$2,074,625	225		\$2,556,350	252.5		\$2,977,025

Operations Budget: Expenditure Projections
2016-17 through 2020-2021

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
	Administrative & Support:					
Other	Legal Fees	\$5,000	\$6,000	\$7,000	\$8,000	\$5,849
	Audit	\$7,500	\$8,000	\$8,500	\$9,000	\$8,774
	Advertising Marketing	\$4,000	\$4,500	\$5,000	\$5,500	\$5,800
	Insurance	\$13,076	\$16,168	\$17,988	\$19,687	\$21,182
	Communications, Website, Admin, Software	\$30,000	\$20,000	\$24,000	\$28,000	\$32,000
	Facility Rent	\$350,000	\$406,000	\$454,720	\$500,192	\$540,207
	Facility Repairs & Maintenance	\$35,000	\$46,400	\$51,968	\$57,165	\$61,738
	Facility Utilities	\$48,000	\$55,680	\$62,362	\$68,598	\$74,086
	Office Expense, Supplies, Postage	\$24,000	\$29,840	\$33,181	\$36,299	\$39,043
	Isis, Powerschool, And Admin, Support Fees	\$58,000	\$36,000	\$44,640	\$53,122	\$61,621
	Student Transportation	\$36,000	\$45,000	\$53,000	\$60,000	\$73,000
	Student Meals Assistance	\$24,000	\$38,440	\$45,986	\$50,393	\$62,816
	Technology, Equipment, F & F	\$30,000	\$30,000	\$35,000	\$45,000	\$55,000
	Travel	\$4,000	\$5,000	\$6,000	\$7,500	\$8,500
	Miscellaneous	\$10,000	\$15,000	\$20,000	\$25,000	\$30,000
	K - TOTAL Administrative & Support Operations	\$678,576	\$762,028	\$869,345	\$973,456	\$1,079,616
	Instructional:					
Other	Curriculum	\$40,000	\$40,000	\$55,000	\$65,000	\$75,000
	Classroom Technology & Software	\$40,000	\$30,000	\$40,000	\$50,000	\$60,000
	Instruction - Contracted Services	\$24,000	\$32,000	\$42,000	\$50,000	\$62,000
	Staff Development	\$18,000	\$26,200	\$28,984	\$31,582	\$34,869
	Testing And Fees	\$15,000	\$19,400	\$21,488	\$24,437	\$27,152
	Miscellaneous	\$15,000	\$30,000	\$35,000	\$40,000	\$45,000
	Books And Materials	\$28,000	\$44,760	\$49,771	\$54,448	\$59,564
	E C Contracted Services	\$15,000	\$21,000	\$28,000	\$36,000	\$45,000
	I B Program Costs	\$0	\$0	\$0	\$50,000	\$50,000
	L - TOTAL Instructional Operations	\$195,000	\$243,360	\$300,243	\$401,467	\$458,585
	K+L = M - TOTAL	\$873,576	\$1,005,388	\$1,169,588	\$1,374,923	\$1,538,201

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	OPERATIONS					
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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$1,326,525	\$1,755,150	\$2,074,625	\$2,556,350	\$2,977,025
M - TOTAL OPERATIONS	\$873,576	\$1,005,388	\$1,169,588	\$1,374,923	\$1,538,201
J+ M =N TOTAL EXPENDITURES	\$2,200,101	\$2,760,538	\$3,244,213	\$3,931,273	\$4,515,226
Z - TOTAL REVENUE	\$2,264,638	\$2,966,674	\$3,678,675	\$4,377,623	\$5,078,043
Z - N = SURPLUS / (DEFICIT)	\$64,537	\$206,136	\$434,462	\$446,350	\$562,817

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.

Student Enrollment: Union Day School will open with 325 students with grades K through 3 and add 100 students a year until the enrollment maximum of 825 (year 6) is reached in grades K-8. While the long range goal of the directors is to have a K-12 charter, it believes the best way to grow a high quality school is to start smaller and add size and grades purposefully. The 325 students in year one will afford the staff, parents, and students to assimilate and start the culture of a school that will grow from that nucleus.

Why Demand: Union County continues to be one of the fastest growing counties in NC and was the seventh fastest in the U.S. just recently. It has only one charter, Union Academy, started in 2000 and currently with an estimated 1,500 wait list. The district is in the top 10 in size in NC. It has incurred a massive reassignment of students from the west to the mid-county area schools this year. On January 23, 2014, Dr. Mary Ellis, Superintendent of Union County Public Schools provided a report, "2014 Options to Relieve Overcrowding" to the Union County Board of Education. It may be found on the UCPS website and details the massive overcrowding in the western part of Union County. Below is a preamble to a resolution by the Union County Board of Education, July 8, 2014 for redistricting that took place this school year:

"WHEREAS, the Union County Public School System has been one of the fastest growing school systems in the country over the past 15 years, with enrollment increasing from approximately 22,000 in 1999-2000 to an anticipated student enrollment in excess of 42,000 for the 2014-15 school year; and

WHEREAS, substantial school construction has not kept pace with the student growth and location of that growth, resulting in severe overcapacity issues in a number of schools; and...

Union County's redistricting plan will displace up to 5,500 students this current year. Union County is a diverse county with 67% white, 13% black, 13% Hispanic, and 5% other. Growth is fastest in the west but UDS is reflecting

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on locations within any section of the county and regardless where located will attract a diverse population eager for a second charter in the large county, one of the fastest growing areas of the state with no charter added in a decade and a half. See McKibben report in appendices for full growth projection.

Break-even point: The break even point in number of students was calculated by dividing non- variable costs (fixed costs) by margin, or revenue less variable costs per student. That number was 298 students to break even. A calculation of this called "Breakeven Analysis" may be found in Appendix U ("Addendum to Budget and Financial Plan).

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

More drastic measures beyond reducing staffing levels, etc. would include:

1. Facilities cost are 20% of total first year expenditures and would be addressed first. A renegotiation of any facilities commitment to defer two months rent, \$58,000.
2. Elimination of the Finance Officer, savings \$39,000.
4. \$100,000 has been estimated for infrastructure, IT, capital assets, telephones, laptops, desks, etc. Leases would defer 75% of that or \$75,000.
5. The audit fee is actually not be payable in the initial 12 months, deferral \$7,500.
6. The NCPCSA development fee will be deferred to 2017 if the ADM enrollment is less than 75% of the ADM projected, deferral \$24,000.

Some keys to avoiding cash crises are:

1. Vigorous marketing generating application interest early.
2. Dealing with charter friendly vendors extending fair terms.
3. Retaining flexibility with our facilities commitment until a balanced budget is assured.
4. Close and consistent communication with ISIS provider, CPA & OCS consultants

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

No, there are no revenues in our budget other than state and local ADM funds including a conservative estimate of EC funding.

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

20 to 1 in K (10:1 w/ FT TA's) and grades 1-8 25:1

2. *Does the school intend to contract for services such as student accounting and financial*

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services, exceptional children instructional support, custodial etc. Describe the criteria and procedures for the selection of contractors and large purchases.

The Board contracted with the NC Public Charter Schools Association to help develop our planned school and application. The agreement calls for a \$24,000 fee payable in year one only if a charter is awarded and the school receives 75% of its projected ADM enrollment. More details of the contract and services are in the application section, "Application Contact Information."

The Board will outsource its Integrated Solutions Information Systems (ISIS) services but has not selected a provider. However, in the budget there is estimated for ISIS, \$22,000, the development contract mentioned above, \$24,000, and \$12,000 for PowerSchool and possible other administrative services, totaling \$58,000.

We will likely contract for EC services to complement our two full time EC staff.

Our board will set contract authorization levels, and recognize the need for conflict of interest avoidance, for itself and for the Principal. So all commitments exceeding predetermined amounts will require approval at different levels with the appropriate assignment of contract accountability placed also, to ensure the school receives the services and products contracted for and at the correct price.

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

The budget not only aligns with the school's mission, but with curricular offerings, the transportation plan, meals plan, and before and after school needs.

The school's mission is to provide a rigorous and content-rich education for the students of UDS. This is reflected in the budget under Operations-Instructional where the school has budgeted \$138,000 in the first year for educational costs beyond services, books, technology, testing, etc., or close to \$500 a child. UDS will institute an I B Program in year 4 and estimates that cost at \$50,000 a year.

The UDS mission calls for services to a diverse "community" of students and thus expects to attract students of all socio-economic backgrounds. The school has set aside \$36,000 in transportation costs in year one and \$45,000 in year two to ensure that transportation does not become a barrier for students and parents. This cost is also reflected in the Transportation section of the application. The school plans to set aside \$25,000 in year one and \$38,440 in the second year, to provide assistance for students needing help with cost of meals to further make the school attractive to families of less financial means.

The expanded school day of UDS, partly funded with salaries for teachers asked to devote a longer day to the school, will be available to parents and has been described elsewhere in the application. While there is no provision for assistance to families in need of this expanded care, there are fundraising efforts planned to raise money for the enrichment programs.

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

Describe how the school will develop the fund balance.

The general fund balance should equal a month's operating expenses by the fifth year. That monthly total will be \$376,000. The budgeted accumulated surplus or general fund balance, after five years is \$1,714,302, well over that amount. This represents saving 9 cents for every dollar in revenue received. It also represents, then 10 cents for every dollar of expenditures over the five-year budget period.

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

UDS will always make lease versus purchase decisions based upon sound economics and professional financial analysis. In the critical initial year of our school leases may be required, whereas in subsequent years we will be able to avoid the financing costs.

The initial facilities will be leased with consideration of purchasing between years 5 and 10 as it builds surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and UDS. Another, and more recent recent form of transaction in North Carolina, among new charters, is a transaction including a developer such as Funding the Gap, American Charter Development, HighMark, or other partner. These companies assist charters in locating facilities and then purchasing them and with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new facility after the term lease of the initial facility.

Some items such as office printers/copiers, etc. may be leased. We do, however, have the option of deferred payments or leases of various other items in the budget if our enrollment targets are not met or if the financing terms are beneficial to purchasing.

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*

There is no tangible resources at this time. We will solicit donations of goods and services upon receipt of acceptance of our application in addition to an aggressive Union County and Charlotte Area business fundraising campaign and grant request project.

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

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

Basics of good internal control are the foundation for the reliability of the financial statements and are needed to safeguard the resources of the school. Not only is UDS at risk of losing valuable resources with poor controls but there is more at risk. That is the potential for negative publicity associated with any event that might attract notoriety including financial theft or even financial mismanagement. This also often brings a stigma to other charter schools, or indeed to the whole North Carolina charter program and its attendant regulation.

We will contract with a CPA firm (see below) to provide the annual audit but in addition we will request from them an initial report on our internal controls. This will include an evaluation of our controls before we open our school so that any weaknesses are discovered and corrected before the school year begins.

We will contract for the DPI required services of the Integrated Solutions Information System with a provider after receiving more quotes. Outsourcing ISIS creates another level of cash segregation by its external accounting for our pupil funds, accounts payable, and payroll.

Internally, we will keep a petty cash fund for emergencies and use a system requiring a paid receipt and/or authorization for expenditures. Approval of expenditures over a recommended amount will require the signature of the Principal.

Accounting records will be safeguarded by use of daily locked files and to the extent practical secure online records with appropriate password protections. Sensitive records will be systematically shredded as necessary. The board treasurer will provide a financial statement to include a statement of fund balances (balance sheet) and a statement of receipts and expenditures (a P&L) at each regularly held board meeting and an explanation to board members for questions. Additionally, at least quarterly the ISIS provider and or the auditors will be asked to attend board meetings.

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

UDS has a contract with the NCPCSA, mentioned earlier in the "Application Contact Information" section, for assistance with the development of our school plans, our application, and subsequent support. The NCPCSA also provides the state required ISIS accounting services. The NCPCSA has related to UDS that there is no obligation for our board to contract with them for ISIS or any other services and the NCPCSA has advised us to solicit bids and interview other providers for this important decision.

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

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investigated.

UDS has solicited audit bids from firms qualified by the Local Government Commission. It has discussed the audit and fees with two firms who agreed that it would be in our interest to negotiate fees closer to the school opening. Those firms giving tentative estimates of \$8,500 and \$10,500 are:

Rives & Associates, LLP, 212 West Center St., Lexington, NC , 336-248-8281
336-248-2335

Potter & Company, CPAs, 434 Copperfield Blvd. NE, Concord, NC 28025, 704-786-8189 704-786-4447

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
\$48K for teachers in year five seems low.	Kathryn Mullen Upton	Personnel Bu
NOTE: the salary ranges given earlier are apparently inclusive of growth over five years, so there may not be any ability to differentiate pay for individual teachers, especially in early years. Are these competitive rates?	Kristen Vandawalker	Personnel Bu
why are the year five numbers oddly specific in some cases? the rise and fall in line items makes little sense. there doesn't even seem to be anything that increases on pace with added growth of staff and student numbers. why does legal increase steadily and then drop off in year 5. the "advertising/marketing" line is very very low. i have no idea what is included in the office expense line, but it seems very high. transportation was supposed to be \$20k? Why is instructional spending so low? why does classroom spending drop in year two, then go back to the same level as year one, and then finally increase in year four? what is in "miscellaneous" in both sections of the budget, and why is this amount so high in instructional? the contracted sped services number seems very low. why do the costs for books and materials double in year two? how is this different from "curriculum."	Kristen Vandawalker	Operations B
Food service does not appear to be included.	Kathryn Mullen Upton	Operations B
It is unclear if contracted services for EC include related service providers (occupational therapy, speech therapy, physical therapy, school psychologist, etc.) or evaluations for special education.	Carol Ann Hudgens	Operations B
There is no evidence presented supporting the need for a charter school (overcrowding and redistricting arguments don't hold water in the absence of a specific location). There is no evidence presented supporting "demand" for any charter school. "reducing staffing levels" is generally regarded as a "drastic" cost cutting measure. There is no reason to believe that the school would be able to renegotiate a lease after school opens. Eliminating a staff member does not eliminate the work they are meant to do, who will handle all of the school's business and operations functions? what is the basis for assuming that you can transition to leases after school has started on FFE? What \$138K (\$500/student) are they talking about? and what is included in this? What is the expanded school day? Thirty days cash on hand should be a minimum, not an aspirational goal. This section evidences serious lack of preparation to manage public funds responsibly.	Kristen Vandawalker	Budget Narra
Eliminating the finance officer raises concerns regarding the ability to manage/oversee funds.	Kathryn Mullen Upton	Budget Narra
The statements regarding the contracting of services to complement EC staff does not consider the potential service delivery requirements of incoming IEPs (related services, assistive technology, behavior support, etc.).	Carol Ann Hudgens	Budget Narra

Reviewer	Score
Cheryl Turner	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Helen Nance	
Alex Quigley	
Kristen Vandawalker	Fail
Darrell Johnson	Pass

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Alan Hawkes	
Steven Walker	

VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 26, 2014 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.

**Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 26, 2014 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).

udscharter

Date: 09/26/2014

Applicant Signature:

The foregoing application is submitted on behalf of Union Day School (*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: udscharter

Board Position: Board Chair

Signature: _____

Date: 09/26/2014

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public Official Seal

My commission expires: _____, 20____.

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OVERALL ASSESSMENT

Would you as the Advisory Board deem this application complete? The decision of the Advisory Board regarding completeness is final. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Initial Screening Votes</u>	
No	Yes
0	11 AH, JM, PG, HN, SR, AQ, ES, TS, BT, CT, SW

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

<u>Total External Evaluator Votes</u>	
No	Yes
3	0

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

<u>CSAB Votes</u>	
No	Yes
0	11 HN,AQ,ES, AH, SW, SR, TS, CT, JM, PG,BT

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

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Initial Screening	
Mission, Purposes, and Goals	- djuan70
Education Plan	- djuan70
Governance and Capacity	- djuan70
Operations	- djuan70
Financial Plan	- djuan70
OVERALL	- dtsmith840 - djuan70 - djuan70

External Evaluator	
Mission, Purposes, and Goals	<p><u>Mission Statement</u> Three different mission statements? - kvandawalker</p> <p><u>Mission Statement</u> The mission isn't quite clear as to what constitutes high quality academic success (e.g., college/career ready?) and enriched personal growth. Question for interview: please describe. - kmullenupton</p> <p><u>Educational Need and Targeted Student Population</u> why does grade level size drop 25 students in middle grades? where do you expect to lose the 25 students between grades 5 and 6? what happens if more students desire to matriculate? Do you anticipate zero attrition? given this description, shouldn't enrollment be 400, 400, 575, 650, 725, 800? Is this meant to be a k-8 school or a k-12 school? it is unclear how this proposed curricula differ from the LEA? does the LEA simply not offer IB and not use the names programs? Why not uses early years IB? how will students transition from the named products to IB? What work has been done to prepare from IB candidacy? No information about the size, scope or methodology of the survey, or the "resolutions in support of" the school. - kvandawalker</p> <p><u>Purposes of Proposed Charter School</u> what is the typical grade configuration for this area? are students typically in 3 different schools for ES/MS/HS? are the particular extracurriculars in such high demand that students will choose a charter because of them? It is unclear what is special or unique about this program that will attract parents/students. - kvandawalker</p>

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	<p><u>Goals for the Proposed Charter School</u> The community service goals are vague. Are the hours mentioned an annual goal? - djuan70</p> <p><u>Goals for the Proposed Charter School</u> Goals are not addressed in SMART terms and lack rigor. Given that students will be in primary grades, these goals seems abysmally low. Why would you now expect 100% of students to make a full year of academic growth? Why are there no BOY to EOY measures? What is the basis for community service goals? Where did the number of hours come from? These seem too low to have meaningful impact on the students. Why does cursive penmanship rise to the level of an academic goal? The answer regarding board awareness is wholly inadequate. - kvandawalker</p> <p><u>Goals for the Proposed Charter School</u> There are no finance or governance goals included. Those would strengthen the board's ability to assess the effectiveness of the school. - kmullenupton</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> It is unclear why the names programs were selected. No information about the quality or success of any of the programs is presented, nor is information about the use of these programs with similar populations provided. It appears that the applicant may not understand the distinction between curriculum and standards. For example, in Social Studies, that applicant notes that a curriculum will supplement the standards, when one assumes, based on the brief description provided, it is actually meant to supplement a more comprehensive curricular program. - kvandawalker</p> <p><u>Curriculum and Instructional Design</u> The learning environment section is quite poorly written and difficult to understand. The rationale for having a 10:1 ratio for kindergarten and then moving immediately to 25:1 in kindergarten is unclear. What is the difference between teacher work days and PD days? the placement of these days makes little sense, and there are only four PD days for the whole year, which seems wholly inadequate. Appendix B appears to be little more than a copy of the table of contents for the various math textbooks. No actual instructional methodologies are named. NOTE: verify whether teacher compensation reflects required tutoring sessions and expectation that teachers will already be proficient in collecting and analyzing student data, and then using their findings to drive instruction. The school calendar section makes little sense. What time does the school day start? End? What makes up the nearly 8 hours of instruction? How does the school day structure differ for various grade levels? How are primary grade students supported in meeting the mental and physical demands of a long school day? How does the school day align with other schools' start and end time? why would families not put all of their kids in the same school? What is an "out commute" and what is the significance of an 80% rate? - kvandawalker</p> <p><u>Special Programs and "At-Risk" Students</u> This section is wholly inadequate, and I'm not certain it rises to the level required to meet the law. There is no indication that the applicant understands the identification and monitoring processes, nor the scope of work involved in service students with exceptionalities. - kvandawalker</p>

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Exceptional Children – Identification and Records

How will written requests for evaluation from parents be addressed? Why must a personal education plan be in place before a student is referred to special education? - carolann_hudgens

Exceptional Children – Identification and Records

1. Will the questions concerning if a student has a 504 or an IEP before they are accepted or after?

2. Is the "Student Information Packet" or "Supplemental Registration Form" after acceptance?

*** Those questions can not be on "an initial" application. - djuan70

Exceptional Children – Identification and Records

As with the previous section, this section is egregiously underdeveloped and in some places the language makes no sense. - kvandawalker

Exceptional Children – Education Programming

Please provide more details regarding the continuum of special education services to include separate settings, resource, and split schedule. Please describe the process for the development, the review and revision of IEPs. - carolann_hudgens

Exceptional Children – Education Programming

This section is woefully underdeveloped. It is unclear whether the applicant understands how to ensure access to the general curriculum for students with special needs.

Verify/; is the "EC teacher" actually a director-level role? does this teacher also carry a full classload? - kvandawalker

Student Performance Standards

this section is wholly inadequate and in some places the writing does not make sense.

Will teachers, especially for primary grades, have time to prepare weekly progress reports for every student? this seems like a heavy lift. It is unclear what mentoring will add to the education of students with IEPs, and when it is implemented. How is it possible to map backwards from exiting as student? Does this just mean seventh grade, or does it mean exiting a student from sped services? Why do all students not get a mentor? - kvandawalker

Student Performance Standards

The data feedback cycle for teachers is not detailed. Question for interview: please describe the feedback cycle. - kmullenupton

Student Conduct and Discipline

Response #3 does not reference the NC Policies Governing Students with Disabilities. For example, there are no references to manifestation determinations or the requirements regarding the provision of services. - carolann_hudgens

Student Conduct and Discipline

Concerning the term "expelled", please note: 115C-390.11. Expulsion. (a) Upon recommendation of the superintendent, a local board of education may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff. - djuan70

Student Conduct and Discipline

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	<p>This section is egregiously underdeveloped and does not demonstrate capacity to develop effective school culture. Is 10 absences really enough to retain a student? It's not super clear to me what the connections between offenses and consequences are. The length of the school day does not equal the length of the instructional day. Note that the previous "instructional" day is actually the school day. - kvandawalker</p> <p><u>Student Conduct and Discipline</u> There is a brief reference to the IDEA, regarding discipline and students with disabilities. Question for interview: please describe how the school will handle suspension and expulsion of students with disabilities. - kmullenupton</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Appendix E was not included, but status could be pending. Question for interview: what is the status of the 501 application? - kmullenupton</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The range of board size (7-9) members seems odd? The org chart appears to indicate that the board has some type of power over the teacher advisor and the parent advisory council, which seems conterintutive. Does the principal directly supervise every school employee? Is electronic participation legal under NC OMA? Neither the narrative nor the board member questionnaires indicate a clear understanding of the actual role of the board for charter school. Taken together, the questionnaires do not evidence a board composed of members intimately familiar with the application. For example, IB was not mentioned by any of the board members and most of them did not reference the education plan at all. The responses to this section are seriously underdeveloped, and most questions are completely unanswered. The criteria are not addressed. No evidence of a thoughtful, formal process for recruiting and selecting qualified, committed board members is presented. There is no evidence that any of the board members have had or will receive the training needed to oversee an educational program. The onboarding proposed is oddly put together and does little to prepare the prospective board member for the decisions they will need to make. Pasting in sections of the bylaws or student handbook does not constitute a response to a question. No committee structure is evident. No plan for policy development is presented. Priorities for new board member recruitment are not presented. - kvandawalker</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The organization chart does not detail what comprises the support staff. Additionally, the personnel budget does not include the teacher-advisor position. Question for interview: why is the teacher-advisor position on the same level as the principal?</p> <p>The grievance procedure was not included in the narrative, although a grievance procedure was in the staff manual. Question for interview: what is the grievance procedure for parents/families? - kmullenupton</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - kmullenupton</p> <p><u>Projected Staff</u></p>

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	<p>How is a part time custodian sufficient or practical for a school serving primary grades? why does custodial support not increase? Will a nurse, social worker, and lunch staff not be present? How will the proposed staffing structure support the educational model proposed? How will 13 teachers support 400 students? or 325? No foreign language teachers in any year? None of the additional administration/leadership roles mentioned in other sections are listed here. - kvandawalker</p> <p><u>Staffing Plans, Hiring, and Management</u> this section is incredibly weak. no recruitment or retention plan is presented. There is no explanation of the plan or timeline for hiring any staff, nor an explanation of how the proposed compensation is "competitive" with other schools or the state scale. It is unclear whether these ranges are inclusive of all experience levels. Do the salary ranges include compensation for the extra work teachers are expected to do? None of the additional administration/leadership roles mentioned in other sections are listed here. Are the part time positions budgeted for half of the hours of a full time position? Why are they not able to make assumptions regarding ELL students the same way that they have for EC students? How will they hired based on student population when their enrollment will not be final until after the school year starts? As written, the application implies that they will start school unprepared to serve all students. There is no evidence that the applicants understand the magnitude of a hiring process, nor that they possess the qualifications to develop teacher job descriptions and execute a rigorous search. Appendix O is plagiarized from the Roger Bacon Academy. It references "corporate office" and uses statements like "regardless of the LEA where the school is located." It uses job titles not used by the applicant. The IB programme and K-2 grading system are not mentioned. - kvandawalker</p> <p><u>Staff Evaluation and Professional Development</u> This section is severely underdeveloped. Is it realistic that the principal, as the sole supervisor of all employees, as well as head of school, will have time to plan and implement a thoughtful and thorough PD plan? There is no evidence that the applicant has or can develop an actual PD plan, or that they understand the level of rigor required to provide a growth environment for teachers at a variety of levels of experience. No schedule for PD is provided. Only ONE extra day of orientation for new teachers? Why are they sure that all teachers will need to be trained in Singapore and HWT? - kvandawalker</p> <p><u>Marketing Plan</u> No concrete marketing plan is in place. Where do they plan to hold the "open Houses"? There is no evidence that the applicants have any experience in, let alone success with marketing and media, nor that they understand the gravity of this work. - kvandawalker</p> <p><u>Marketing Plan</u> Question for interview: please provide additional detail on the strategy to hone in on areas with fewer student applications. \$4,000 may be low for marketing. - kmullenupton</p> <p><u>Parent and Community Involvement</u></p>
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	<p>There is no plan present, nor is there evidence that te applicants understand what they are being asked to explain. - kvandawalker</p> <p><u>Parent and Community Involvement</u> Question for interview: please describe in greater detail the plans for ongoing teacher-parent communication. - kmullenupton</p> <p><u>Admissions Policy</u> I presume that this is the same as what appears in the handbook. It is vague and confusing and poorly written. I'm unclear on whether it s legal for the founders to reserve seats for their own children. - kvandawalker</p> <p><u>Projected Student Enrollment (Table)</u> Note the previous question regarding evidence of parent demand in the Proposed Grades and Total Enrollment Table. Without survey data indicating families are likely to enroll, it is difficult to discern whether projected growth is realistic. - kmullenupton</p>
Operations	<p><u>Transportation Plan</u> Transportation plans do not include "special transportation" that may be required as a related service in the individual education program of students with disabilities. - carolann_hudgens</p> <p><u>Transportation Plan</u> There is no evidence that \$20k is reasonable or adequate to cover any kind of meaningful transportation plan, especially without a location for the school. Additionally, it is important to note that the student handbook discusses a busing plan, which the applicants probably should have addressed here. There is no evidence that the applicant has given more than passing attention to transportation. - kvandawalker</p> <p><u>Transportation Plan</u> The \$20,000 noted in the narrative seems low for transportation. Additionally, the operations budget shows transportation projections of \$36,000. Question for interview: which figure is correct?</p> <p>If the school will rely in part on car-pooling, delegating this critical service to a volunteer organization for a 700+ student school may not be the most effective way to to ensure that all students have access to transportation. Question for interview: why the decision to delegate? - kmullenupton</p> <p><u>School Lunch Plan</u> there is no actual plan present. - kvandawalker</p> <p><u>School Lunch Plan</u> Food costs were not included in the operations budget. - kmullenupton</p> <p><u>Facility and Facility Contingency Plan</u> There is no evidence of any actual plan to acquire a facility, nor evidence that they applicant has done any legwork on this front. - kvandawalker</p> <p><u>Facility and Facility Contingency Plan</u> The facilities plan is not well developed; there is not a contingency plan. - kmullenupton</p>
Financial Plan	<p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> NOTE: the salary ranges given earlier are apparently inclusive of growth over five years,</p>

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	<p>so there may not be any ability to differentiate pay for individual teachers, especially in early years. Are these competitive rates? - kvandawalker</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> \$48K for teachers in year five seems low. - kmullenupton</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> It is unclear if contracted services for EC include related service providers (occupational therapy, speech therapy, physical therapy, school psychologist, etc.) or evaluations for special education. - carolann_hudgens</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> why are the year five numbers oddly specific in some cases? the rise and fall in line items makes little sense. there doesn't even seem to be anything that increases on pace with added growth of staff and student numbers. why does legal increase steadily and then drop off in year 5. the "advertising/marketing" line is very very low. i have no idea what is included in the office expense line, but it seems very high. transportation was supposed to be \$20k? Why is instructional spending so low? why does classroom spending drop in year two, then go back to the same level as year one, and then finally increase in year four? what is in "miscellaneous" in both sections of the budget, and why is this amount so high in instructional? the contracted sped services number seems very low. why do the costs for books and materials double in year two? how is this different from "curriculum." - kvandawalker</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Food service does not appear to be included. - kmullenupton</p> <p><u>Budget Narrative</u> The statements regarding the contracting of services to complement EC staff does not consider the potential service delivery requirements of incoming IEPs (related services, assistive technology, behavior support, etc.). - carolann_hudgens</p> <p><u>Budget Narrative</u> There is no evidence presented supporting the need for a charter school (overcrowding and redistricting arguments don't hold water in the absence of a specific location). There is no evidence presented supporting "demand" for any charter school. "reducing staffing levels" is generally regarded as a "drastic" cost cutting measure. There is no reason to believe that the school would be able to renegotiate a lease after school opens. Eliminating a staff member does not eliminate the work they are meant to do, who will handle all of the school's business and operations functions? what is the basis for assuming that you can transition to leases after school has started on FFE? What \$138K (\$500/student) are they talking about? and what is included in this? What is the expanded school day? Thirty days cash on hand should be a minimum, not an aspirational goal. This section evidences serious lack of preparation to manage public funds responsibly. - kvandawalker</p> <p><u>Budget Narrative</u></p>
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	Eliminating the finance officer raises concerns regarding the ability to manage/oversee funds. - kmullenupton
OVERALL	<p><u>Cover Page</u> This makes it sound as if the applicant is admitting plagiarism. - kvandawalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Proposed school will be located in a county with another K-12 charter school. In recent years, schools that projected enrollment numbers similar to these fell short of their goals. How would this school market to ensure the proposed 325 is met the first year? - djuan70</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> these projections don't make sense given the explanation in the narrative. - kvandawalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Appendix A indicates that there is need, although the survey information didn't include data on whether prospective parents/guardians might send their child to the proposed school. As such it's difficult to determine whether the enrollment figures are realistic. - kmullenupton</p>

Charter School Advisory Board Subcommittee

Mission, Purposes, and Goals	<p>The interview began with a basic overview of the school detailing the mission and enrollment of the school. In addition, each section pass/fail ratings by the external evaluators was provided. The BOD gave an overview of their occupation and the role on the board. 1 board member was introduced but not present during the interview. The board stated the mission is to provide an education for all students no matter their background as it begins with a firm foundation. Mr. Sanchez had questions on how the goals were created and why they were chosen. The BOD responded that the goals established are the base and they hope to exceed the goals that are outlined in the application. The BOD proposes to go back to the basics of education as the goals outline what the parents want from them.</p> <p>Mr. McLaughlin asked for clarification on the location of the school and would it be convenient for the targeted population. The board chair explained that someone donated land and it would have easy access to six towns. Ms. Nance asked about the facility. A local church, which is relocating, would allow the school to lease it for a year. The plan is to build modulars.</p>
Education Plan	<p>CSAB questioned the applicant group on the day of a life at the school. One board member gave an overview for elementary and what the typical schedule would look like in elementary. Ms. Sutton had questions about the EC concerns outlined by the external evaluators. The BOD reports they will have a full time and part time EC staff.</p>
Governance and Capacity	<p>Mr. Walker questioned the Roger Bacon policies as the policies still state Roger Bacon within the application. The applicant group stated it was uploaded by mistake and at the last minute. A member of the board says the mistake was because the information was from a volunteer. The applicant group stated they did not know they knew the appendices had to be in PDF and they were working from Google docs until 2 hours before the application was due.</p>

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	Ms. Nance noted that the board is diverse.
Operations	The school plans to contract with an outside bus service and have budgeted for 1 bus accommodating 50 - 60 students according to one board member. The school is proposing a 10:1 ration according to the board chair in elementary. IB will be implemented at the later years. BOD reported the proposed location will draw from 6 different locations. Ms. Nance had questions about the facility and the contingency plan. The BDO reports they are in negotiations with one of the members church or pre fab modular options. Mr. Maimone questioned the student teacher ratio as there were differences in the application. The BOD responded there is an assistant in every classroom which decreases the student teacher ratio.
Financial Plan	Mr. Quigley questioned the group on the contingency plan regarding the break even number. A member from the BOD discussed the break even and thinks if meets the 298 they will be okay.
OVERALL	Mr. Maimone feels satisfied that the group has provided enough information. Mr. Walker thinks there is a need and that there are interesting ideas presented with a need in Union county. Mr. Walker made a motion to move to ready to open. Ms. Taylor second. The motion passed unanimously.

Overall Summary

Initial Screening	The Office of Charter Schools deems this application complete.
10/22/2014	The CSAB voted unanimously to deem this application complete on November 14, 2014.
Application Review	<p>On January 12, 2015 the CSAB subcommittee voted to move this application to interview. The subcommittee vote was 6 yes to 0 no. The full CSAB vote was 10 yes to 0 no for interview.</p> <p>Concerns outlined consisted of the following:</p> <p>Steven: Concerned about appendix O. Many references about Roger Bacon and a lot of concern about the Board's thinking. Outside that drafted that? Concerned about the plagiarizing the application. Did the board vote on appendix O?</p> <p>Alex: Clarity of the IB program. You will become an IB in middle school only? Did you all plagiarize the Roger Bacon Handbook? Why didn't you cite that? Concern saying we cite things and then don't follow the process outlined. Some sections they were a pass on. Seems they failed on finance and operations. Do we feel this is a lack of understanding or competency.</p> <p>Becky: Concerned about the citing of the usage of a template.</p> <p>Alan: Concern that we are being punitive.</p> <p>Steven moves to move application forward. Gibbs seconded.</p> <p>Cheryl and Becky: Concerned about plagiarism but there are some good things in the application.</p> <p>Motion to move application to interview unanimously carries.</p>
Application	On February 10, 2015 the CSAB subcommittee voted to recommend this application to

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Interview	the SBE to start the planning year. The full CSAB vote was 11 to 0.
OVERALL	This application will move forward to the Preliminary Planning year. The vote was unanimous.