



The Exploris School

Board Meeting

Date and Time

Tuesday April 30, 2019 at 4:30 PM EDT

Location

The Exploris School - Middle Campus

Agenda

	Purpose	Presenter	Time
I. Opening Items			4:30 PM
A. Record Attendance and Guests		Tom Miller	1 m
B. Call the Meeting to Order		Tom Miller	1 m
C. Approve Minutes	Approve Minutes	Keely Byars-Nichols	3 m
Approve minutes for Board Meeting on March 26, 2019			
D. Public Comment Opportunity		Tom Miller	15 m
The Exploris Board desires to hear from their stakeholders. Members of the general public are provided three (3) minutes of time to state a concern or bring ...			
II. CLOSED SESSION - Legal Update			4:50 PM
A. Legal Update	FYI		10 m
III. Strategic Plan			5:00 PM
A. Strategic Plan	Vote	Ellie Schollmeyer	10 m
Strategic Plan:			
Board approval is requested for the 2019 - 2024 Strategic Plan			
Final Draft of the Strategic Plan is attached for your review			
IV. ED Report			5:10 PM
A. Academic/ Personnel / Operations	Vote	Ellie Schollmeyer	10 m
Academic Update:			

MAP Testing – April / May
 mClass Testing – May 6 - 28
 EOG Testing Window – May 6 – June 7th

Personnel and Staffing Update:

Positions to be filled:

6th grade Teacher – Final 2 candidates - on site visits in progress
 K Teacher – Candidate Screening and 1st Round of Interviews scheduled
 Connected World – part-time – potential final candidate
 Art – ES – part-time – potential final candidate
 One New EC position is projected to be added to meet the increase in EC needs
 Board approval is requested for the 2019 – 2024 Strategic Plan
 Final Draft of the Strategic Plan is attached for your review

Board approval is requested to install a ceiling at the MS on 1st floor

Middle School 6th Grade classrooms – installation of ceiling proposal to reduce noise and improve safety.

RL Pullen – coordinated by Hedgehog Holdings- Total cost - **\$17,940**

May 1st - school Closing 9 teachers submitted leave requests as of 4/11/19 to participate in the education march in Raleigh

B. Finance	FYI	Ellie Schollmeyer	20 m
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2018-2019 Budget

The Finance committee met to review the year to date expenditures and project future impacts. Based on YTD activity, we are projecting an end of year surplus of **\$78,154.11**. The Board should begin discussions about how to allocate the EOY surplus. The balance sheet and income statement along with the YTD budget report are attached for your review.

2019-2020 Budget

The Finance committee met on 4/3 to discuss the projections for the next year.

The 2019- 2020 Budget first draft is attached for your review and discussion. The projected surplus is estimated to be **\$ 15,076.31** which assumes \$100,000 in revenue from annual fund contributions. Cory Draughan will be attending to review the budget proposal with the Board. Staff salary projections for teachers were calculated using the 2018-2019 state salary guide plus the Exploris School supplement outlined in the ED Report. The average of teacher salaries is \$ 56,410, with an 8% average increase based on the 18-19 state salary guide.

Teaching assistants are projected to receive a 5-6% increase based on the 18-19 state salary guide. Admin and support staff are projected to receive a 3% increase. **Please review the details of the budget and email any questions you may have in advance of the board meeting so that we can be fully prepared to respond and provide additional details.**

V. Center for Innovation 5:40 PM

A. Business Plan Presentation	Discuss	Sonja McKay	20 m
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The Center for Innovation "EDEX Collaboratory" Business plan is attached in the Board packet for your review. Board discussion and review of the business plan and determination of recommended next steps.

VI. PTO Updates 6:00 PM

A. PTO Quarterly Update	FYI	Kimberly Harris	5 m
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PTO Online auction in progress.
 Exploris Family picnic May 4, 2019 at 12 pm at Roberts Park
 Key positions unfilled for next year: President Elect, Annual Fund

2019-2020 PTO Budget Attached for your information.

VII. Facility Updates 6:05 PM

A. Building Updates	FYI	Bob Kingery	15 m
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The board will receive updates based upon meetings over the last 30 days.

VIII. Committee Updates 6:20 PM

A. Development Committee	FYI	Kim Von Weihe	5 m
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The Development committee will share their structure for the upcoming fiscal year.

B. Governance Committee	Discuss	Camesha Jones	5 m
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Provide updates to the board in regards to board openings, officers and recruitment for the 2019 year. The governance committee fielded a survey to gauge parent/guardian opinion on volunteer background checks and willingness to cover cost of background checks. The results of the survey are attached in the Board packet.

Dates: 4th Tuesday or Last Tuesday?
Meeting number (8 or 10?)
State minimum is 8 (Retreat still could count)

C. Educational Excellence Committee	FYI	Keely Byars- Nichols	5 m
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IX. Closing Items 6:35 PM

A. Closing Items and Commitments	Discuss	Tom Miller	5 m
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The next Board meeting will be held on May 28, 2019 - 4:30 pm at the Middle School.

B. Adjourn Meeting	Discuss	Tom Miller	
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X. Closing Items 6:40 PM

A. Adjourn Meeting	Vote		
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Cover Sheet

Approve Minutes

Section: I. Opening Items
Item: C. Approve Minutes
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Board Meeting on March 26, 2019



The Exploris School

Minutes

Board Meeting

Date and Time

Tuesday March 26, 2019 at 4:30 PM

Location

The Exploris School - Middle Campus

Directors Present

B. Kingery, E. Schollmeyer (remote), G. Burnette, J. Frawley, K. Byars-Nichols, K. Furr, K. Harris, K. Johnson (remote), K. Von Weihe, L. Perry Lawless, M. Mitchell-Neal, T. Kingsberry, T. Miller

Directors Absent

C. Hutchens, C. Jones

Guests Present

A. Northrup, M. Parkerson

I. Opening Items

A. Record Attendance and Guests

B. Call the Meeting to Order

T. Miller called a meeting of the board of directors of The Exploris School to order on Tuesday Mar 26, 2019 @ 4:34 PM at The Exploris School - Middle Campus.

C. Approve Minutes

K. Furr made a motion to approve minutes from the Board Meeting on 02-26-19.
K. Byars-Nichols seconded the motion.
The board **VOTED** unanimously to approve the motion.

D. Public Comment Opportunity

No public comments were made.

II. Presentation on Academic Results

A. Academic Update

Michelle Parkerson and Amanda Northrup (Associate Directors) presented an academic update to the Board on student performance, growth, and the use of data to measure results in the elementary and middle grades.

Included in the presentation, related to RIGOR:

- "Exploris Glossary" with key terms germane to the school
- Data sources used to measure educational excellence using the rigor, relevance and relationships framework
- Specific standardized tests, with acronyms, times administered, subjects and grade levels assessed.

They led the board through several activities and discussions to help explain how data is used to inform teaching practice and strategy.

Bob asked how the very comprehensive approach to data at Exploris is different than the approach used at Wake County schools. Both Associate Directors said that while the tests can differ somewhat they used data in similar ways when they taught in Wake County schools.

Amanda let the board know that they assess this sort of standardized data three times a year. She also stated that mid-year data often shows a slump, and that end-of-year shows an upturn.

The Associate Directors also presented data on professional development, classroom/teacher observations.

On RELEVANCE, the associate directors detailed examples of field work, teacher leadership.

On RELATIONSHIPS, the associate directors presented data related to attendance and behavior reports, staff survey data, school sponsored events.

III. ED Report

A. Academic/ Personnel / Operations

- Michael Gilbert-Singletary is being recommended for the Elementary Administrative Assistant / Power School Coordinator position.
- Also recommended that we accept the resignations of part-time Elementary Art Teacher Marie Arondeau and part-time Elementary Global Arts Teacher Renee Anderson effective at the end of the 18-19 school year. Marie is accepting a full-time art position, and Renee is starting a new business.
- Brittney Hartshorn (long-term EC sub) was approved at last meeting has accepted a full-time permanent position with Wake County and will not extend her EC sub role beyond the maternity leave replacement.

T. Miller made a motion to approve the hire of Michael Gilbert-Singletary, effective immediately.

K. Von Weihe seconded the motion.

The board **VOTED** unanimously to approve the motion.

B. Kingery made a motion to approve the land lease extension, as stated, to align with the modulars through Dec. 2020.

K. Furr seconded the motion.

The board **VOTED** unanimously to approve the motion.
Possibly in April, Sonja McKay will present the Center for Innovation Business Plan to the School Foundation Board on February 20, 2019. The Business plan is included in the Board packet for your review.

K. Furr made a motion to maintain Thomas, Judy and Tucker as auditor and tax prepared for school and foundation, for the price proposed.

B. Kingery seconded the motion.

The board **VOTED** unanimously to approve the motion.

B. Finance

After reviewing the year to date expenditures and projecting future impacts, we are projecting an end of year surplus of \$84,961. The balance sheet and income statement along with the YTD budget are attached for your review.

IV. Facility Updates

A. Building Updates

The developers are still shooting for a Spring groundbreaking, but inability to secure funding persists. The school's presence in the building seems to be a major barrier for lenders accepting this project.

The board had consensus that we need to set a deadline for securing funding with SFLA, then decide to look for alternatives.

V. Committee Updates

A. Governance Committee

Kelly reminded board members to recruit new board members.

B. Educational Excellence Committee

At the last (January) EEC meeting, the following updates were provided:

Grant opportunity - Ellie shared that the school is going to pursue a large grant through the state that would help provide supports for ED students. The grant has been submitted, and several members from EEC helped with the project.

Action items for future committee discussion include:

- Funding for student supports (meals, scholarships, etc) since Spicy Green has not generated the revenue anticipated to cover meals
- Additional recommendations for equity training for staff (and board)
- Parent and family engagement (partnering with PTO for events, sponsoring book reads, etc), ongoing Town Halls
- Making information and communication more accessible to all families

Equity and Diversity Committee (subcommittee of EEC) did face-to-face and targeted electronic recruitment efforts leading up to the lottery.

VI. Closing Items

A. Closing and Commitments

Ellie will update board members on strategic presentation, budget, business plan for Center for Innovation.

Kimberly will also include a PTO update.

B. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:22 PM.

Respectfully Submitted,
K. Byars-Nichols

Cover Sheet

Strategic Plan

Section: III. Strategic Plan
Item: A. Strategic Plan
Purpose: Vote
Submitted by:
Related Material: Exploris 2019-2024 Strategic Plan Brochure.pdf

The Exploris™ School

Empowering Learners to Improve Our World



MISSION

The Exploris School is a diverse learning community that engages students in a challenging, relevant, relationship-based education. Through experiential, project-based learning we empower students to foster a just and sustainable world.

VISION

Empowering learners to improve our world.

CORE VALUES

Exploris has been serving students in the downtown Raleigh community for over 20 years and is committed to growing our school in size and diversity to expand support and opportunity for all students. Our educational program is built around four core pillars: Global Education, Project Based Learning, Co-Teaching, and Responsive Classroom. The articulation of our core values ground the school in our educational approach and community partnerships.

Core Values



INNOVATION

In a constantly changing world, the ability to approach challenges in a new way is vital. Exploris teachers and students approach the learning process through divergent thinking, creativity, ideation, and risk-taking.

SOCIAL EMPOWERMENT

Students learn best when they are exposed to meaningful, complex issues that are applicable to their own lives. Teachers engage students in current, relevant issues by solving authentic problems that are being addressed beyond the four walls of the school building. Students realize that they have the power to change how their world works. They know how to navigate public systems, lobby public officials, and present their research and opinions as responsible citizens. Student work is tangibly connected not only to the local community, but to other regions of the world and to past and future events.

CRAFTSMANSHIP

Producing an exemplary product is challenging. It takes attention to detail, grit, perseverance, revision, and tenacity. It takes a growth mindset and a dedication to competing with one's own personal best.

CONNECTIONS TO NATURE

When students witness the power and elements of the natural world through adventure and stewardship, they begin to view themselves as just one species within a larger system.

RELATIONSHIPS

A nurturing school environment is one where students are encouraged to build and maintain positive relationships and collaborate with their teachers, parents, peers, and community. With a keen understanding of the unique development of the age group which they teach, teachers are intentional about the structures and relationship-building activities that they design. Positive relationships and collaboration results in a tapestry of learners who know they can depend on each other and work together in almost any situation. The end-product is deeper, and Exploris students experience a collective sense of accomplishment and ownership.

REFLECTION

In an ever changing world of new ideas, the importance of reflecting on one's own thinking and the thinking of others cannot be underestimated. Exploris values the creation of time to slow down, to reflect, and to build connections.

RESPONSIBILITY

Students take ownership of their learning and accountability for their actions and behavior. Students recognize the importance of character, integrity, and honesty.

CURIOSITY

True knowledge does not occur without curiosity. Students are empowered to ask questions about the world around them and to explore possible answers.

Strategic Goals

STRATEGIC GOAL 1: FAMILY AND COMMUNITY ENGAGEMENT

Increase the number of partnerships with community organizations and parents to support students' academic, social, and emotional needs.

Objective 1.1: Explore grant and research opportunities to support school vision.

Objective 1.2: Partner with local universities to increase education offerings and recruitment of new staff.

Objective 1.3: Partner with community organizations to provide resources for family engagement and wraparound support.

Objective 1.4: Support the development of an innovation center to transform education with other leading educators.

STRATEGIC GOAL 2: FACILITIES

Transition successfully to a new K-8 facility that aligns with our core values and expansion needs.

Objective 2.1: Begin construction in spring 2019.

Objective 2.2: Complete and occupy new building by fall 2021.

Objective 2.3: Develop alternate plan if construction does not begin by September 2019.

Objective 2.4: Develop interior design that meets the changing learning needs of all students and staff.

Objective 2.5: Ensure technology and infrastructure support instructional strategies.

STRATEGIC GOAL 3: FACULTY AND STAFF

Attract and retain innovative and collaborative educators who are involved in shared decision making about issues that impact the success of Exploris and its students.

Objective 3.1: Pay salaries competitive with other schools in the Triangle.

Objective 3.2: Provide teachers with opportunities to develop cultural competencies and remain innovative in education and professional learning.

Objective 3.3: Implement a 360-evaluation process for faculty and staff.

STRATEGIC GOAL 4: STUDENT SUCCESS

Strengthen K-8 curriculum and instruction to embrace diversity and differentiation for achieving academic, social, emotional, and cultural growth.

Objective 4.1: Increase academic support across all subgroups and build capacity to provide students with differentiated instruction, intervention, and enrichment.

Objective 4.2: Create a curriculum plan that guides K-8 instruction.

Objective 4.3: Align essential K-8 social and emotional competencies for successful development.

Objective 4.4: Expand project-based experiences around relevant, community driven, and hands-on learning aligned with curriculum goals.

STRATEGIC GOAL 5: DIVERSITY

Increase the racial and socio-economic diversity of Exploris educators and students to reflect that of Wake County.

Objective 5.1: Develop recruitment plan and remove barriers to increase the racial and socio-economic diversity of students and staff.

Objective 5.2: Secure funding to support needs of diverse school community.

Objective 5.3: Remove barriers for educationally disadvantaged students to ensure access to Exploris for all.

Objective 5.4: Develop strategies for helping students and families engage as community partners.

STRATEGIC GOAL 6: FINANCE

Acquire adequate financial resources to ensure long-term financial sustainability of Exploris.

Objective 6.1: Create a long-term financial plan and identify resources to ensure long-term financial sustainability of Exploris.

Objective 6.2: Develop sustainable operating budget to support strategic goals.

Objective 6.3: Expand the Finance Committee to further develop and execute financial strategies.

Objective 6.4: Create a salary structure for all staff that ensures the long-term financial stability of Exploris and ensures we are among the leading public schools in the Triangle.

Objective 6.5: Identify external sources and create a long-term development fund to support facility costs, and ongoing instructional and student support needs.

Objective 6.6: Ensure that revenue allocated towards facilities expenditures is less than 20 percent.

Cover Sheet

Academic/ Personnel / Operations

Section: IV. ED Report
Item: A. Academic/ Personnel / Operations
Purpose: Vote
Submitted by:
Related Material: ED Report.pdf

ED Report – April 2019

Academic Update:

MAP Testing – April / May
 mClass Testing – May 6 - 28
 EOG Testing Window – May 6 – June 7th

Personnel and Staffing Update:

Positions to be filled:

6th grade Teacher – Final 2 candidates - on site visits in progress
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 Instructional Coach – part-time
 One New EC position is projected to be added to meet the increase in EC needs

Operations:

Board approval is requested to install a ceiling at the MS on 1st floor

Middle School 6th Grade classrooms – installation of ceiling proposal to reduce noise and improve safety.

RL Pullen – coordinated by Hedgehog Holdings- Total cost - **\$17,940**

Additional door code keypads will be ordered to allow for access on 2nd floor and lower level by parking lot. This will allow teachers access to building without disrupting other classes when they enter and exit. Total Cost- \$3,765.06

May 1st – school closing – 29 teachers submitted leave requests as of 4/11/19 to participate in the education march in Raleigh. Optional teacher workday.

Fire Drills:

ES – 3/27/19
 MS- 3/28/19

Enrollment Data for 2018 - 2019:

<u>Total Enrollment</u>										
	K	1	2	3	4	5	6	7	8	
<i>Total</i>	37	36	38	37	37	37	72	76	74	444*

*Changes since March -1 total in 1st grade - move to private school

Breakdown by County

Wake – 423
Johnson – 15
Durham – 4
Pitt- 1
Franklin – 1
Total – 444

Strategic Plan:

Board approval is requested for the 2019 – 2024 Strategic Plan

Final Draft of the Strategic Plan is attached for your review

Timeline:

- Parent / Student Surveys – December / January – Complete
- School Board Focus Group for Strategic Plan – January 29, 2019 – Complete
- All Staff Focus Group – January 30, 2019 – Complete
- Strategic Planning Steering Committee –
 - 2 meetings – February 9 (9am – 1pm) and February 21 (4pm – 6pm) Complete
 - Extra meeting held on March 4 (4pm – 6 pm)
 - Admin Reps - Ellie, Amanda Northrup
 - 2 Elementary Staff Representatives – Leah Ruto, Michelle Duncan, Maggie
 - 2 Middle School Staff Representatives – Cori Greer Banks and Shannon Hardy
 - 3 Board Member Representatives- Tom, Camesha, Theo
 - 1 Parent Representative – Kimberly Harris
- Staff Review of Draft 5 and Feedback Session on 3/13/19
- Final Steering Committee Meeting – 4/4/19

Thank you Tom, Camesha, Theo and Kimberly for serving on the committee.

Finance:

2018-2019 Budget

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to be \$ **15,076.31** which assumes \$100,000 in revenue from annual fund contributions. Cory Draughan will be attending to review the budget proposal with the Board. Staff salary projections for teachers were calculated using the 2018-2019 state salary guide plus the Exploris School supplement outlined below. The average of teacher salaries is \$ 56,410, with an 8% average increase based on the 18-19 state salary guide. Teaching assistants are projected to receive a 5-6% increase based on the 18-19 state salary guide. Admin and support staff are projected to receive a 3% increase. Please review the details of the budget and email any questions you may have in advance of the board meeting so that we can be fully prepared to respond and provide additional details.

Years @ Exploris	Supplement
No License	10%
0-9 years	14%
10-17 years	16%
18-24 years	18%
25+ years	20%
* 5 Years may be transferred in	

Capital Campaign/ Foundation / Center for Innovation

Foundation Account Balance as of 4/16/19 - **\$529,278.85**

Total Gifts Received - \$246,200.53
 School Rollover Contribution - \$304,705.58
 Total Pledges Outstanding - \$82,907.28

We are asking all Board members and Staff members to contribute to the Capital Campaign so that we reach 100% participation. Donations can be made directly on our website linked [here](#) for your convenience. Percent participation ranges as of 1/17/19 are shown below:

Board – 86%
 Staff – 83%
 Families – 71%

Center For Innovation –

Presentation by Sonja McKay. The updated Business Plan for the EdEx Collaborative is attached for your review.

Governance Committee:

The governance committee fielded a survey to gauge parent opinion on conducting background checks for volunteers. As of 4/23/19 we received 146 responses. The summary of the results are attached for your review.

May Board Meeting-

The next School Board meeting will be held on 5/28/19 at 4:30 PM at MS.

Cover Sheet

Finance

Section: IV. ED Report
Item: B. Finance
Purpose: FYI
Submitted by:
Related Material: 03. Board Report 2019.03 Exploris.pdf
05. Income Statement 2019.03 Exploris.pdf
06. Balance Sheet 2019.03 Exploris.pdf
Exploris Draft 19-20 Budget - New Draft Budget (2).pdf

<h1>Exploris</h1>							
<h2>Budget Analysis Report</h2>							
Fiscal Year: 2019 3/01/2019 - 3/31/2019							
Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	
Revenues							
STATE REVENUE	2,655,506.96	249,798.39	2,347,587.82	307,919.14	88.40	2,690,301.68	
LOCAL REVENUE	1,236,666.65	197,012.54	1,039,857.03	196,809.62	84.09	1,338,700.25	
FEDERAL REVENUE	68,164.00	6,256.34	49,702.64	18,461.36	72.92	71,288.00	
FOUNDATION REVENUE	20,580.00	0.00	172.30	20,407.70	0.84	13,010.31	
B&A CARE REVENUE	90,000.00	10,750.00	76,278.61	13,721.39	84.75	90,000.00	
FIELD TRIP REVENUE	0.08	9,597.80	130,951.00	(130,950.92)	163688750.00	130,951.00	
Revenues	4,070,917.69	473,415.07	3,644,549.40	0.00	89.53	4,334,251.24	
Expenses							
Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	
SALARIES AND BONUSES	2,516,923.33	206,383.79	1,845,956.47	670,966.86	73.34	2,529,162.41	
BENEFITS	594,663.26	44,371.36	390,422.06	204,241.20	65.65	585,818.12	
BOOKS AND SUPPLIES	65,810.00	3,215.58	41,152.37	24,657.63	62.53	66,055.13	
TECHNOLOGY	103,544.94	3,210.53	80,899.73	22,645.21	78.13	104,544.94	
NON-CAP EQUIPMENT & LEASES	19,500.00	1,320.94	15,397.31	4,102.69	78.96	19,500.00	
CONTRACTED STUDENT SERVICES	36,500.00	2,996.25	19,998.23	16,501.77	54.79	36,500.00	
FIELD TRIPS	4,000.12	17,231.45	94,443.94	(90,443.82)	2361.03	138,107.00	
STAFF DEVELOPMENT	11,000.00	1,170.00	9,205.94	1,794.06	83.69	13,254.84	
ADMIN SERVICES	105,580.00	9,464.05	133,053.12	(27,473.12)	126.02	158,535.39	
INSURANCES	33,111.00	2,280.00	33,011.40	99.60	99.70	37,597.40	
FACILITIES	462,264.52	38,358.18	365,787.26	96,477.26	79.13	479,573.16	
B&A CARE	39,581.51	4,659.12	29,814.56	9,766.95	75.32	41,256.86	
CLUBS	0.00	216.50	4,872.74	(4,872.74)		5,615.00	
VARIOUS GRANTS-CASMT	40,576.88	0.00	32,146.58	8,430.30	79.22	40,576.88	
Expenses	4,033,055.56	334,877.75	3,096,161.71	0.00	76.77	4,256,097.13	
SURPLUS/(DEFICIT)	37,862.13	138,537.32	548,387.69			78,154.11	

04/06/2019
09:26 PM

THE EXPLORIS SCHOOL

Income Statement

Fiscal Year: 2019 Month: March

Include Fund(s): 1, 2, 3, 5

Fund		Beg. Balance	MTD Actual	YTD Actual
Fund 1				
	Revenue			
	1.3100.016.000.000.000.00 Rev - Summer Reading - 016	1,097.68	0.00	1,097.68
	1.3100.029.000.000.000.00 Rev - Behavioral Support - 029	0.00	215.30	215.30
	1.3100.036.000.000.000.00 Rev - Charter Schools	2,091,308.76	249,583.09	2,340,891.85
	1.3100.048.000.000.000.00 Rev- State Bonus	5,382.99	0.00	5,382.99
	Revenue Total:	2,097,789.43	249,798.39	2,347,587.82
	Expense			
	1.5110.036.121.000.000.00 Salary - Teacher	1,000,600.12	128,175.43	1,128,775.55
	1.5110.036.142.000.000.00 Salary - Teacher Assistant	68,850.46	9,842.92	78,693.38
	1.5110.036.162.000.000.00 Substitute Pay	19,290.00	5,911.00	25,201.00
	1.5110.036.183.000.000.00 Salary - Bonus	0.00	0.00	0.00
	1.5110.036.211.000.000.00 ER's Social Security Cost	77,332.04	10,324.01	87,656.05
	1.5110.036.229.000.000.00 ER's Other Retirement Cost	19,082.99	2,460.28	21,543.27
	1.5110.036.229.100.000.00 ER's Other Retirement Cost- CONTINGENCY	0.00	0.00	0.00
	1.5110.036.231.000.000.00 ER's Hospitalization Insurance	118,608.29	15,867.34	134,475.63
	1.5110.036.232.000.000.00 ER's Workers' Comp. Insurance	0.00	0.00	0.00
	1.5110.036.233.000.000.00 ER's Unemployment Insurance Co	0.00	0.00	0.00
	1.5110.036.234.000.000.00 ER's Dental Ins. Cost	1,871.90	259.35	2,131.25
	1.5110.036.235.000.000.00 ER's Life Ins. Cost	136.35	0.00	136.35
	1.5110.036.239.000.000.00 Other Ins. Cost	695.44	0.00	695.44
	1.5110.036.299.000.000.00 Long Term Disability	347.57	0.00	347.57
	1.5110.036.315.000.000.00 Reproduction Costs	630.00	0.00	630.00
	1.5110.036.411.000.000.00 Supplies and Materials	2,247.86	0.00	2,247.86
	1.5110.036.418.000.000.00 Computer Software and Supplies	3,320.00	0.00	3,320.00
	1.5110.048.180.000.000.00 Testing Bonus	4,000.00	0.00	4,000.00
	1.5110.048.211.000.000.00 ER's Social Security Cost	305.99	0.00	305.99
	1.5210.029.162.000.000.00 Substitute Pay	0.00	200.00	200.00
	1.5210.029.211.000.000.00 ER's Social Security Cost	0.00	15.30	15.30
	1.5210.036.121.000.000.00 Salary - EC Teacher	92,572.04	2,116.94	94,688.98
	1.5210.036.142.000.000.00 Salary - EC Teacher Assistant	67,600.08	8,900.01	76,500.09
	1.5210.036.211.000.000.00 ER's Social Security Cost	11,294.25	790.36	12,084.61

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THE EXPLORIS SCHOOL**Income Statement****Fiscal Year: 2019 Month: March****Include Fund(s): 1, 2, 3, 5**

Fund		Beg. Balance	MTD Actual	YTD Actual
1.5210.036.229.000.000.00	ER's Other Retirement Cost	955.00	159.25	1,114.25
1.5210.036.231.000.000.00	ER's Hospitalization Insurance	27,174.89	3,550.58	30,725.47
1.5210.036.234.000.000.00	ER's Dental Ins. Cost	342.03	46.92	388.95
1.5210.036.311.000.000.00	Contracted Services - EC	1,895.74	0.00	1,895.74
1.5210.036.312.000.000.00	Workshop Expenses	0.00	0.00	0.00
1.5210.036.317.000.000.00	Contracted Psychological Servi	0.00	0.00	0.00
1.5240.036.318.000.000.00	Contracted Services - Speech	6,366.25	0.00	6,366.25
1.5330.036.121.000.000.00	Intervention Teacher	35,257.36	4,407.17	39,664.53
1.5330.036.211.000.000.00	Intervention SS	2,457.12	308.48	2,765.60
1.5330.036.229.000.000.00	Intervention Other Retirement	1,057.76	132.22	1,189.98
1.5330.036.231.000.000.00	Intervention Hospitalization	4,177.60	522.20	4,699.80
1.5330.036.234.000.000.00	ER' Dental	98.80	12.35	111.15
1.5350.016.121.000.000.00	Teacher - Summer Reading Camp	818.54	0.00	818.54
1.5350.016.211.000.000.00	ER SS - Summer Reading Camp	279.14	0.00	279.14
1.5350.016.411.000.000.00	Supplies and Materials - 016	0.00	0.00	0.00
1.5400.036.151.000.000.00	Salary - Office Personnel	70,666.15	9,989.12	80,655.27
1.5400.036.211.000.000.00	ER's Social Security Cost	5,206.90	736.80	5,943.70
1.5400.036.229.000.000.00	ER's Other Retirement Cost	1,494.92	238.43	1,733.35
1.5400.036.231.000.000.00	ER's Hospitalization Insurance	9,399.60	1,044.40	10,444.00
1.5400.036.234.000.000.00	ER's Dental Ins. Cost	210.34	24.70	235.04
1.5400.036.411.000.000.00	Supplies and Materials - Offic	1,046.37	0.00	1,046.37
1.5410.036.114.000.000.00	Salary - Principal/Headmaster	73,333.36	9,166.67	82,500.03
1.5410.036.211.000.000.00	ER's SS	5,520.60	690.13	6,210.73
1.5410.036.229.000.000.00	ER's Other Retirement	2,200.00	275.00	2,475.00
1.5410.036.231.000.000.00	ER's Hospitalization	4,177.60	522.20	4,699.80
1.5410.036.234.000.000.00	ER's Dental	98.80	12.35	111.15
1.5410.048.180.000.000.00	Bonus - 048	1,000.00	0.00	1,000.00
1.5410.048.211.000.000.00	ER's Social Security Cost	77.00	0.00	77.00
1.5420.036.116.000.000.00	Salary - Assistant Principal	90,706.00	11,338.25	102,044.25
1.5420.036.211.000.000.00	ER's SS	6,772.49	845.54	7,618.03
1.5420.036.229.000.000.00	ER's Other Retirement	2,441.70	312.20	2,753.90
1.5420.036.231.000.000.00	ER's Hospitalization	8,355.20	1,044.40	9,399.60
1.5420.036.234.000.000.00	ER's Dental	98.80	12.35	111.15

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THE EXPLORIS SCHOOL

Income Statement

Fiscal Year: 2019 Month: March

Include Fund(s): 1, 2, 3, 5

Fund		Beg. Balance	MTD Actual	YTD Actual
1.5830.036.131.000.000.00	Guidance Counselor	58,156.68	4,825.14	62,981.82
1.5830.036.131.001.000.00	Salary - Guidance Counselor Grant	4,888.89	4,888.89	9,777.78
1.5830.036.211.000.000.00	ER SS	4,332.61	354.18	4,686.79
1.5830.036.211.001.000.00	ER SS	374.00	374.00	748.00
1.5830.036.231.000.000.00	ER's Hospitalization	4,177.60	522.20	4,699.80
1.5830.036.234.000.000.00	ER's Dental Insurance Cost	98.80	12.35	111.15
1.6110.036.113.000.000.00	Curriculum Support & Dev	17,166.64	2,145.83	19,312.47
1.6110.036.211.000.000.00	ER's SS	1,313.23	164.16	1,477.39
1.6400.036.311.000.000.00	Contracted Services - Technolo	6,000.00	0.00	6,000.00
1.6510.036.341.000.000.00	Telephone	127.98	0.00	127.98
1.6530.036.321.000.000.00	Utilities - Electrical Service	2,563.12	0.00	2,563.12
1.6530.036.323.000.000.00	Utilities -Water and Sewer	480.00	0.00	480.00
1.6540.036.311.000.000.00	Contracted Services - Custodi	9,600.00	0.00	9,600.00
1.6540.036.411.000.000.00	Supplies and Materials	2,426.41	0.00	2,426.41
1.6580.036.325.001.000.00	Contracted Landscaping	0.00	0.00	0.00
1.6580.036.422.000.000.00	Repair Parts and Materials	27.87	0.00	27.87
1.6610.036.311.000.000.00	Contracted Services - Business	8,748.90	0.00	8,748.90
1.6610.036.371.000.000.00	Liability Insurance	9,866.02	0.00	9,866.02
1.6610.036.378.000.000.00	Scholastic Accident Insurance	0.00	0.00	0.00
1.6620.036.311.000.000.00	Contracted Services - HR	232.21	0.00	232.21
1.6920.036.311.000.000.00	Contracted Legal Services	591.32	0.00	591.32
1.6930.036.311.000.000.00	Contracted Audit Services	2,750.00	0.00	2,750.00
1.6940.036.327.000.000.00	Building Rentals & Leases	81,263.85	0.00	81,263.85
1.6940.036.327.001.000.00	Land Lease New Bern	30,750.00	0.00	30,750.00
1.6940.036.327.002.000.00	Modular Lease	7,934.40	0.00	7,934.40
1.6950.036.313.000.000.00	Advertising Cost	0.00	0.00	0.00
Expense Total:		2,106,341.97	243,541.40	2,349,883.37
Change in Fund 1 Balance:		(8,552.54)	6,256.99	(2,295.55)

Fund 2

Revenue

2.3250.036.000.000.000.00	Rev - Sales Tax	0.00	0.00	0.00
2.4110.435.000.000.000.00	Rev - Durham County Schools	9,365.76	1,170.72	10,536.48

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THE EXPLORIS SCHOOL**Income Statement****Fiscal Year: 2019 Month: March****Include Fund(s): 1, 2, 3, 5**

Fund		Beg. Balance	MTD Actual	YTD Actual
2.4110.439.000.000.000.00	Rev - Franklin County Schools	543.18	519.74	1,062.92
2.4110.447.000.000.000.00	Rev - Harnett County Schools	0.00	0.00	0.00
2.4110.456.000.000.000.00	Rev - Johnston County Schools	13,014.09	2,200.32	15,214.41
2.4110.482.000.000.000.00	Rev - Pitt County Schools	984.18	164.03	1,148.21
2.4110.502.000.000.000.00	Rev - Wake County Schools	687,964.84	192,482.97	880,447.81
2.4211.036.000.901.000.00	Rev - Field Trips - KI-01	410.00	0.00	410.00
2.4211.036.000.903.000.00	Rev - Field Trips - 02-03	130.00	491.00	621.00
2.4211.036.000.905.000.00	Rev - Field Trips - 04-05	4,725.18	1,044.80	5,769.98
2.4211.036.000.906.000.00	Rev - Field Trips - 06	5,924.20	2,455.00	8,379.20
2.4211.036.000.907.000.00	Rev - Field Trips - 07	23,596.32	1,575.00	25,171.32
2.4211.036.000.907.100.00	Rev - F/T - 7th Fundraising	0.00	0.00	0.00
2.4211.036.000.908.000.00	Rev - Field Trips - 08	54,829.50	63.00	54,892.50
2.4211.036.000.908.100.00	Rev - F/T - 8th Fundraising	0.00	44.00	44.00
2.4211.036.000.930.000.00	Rev - Field Trips - Japan	18,175.00	2,725.00	20,900.00
2.4211.036.000.931.000.00	Rev - Field Trips - Germany	13,563.00	1,200.00	14,763.00
2.4430.036.000.000.000.00	Rev - Contributions	12,865.33	130.40	12,995.73
2.4430.036.004.000.000.00	Rev - PTO Donations	(1,301.00)	0.00	(1,301.00)
2.4430.690.000.000.000.00	REV- CAPITAL CAMPAIGN FOUNDATI	172.30	0.00	172.30
2.4450.036.000.001.000.00	Interest Income Reserve	177.11	25.36	202.47
2.4490.036.000.000.000.00	Rev - Various	616.00	319.00	935.00
2.4490.352.000.000.000.00	Rev - Foundation/PTO	0.00	0.00	0.00
2.4490.352.000.100.000.00	Rev - Foundation Financial Reporting Contrib	0.00	0.00	0.00
2.4493.036.000.000.000.00	Rev - Clubs	5,615.00	0.00	5,615.00
2.4890.559.000.000.000.00	Rev - CASMT Grant	25,000.00	0.00	25,000.00
2.4910.036.000.000.000.00	Fund Balance Appropriated - Legal	52,000.00	0.00	52,000.00
2.4910.036.000.002.000.00	Fund Balance Appropriated - Tech	36,000.00	0.00	36,000.00
2.4910.036.000.003.000.00	Fund Balance Appropriated - Capital Improvement	0.00	0.00	0.00
2.4910.559.000.000.000.00	Fund Balance Appropriated CASMT	0.00	0.00	0.00
Revenue Total:		964,369.99	206,610.34	1,170,980.33
Expense				
2.5110.036.121.000.000.00	Salary - Teacher	25.00	0.00	25.00

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THE EXPLORIS SCHOOL**Income Statement****Fiscal Year: 2019 Month: March****Include Fund(s): 1, 2, 3, 5**

Fund		Beg. Balance	MTD Actual	YTD Actual
2.5110.036.121.001.000.00	Salary - Teacher Homebound	175.00	0.00	175.00
2.5110.036.211.000.000.00	ER's Social Security Cost	1.47	0.00	1.47
2.5110.036.211.001.000.00	ER's Social Security	11.58	0.00	11.58
2.5110.036.229.000.000.00	ER's Other Retirement Cost	(124.12)	0.00	(124.12)
2.5110.036.231.000.000.00	ER's Hospitalization Insurance	4,729.77	477.20	5,206.97
2.5110.036.232.000.000.00	ER's Workers' Comp. Insurance	7,489.00	2,280.00	9,769.00
2.5110.036.233.000.000.00	ER's Unemployment Insurance Co	1,503.87	0.00	1,503.87
2.5110.036.235.000.000.00	ER's Life Ins. Cost	990.16	145.44	1,135.60
2.5110.036.239.000.000.00	Other Ins. Cost	4,530.78	904.99	5,435.77
2.5110.036.299.000.000.00	Long Term Disability	2,817.92	0.00	2,817.92
2.5110.036.311.901.000.00	Scholarships - KI-01	0.00	0.00	0.00
2.5110.036.311.903.000.00	Scholarships - 02-03	0.00	0.00	0.00
2.5110.036.311.905.000.00	Scholarships - 04-05	0.00	0.00	0.00
2.5110.036.311.906.000.00	Scholarships - 06	0.00	0.00	0.00
2.5110.036.311.907.000.00	Scholarships - 07	0.00	0.00	0.00
2.5110.036.311.908.000.00	Scholarships - 08	0.00	0.00	0.00
2.5110.036.312.000.000.00	Workshop Expenses	6,006.00	370.00	6,376.00
2.5110.036.315.000.000.00	Reproduction Costs	11,066.46	1,287.95	12,354.41
2.5110.036.326.000.000.00	Contracted Repairs - Equipment	0.00	0.00	0.00
2.5110.036.333.901.000.00	Field Trips - KI-01	447.99	0.00	447.99
2.5110.036.333.903.000.00	Field Trips - 02-03	320.00	0.00	320.00
2.5110.036.333.905.000.00	Field Trips - 04-05	603.78	355.00	958.78
2.5110.036.333.906.000.00	Field Trips - 06	885.91	8,000.00	8,885.91
2.5110.036.333.907.000.00	Field Trips - 07	12,038.34	8,793.97	20,832.31
2.5110.036.333.908.000.00	Field Trips - 08	25,424.13	0.00	25,424.13
2.5110.036.333.930.000.00	Field Trips - Japan	20,166.40	82.48	20,248.88
2.5110.036.333.930.100.00	Field Trips - Japan Scholarships	0.00	0.00	0.00
2.5110.036.333.931.000.00	Field Trips - Germany	17,325.94	0.00	17,325.94
2.5110.036.333.931.100.00	Field Trips - Germany Scholarships	0.00	0.00	0.00
2.5110.036.361.000.000.00	Membership Dues and Fees	50.00	0.00	50.00
2.5110.036.411.000.000.00	Supplies and Materials	13,453.57	966.67	14,420.24
2.5110.036.418.000.000.00	Computer Software and Supplies	15,449.95	0.00	15,449.95
2.5110.036.461.000.000.00	Non-Cap Inst. Equipment	2,379.91	32.99	2,412.90

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THE EXPLORIS SCHOOL**Income Statement****Fiscal Year: 2019 Month: March****Include Fund(s): 1, 2, 3, 5**

Fund		Beg. Balance	MTD Actual	YTD Actual
2.5110.036.462.000.000.00	Non-Cap Computer Hardware	37,078.58	0.00	37,078.58
2.5110.559.181.000.000.00	Salary - Stipend - CASMT	25,000.00	0.00	25,000.00
2.5110.559.211.000.000.00	ER's Social Security - CASMT	1,912.50	0.00	1,912.50
2.5110.559.312.000.000.00	Workshop Expense - CASMT	5,234.08	0.00	5,234.08
2.5210.036.311.000.000.00	Contracted Services - EC	239.74	0.00	239.74
2.5210.036.312.000.000.00	Workshop Expenses	562.60	0.00	562.60
2.5210.036.317.000.000.00	Contracted Psychological Servi	2,040.00	0.00	2,040.00
2.5210.036.411.000.000.00	Supplies and Materials	(1,274.88)	168.00	(1,106.88)
2.5240.036.318.000.000.00	Contracted Services - Speech	6,310.25	2,996.25	9,306.50
2.5400.036.231.000.000.00	ER's Hospitalization Insurance	477.20	0.00	477.20
2.5400.036.332.000.000.00	Travel Reimbursement	12.50	0.00	12.50
2.5400.036.343.000.000.00	Telecommunications Services	358.82	52.48	411.30
2.5400.036.361.000.000.00	Membership Dues and Fees	209.29	0.00	209.29
2.5400.036.411.000.000.00	Supplies and Materials - Offic	3,188.54	234.15	3,422.69
2.5400.036.418.000.000.00	Computer Software and Supplies	259.75	0.00	259.75
2.5400.036.459.000.000.00	Food Purchase - Office	1,195.61	118.54	1,314.15
2.5400.036.461.000.000.00	Non-Cap Furniture and Equipmen	0.00	0.00	0.00
2.5400.036.462.000.000.00	Non-Cap Computer Hardware	213.15	158.05	371.20
2.5400.435.471.000.000.00	S/T - Durham County	2,791.84	0.00	2,791.84
2.5400.502.471.000.000.00	S/T - Wake County	1,690.86	196.52	1,887.38
2.5502.036.411.000.000.00	Supplies and Materials - Arts	191.74	0.00	191.74
2.5503.036.311.000.000.00	Contracted Services - Clubs	2,400.00	0.00	2,400.00
2.5503.036.333.000.000.00	Field Trips - Clubs	716.65	0.00	716.65
2.5503.036.361.000.000.00	Membership Dues & Fees - Clubs	330.00	0.00	330.00
2.5503.036.411.000.000.00	Supplies and Materials - Clubs	1,209.59	216.50	1,426.09
2.5503.352.327.000.000.00	Rentals/Leases - PTO	0.00	0.00	0.00
2.5503.352.411.000.000.00	Supplies and Materials - PTO	10,770.00	0.00	10,770.00
2.5840.036.411.000.000.00	Supplies and Materials	782.32	0.00	782.32
2.5850.036.345.000.000.00	Security Monitoring	3,786.68	579.00	4,365.68
2.6400.036.311.000.000.00	Contracted Services - Technolo	15,008.95	3,000.00	18,008.95
2.6510.036.341.000.000.00	Telephone	127.98	0.00	127.98
2.6510.036.342.000.000.00	Postage	344.57	281.70	626.27
2.6530.036.321.000.000.00	Utilities - Electrical Service	11,571.20	2,342.25	13,913.45

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THE EXPLORIS SCHOOL**Income Statement****Fiscal Year: 2019 Month: March****Include Fund(s): 1, 2, 3, 5**

Fund		Beg. Balance	MTD Actual	YTD Actual
2.6530.036.323.000.000.00	Utilities -Water and Sewer	3,063.80	487.99	3,551.79
2.6540.036.311.000.000.00	Contracted Services - Custodi	11,175.00	2,100.00	13,275.00
2.6540.036.411.000.000.00	Supplies and Materials	4,267.08	596.02	4,863.10
2.6570.690.526.000.000.00	Foundation - Architect Fees	2,500.00	0.00	2,500.00
2.6580.036.325.000.000.00	Contracted Repairs and Mainten	830.29	397.82	1,228.11
2.6580.036.325.002.000.00	Contracted Pest Control	560.00	80.00	640.00
2.6580.036.325.003.000.00	Contracted Maint- Fire Inspect	2,155.90	352.00	2,507.90
2.6580.036.422.000.000.00	Repair Parts and Materials	698.36	70.00	768.36
2.6610.036.311.000.000.00	Contracted Services - Business	14,754.98	2,625.00	17,379.98
2.6610.036.362.000.000.00	Bank Service Fees	1,012.34	0.00	1,012.34
2.6610.036.362.000.000.20	Bank Service Fees 4317	35.00	0.00	35.00
2.6610.036.371.000.000.00	Liability Insurance	10,069.98	0.00	10,069.98
2.6610.036.376.000.000.00	International Travel Insurance	590.00	0.00	590.00
2.6610.036.378.000.000.00	Scholastic Accident Insurance	2,716.40	0.00	2,716.40
2.6620.036.311.000.000.00	Contracted Services - Personne	368.77	54.10	422.87
2.6910.036.411.000.000.00	Supplies and Materials - Board	11,760.31	1,250.00	13,010.31
2.6920.036.311.000.000.00	Contracted Legal Services	60,834.20	200.45	61,034.65
2.6930.036.311.000.000.00	Contracted Audit Services	9,134.00	0.00	9,134.00
2.6940.036.327.000.000.00	Building Rentals & Leases	66,448.67	22,265.90	88,714.57
2.6940.036.327.001.000.00	Land Lease New Bern	15,300.00	0.00	15,300.00
2.6940.036.327.002.000.00	Modular Lease	72,236.64	9,439.20	81,675.84
2.6940.036.332.000.000.00	Travel - Parking	2,189.75	0.00	2,189.75
2.6950.690.311.001.000.00	Foundation - The Center for Innovation Services	5,736.20	6,232.50	11,968.70
2.6950.690.411.000.000.00	Foundation - Supplies & Materials	1,373.25	0.00	1,373.25
2.6950.690.418.000.000.00	Foundation Computer Software	2,592.00	0.00	2,592.00
2.7100.036.311.000.000.00	Contracted Community Services	150.00	0.00	150.00
2.7200.036.459.000.000.00	Other Food Purchases - F&R Lunch	181.25	0.00	181.25
2.8100.036.715.000.000.00	Transfer FCIT 6528	(88,000.00)	0.00	(88,000.00)
2.8100.036.715.001.000.00	Transfer Reserve Account	88,000.00	0.00	88,000.00
Expense Total:		585,243.09	80,191.11	665,434.20
Change in Fund 2 Balance:		379,126.90	126,419.23	505,546.13

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THE EXPLORIS SCHOOL

Income Statement

Fiscal Year: 2019 Month: March

Include Fund(s): 1, 2, 3, 5

Fund		Beg. Balance	MTD Actual	YTD Actual	
Fund 3					
Revenue					
	3.3600.060.000.000.000.00	Rev - IDEA VI-B - 060	41,598.92	5,456.34	47,055.26
	3.3600.118.000.000.000.00	Rev - IDEA VIB Targeted Assist	1,847.38	800.00	2,647.38
		Revenue Total:	43,446.30	6,256.34	49,702.64
Expense					
	3.5210.060.121.000.000.00	Salary - EC Teacher	34,151.36	4,268.92	38,420.28
	3.5210.060.211.000.000.00	ER's Social Security Cost	2,473.56	308.99	2,782.55
	3.5210.060.229.000.000.00	ER's Retirement	1,024.56	128.07	1,152.63
	3.5210.060.231.000.000.00	ER's Hospitalization	4,177.60	522.20	4,699.80
	3.5210.118.163.000.000.00	Salary - Sub Staff Dev Pay PRC 118	315.00	207.50	522.50
	3.5210.118.211.000.000.00	ER's Social Security Cost	0.00	15.88	15.88
	3.5210.118.312.000.000.00	Workshop Expenses - PRC 118	1,454.84	800.00	2,254.84
	3.5210.118.411.000.000.00	Supplies - PRC 118	77.54	0.00	77.54
		Expense Total:	43,674.46	6,251.56	49,926.02
		Change in Fund 3 Balance:	(228.16)	4.78	(223.38)
Fund 5					
Revenue					
	5.4210.701.000.000.000.00	Rev - Before & After School	65,528.61	10,750.00	76,278.61
		Revenue Total:	65,528.61	10,750.00	76,278.61
Expense					
	5.5350.701.178.000.000.00	Salary - B & A Care	23,579.60	4,366.00	27,945.60
	5.5350.701.211.000.000.00	ER's Soc Sec Cost - B & A Care	1,575.84	293.12	1,868.96
	5.5350.701.231.000.000.00	ER's Hospitalization	859.15	232.08	1,091.23
	5.5350.701.234.000.000.00	Dental	9.85	2.48	12.33
		Expense Total:	26,024.44	4,893.68	30,918.12
		Change in Fund 5 Balance:	39,504.17	5,856.32	45,360.49

THE EXPLORIS SCHOOL**Balance Sheet****Fiscal Year: 2019 | Fiscal Month: March****Include Funds: All****Assets**

1.1010.000.000.000.000.00	Cash OP FCIT 6528	(720.63)
2.1010.000.000.000.000.00	Cash OP FCIT 6528	727,922.05
2.1011.000.000.000.000.00	Cash - Reserve	199,073.28
2.1020.000.000.000.000.00	Cash CK FCIT 4317	11,674.55
2.1160.000.000.000.000.00	Accounts Receivable - Non-Gove	(534.51)
2.1180.000.000.000.000.00	Accounts Receivable - Employee	1,787.84
2.1611.000.000.000.000.00	Security Deposit	15,658.00
3.1010.000.000.000.000.00	Cash OP FCIT 6528	(223.38)
5.1010.000.000.000.000.00	Cash OP FCIT 6528	325,903.17

TOTAL Assets: **1,280,540.37****Liabilities**

1.2210.000.000.000.000.00	EEs' FICA Taxes - EFTPS	(650.60)
1.2230.000.000.000.000.00	Federal Withholding Taxes - EF	(254.63)
1.2240.000.000.000.000.00	State Withholding Taxes - NC E	(167.00)
1.2274.000.000.000.000.00	EEs' Dental Ins. Deductions	2,356.63
1.2278.000.000.000.000.00	EEs' Other Ins. Deductions	290.52
2.2010.000.000.000.000.00	Accounts Payable	(111.50)
5.2274.000.000.000.000.00	EEs' Dental Ins. Deductions	9.92
5.2278.000.000.000.000.00	EEs' Other Ins. Deductions	1.66

TOTAL Liabilities: **1,475.00****Reserves and Equity**

2.2960.000.000.000.000.00	Fund Equity	450,146.58
5.2960.000.000.000.000.00	Fund Equity	280,531.10

TOTAL Reserves and Equity: **730,677.68****NET GAIN (LOSS):** **548,387.69****TOTAL LIABILITIES / RESERVES / INCOME:** **1,280,540.37**

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
Revenues					
STATE REVENUE					
Rev - Charter Schools - 036		2,649,781.96	2,678,479.00	2,663,358.80	
Rev - Summer Reading- 016		5,725.00	11,822.68	12,375.00	
STATE REVENUE		2,655,506.96	2,690,301.68	2,675,733.80	64.11%
LOCAL REVENUE					
Fund Balance Allocation Computer Equipment		36,000.00	36,000.00		
Fund Balance Allocation for Capital Improvements		0.01	0.01		
Fund Balance Allocation Legal Expenses		20,000.00	52,000.00		
Interest Income Reserve		100.00	177.11		
Rev - CASMT Fund Balance Roll Forward		13,664.38	13,664.38		
Rev - CASMT Grant		26,912.50	26,912.50		
Rev - Clubs		0.00	5,615.00		
Rev - Annual Fund				100,000.00	
Rev - Contributions		0.00	12,180.33		
Rev - Durham County Schools		10,986.76	14,048.64	13,727.04	
Rev - Franklin County		0.00	1,770.10	2,173.08	
Rev - Harnett County Schools		3,258.00	0.00	0.00	
Rev - Johnston County Schools		29,693.54	24,543.00	24,795.00	
Rev - Pitt County		0.00	1,640.30	1,968.36	
Rev - Sales Tax		6,570.00	6,570.00	6,570.00	
Rev - Wake County Schools		1,089,481.46	1,153,602.24	1,177,423.20	
LOCAL REVENUE		1,236,666.65	1,348,723.61	1,326,656.68	31.78%
FEDERAL REVENUE					
Rev - IDEA VI-B - 060		68,164.00	68,007.00	75,000.00	
Rev - PRC 118		0.00	3,281.00		
FEDERAL REVENUE		68,164.00	71,288.00	75,000.00	1.80%
FOUNDATION REVENUE					
Foundation Financial Reporting Contribution		2,400.00	12,201.45	3,900.00	
Foundation Marketing Contribution		4,000.00	0.00	2,600.00	
Foundation PTO Contribution		14,180.00	0.00		
FOUNDATION REVENUE		20,580.00	12,201.45	6,500.00	0.16%
B&A CARE REVENUE					
Revenue - Before and After School		90,000.00	90,000.00	90,000.00	

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
B&A CARE REVENUE		90,000.00	90,000.00	90,000.00	2.16%
FIELD TRIP REVENUE					
Rev - Field Trips - 6th Collected		0.01	5,924.20		
Rev - Field Trips - 7th Collected		0.01	23,596.32		
Rev - Field Trips - 7th Fundraising		0.01	0.00		
Rev - Field Trips - 8th Collected		0.01	54,829.50		
Rev - Field Trips - 8th Fundraising		0.01	0.00		
Rev - Field Trips - Elementary School		0.01	5,265.18		
Rev - Field Trips - Japan Exch		0.01	18,175.00		
Rev - German Exch		0.01	13,563.00		
FIELD TRIP REVENUE		0.08	121,353.20	0.00	0.00%
Revenues		4,070,917.69	4,333,867.94	4,173,890.48	100.00%
Expenses					
Account		Budget	EOY Projection		
SALARIES AND BONUSES					
Salary - Administration		587,725.73	566,175.08	535,801.40	
Salary - Bonus		5,000.00	6,000.00	6,000.00	
Salary - EC Teacher		192,001.20	192,141.20	259,866.05	
Salary - EC Teacher Assistant		104,000.00	103,200.12	108,360.00	
Salary - Substitute		25,000.00	31,500.00	25,000.00	
Salary - Teacher		1,524,726.40	1,524,601.90	1,618,983.58	
Salary - PRC 016			6,097.68	0.00	
Salary - Teacher Assistant		78,470.00	108,222.14	98,432.50	
SALARIES AND BONUSES		2,516,923.33	2,537,938.12	2,652,443.53	63.55%
	\$2,652,443.53				
BENEFITS					
Dental Cost		6,226.08	6,226.08	6,412.86	
Hospitalization Cost		303,499.20	303,499.20	317,200.00	
Life Insurance Cost		1,597.00	1,597.00	1,644.91	
Long Term Disability		4,127.00	4,127.00	4,250.81	
Other Retirement Contingency		25,624.25	25,624.25	22,909.46	
Other Retirement Cost		47,587.89	47,587.89	55,733.85	
Short Term Disability Insurance Cost		8,247.00	8,247.00	8,494.41	

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
Social Security Cost		186,308.44	179,747.34	200,540.43	
Unemployment Cost		11,446.40	11,446.40	12,320.78	
BENEFITS		594,663.26	588,102.16	629,507.51	15.08%
BOOKS AND SUPPLIES					
Board of Directors Supplies		13,000.00	13,000.00	13,000.00	
EC Instructional Supplies		1,642.50	1,642.50	1,500.00	
Health Supplies		547.50	782.32	750.00	
Instructional Supplies		24,090.00	24,090.00	1,000.00	
Memberships		547.50	547.50	1,750.00	
Office Food Purchases		1,642.50	1,642.50	1,650.00	
Office Supplies		9,855.00	9,855.00	10,000.00	
Postage		2,190.00	2,190.00	2,190.00	
PRC 016 Instructional Supplies		5,725.00	5,725.00	12,375.00	
Kindergarten				1,000.00	
1st Grade				1,000.00	
2nd Grade				1,000.00	
3rd Grade				1,000.00	
4th Grade				1,000.00	
5th Grade				1,000.00	
6th Grade				2,000.00	
7th Grade				2,000.00	
8th Grade				2,000.00	
Art				1,500.00	
Connected World				1,500.00	
Explorations				500.00	
Movement & Wellness (POE)				2,000.00	
Music				500.00	
Counselor				1,500.00	
Intervention				500.00	
Sales Tax Expense		6,570.00	6,570.00	6,570.00	
BOOKS AND SUPPLIES		65,810.00	66,044.82	70,785.00	1.70%
TECHNOLOGY					
Instructional Software		21,900.00	21,900.00	24,000.00	
Internet Services		1,979.94	2,979.94	2,900.00	
IT Contracted Services		36,000.00	36,000.00	38,000.00	
Non-Cap Computer Hardware		38,190.00	38,190.00	10,000.00	
Non-Cap Office Computer Hardware		1,095.00	1,095.00	1,000.00	

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
Office Software		4,380.00	4,380.00	4,200.00	
TECHNOLOGY		103,544.94	104,544.94	80,100.00	1.92%
NON-CAP EQUIPMENT & LEASES					
Equipment Repairs		300.00	300.00	300.00	
Instructional Equipment		5,000.00	5,000.00	5,000.00	
Office Equipment		1,000.00	1,000.00	1,000.00	
Reproduction Costs		13,200.00	13,200.00	14,000.00	
NON-CAP EQUIPMENT & LEASES		19,500.00	19,500.00	20,300.00	0.49%
CONTRACTED STUDENT SERVICES					
F/R Lunch Services		0.00	0.00	40,000.00	
Contracted Community Services (ESY & Comp Ed)		3,500.00	3,500.00	1,500.00	
OT Services		6,000.00	6,000.00	6,000.00	
Psychological Services		10,000.00	10,000.00	10,000.00	
Speech Services		17,000.00	17,000.00	18,000.00	
CONTRACTED STUDENT SERVICES		36,500.00	36,500.00	75,500.00	1.81%
FIELD TRIPS					
Field Trips - Elementary		0.01	5,265.18		
Field Trips - German Exchange		2,000.00	13,563.00		
Field Trips - German Exchange Scholarship		0.01	2,000.00		
Field Trips - Grade 6		0.01	5,924.20		
Field Trips - Grade 6 Scholarship		0.01	500.00	500.00	
Field Trips - Grade 7		0.01	23,596.32		
Field Trips - Grade 7 Scholarship		0.01	500.00	500.00	
Field Trips - Grade 8		0.01	54,829.50		
Field Trips - Grade 8 Scholarship		0.01	0.00	1,000.00	
Field Trips - Japan Exchange		2,000.00	18,175.00	2,000.00	
Field Trips - Japan Exchange Scholarship		0.01	2,000.00		
Scholarships 00-01		0.01	2,000.00	100.00	
Scholarships 02-03		0.01	100.00	100.00	
Scholarships 04-05		0.01	100.00	100.00	
FIELD TRIPS		4,000.12	128,553.20	4,300.00	0.10%
STAFF DEVELOPMENT					
EC Workshop Expenses		1,000.00	1,000.00	1,000.00	
PRC 118 Workshop Expenses		0.00	1,454.84		
Workshop Expenses		10,000.00	10,000.00	10,000.00	

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
STAFF DEVELOPMENT		11,000.00	12,454.84	11,000.00	0.26%
ADMIN SERVICES					
Advertising		4,000.00	4,000.00	4,000.00	
Audit Services		10,500.00	15,200.00	12,000.00	
Bank Fees		2,000.00	2,000.00	500.00	
Financial Services		36,400.00	42,900.00	38,000.00	
Fire Inspection Fees		3,000.00	3,000.00	3,000.00	
Foundation Expenses		0.00	12,201.45	6,500.00	
Human Resources		500.00	600.98	650.00	
Legal Services		35,000.00	67,000.00	15,000.00	
Philanthropy		0.00	0.00	0.00	
PTO Expenses		14,180.00	10,770.00		
ADMIN SERVICES		105,580.00	157,672.43	79,650.00	1.91%
INSURANCES					
General Liability		20,140.00	22,652.40	21,000.00	
International Travel Insurance		500.00	590.00	600.00	
Student Accident - Hartford		2,717.00	2,717.00	2,900.00	
Workers Compensation -Eastern Alliance		9,754.00	11,638.00	10,500.00	
INSURANCES		33,111.00	37,597.40	35,000.00	0.84%
FACILITIES					
Building Rent		213,664.52	213,664.52	202,728.00	
Building Repairs & Maintenance		5,000.00	5,000.00	5,000.00	
Building Supplies & Materials		2,000.00	2,000.00	2,000.00	
Contracted Custodial Services		27,000.00	27,000.00	27,000.00	
Contracted Landscaping		3,600.00	3,600.00	3,600.00	
Contracted Pest Control		1,200.00	1,200.00	1,200.00	
Custodial Supplies & Materials		10,000.00	10,000.00	10,000.00	
Electricity - New Bern		21,000.00	21,000.00	21,500.00	
Land Lease - New Bern		61,800.00	61,800.00	63,350.00	
Modular Lease		100,000.00	111,908.64	95,705.28	
Parking: Hillsborough St.		0.00	5,400.00	6,500.00	
Security Monitoring		10,000.00	10,000.00	10,000.00	
Telephone		2,000.00	2,000.00	2,000.00	
Water and Sewer		5,000.00	5,000.00	5,000.00	
FACILITIES		462,264.52	479,573.16	455,583.28	10.92%

<h1>Exploris</h1>					
<h2>Draft 19-20 Budget</h2>					
Account		Budget 18-19	EOY Proj 2019.02	Draft 19-20 Budget	% Total
B&A CARE					
B&A Care Supplies - 016		0.00	431.03	500.00	
Salary - B&A Care		38,325.00	38,325.00	41,007.75	
Social Security - B&A Care		1,256.51	1,575.84	3,137.09	
B&A CARE		39,581.51	40,331.87	44,644.84	1.07%
CLUBS					
Clubs Expenses		0.00	5,615.00		
CLUBS		0.00	5,615.00	0.00	0.00%
VARIOUS GRANTS-CASMT					
Salary - Stipend - CASMT		25,000.00	25,000.00		
Social Security Cost - CASMT		1,912.50	1,912.50		
Staff Development - CASMT		13,664.38	13,664.38		
VARIOUS GRANTS-CASMT		40,576.88	40,576.88	0.00	0.00%
Expenses		4,033,055.56	4,255,004.82	4,158,814.17	99.64%
SURPLUS/(DEFICIT)		37,862.13	78,863.12	15,076.31	0.36%

Cover Sheet

Business Plan Presentation

Section: V. Center for Innovation
Item: A. Business Plan Presentation
Purpose: Discuss
Submitted by:
Related Material: Business Plan.final for School Board.pdf



EEx Collaboratory

BUSINESS PLAN - 2019

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1. EXECUTIVE SUMMARY

According to the Brookings Institute, increasingly complex global challenges require schools to rethink education (Winthrop, 2017). Mastery of basic academic skills in math, reading and writing are no longer sufficient to prepare students for the world they are inheriting. Young people increasingly need to be creative problem solvers and critical thinkers. They need to be collaborators who are flexible, adaptable, and who can empathize with others. Most importantly, they need school experiences that help them build these abilities in a culture that is both challenging and supportive.

As schools around the country look for models to learn from, The Exploris School is well-positioned to lead the way. From its inception in 1997, the school has been committed to relevant, inquiry-based learning and global education. The school has grown to become a model of innovative education where teaching and learning extend far beyond the walls of the classroom, and where students grow skills to be creative problem solvers through investigating the world, recognizing perspectives, and taking action as caring citizens.

We are launching a new chapter in the growth of The Exploris School, the EDEX Collaboratory. The EDEX Collaboratory addresses the critical need of transforming teaching and learning to prepare students for a rapidly changing world. The EDEX Collaboratory will empower teachers to change the way students learn by engaging students in solving global problems. Realizing that teaching is often isolating, professional learning through the EDEX Collaboratory will emphasize learning alongside a cohort of educators who collaborate, reflect, and grow together. The EDEX Collaboratory will provide ongoing professional learning and coaching creating a network of innovative-minded educators ready to transform their classrooms and schools.

collaboratory (noun) 1. a center without walls 2. a network of diverse innovators generating solutions

Education + Exploris + Collaboratory
EDucation + **Ex**ploris + **Coll**aboratory
EDEX Collaboratory

A. MISSION

The EDEX Collaboratory is designed to empower innovative educators to stay on the forefront of transformative teaching practices through building an active educator network, leading professional development and coaching, open sharing, and creating cohorts of ongoing peer support. Educators in the EDEX Collaboratory network will empower children to engage in solving problems to improve today's global society.

We believe that...

- Each student deserves an empowering, experiential, and meaningful education.
- Every educator is an agent of change; a designer capable of innovation and teacher-leadership.
- Change in the classroom happens when professional learning is inspiring, collaborative, sustained, intensive, and job-embedded.
- Active learning communities of growth-oriented educational thinkers create-positive and lasting change.
- High quality resources should be open source, freely available and generously shared, to benefit all teachers, schools, and students.
- Teachers are professionals who deserve high-quality learning experiences.

B. BENEFITS

The EDEX Collaboratory will have the following main benefits:

- Extend best practices beyond Exploris, empowering more learners to improve our world
- Collaborate with innovative partners and educators
- Demonstrate best practices
- Develop teacher-leaders
- Keep educators at the forefront of education
- Promote engagement and change in education

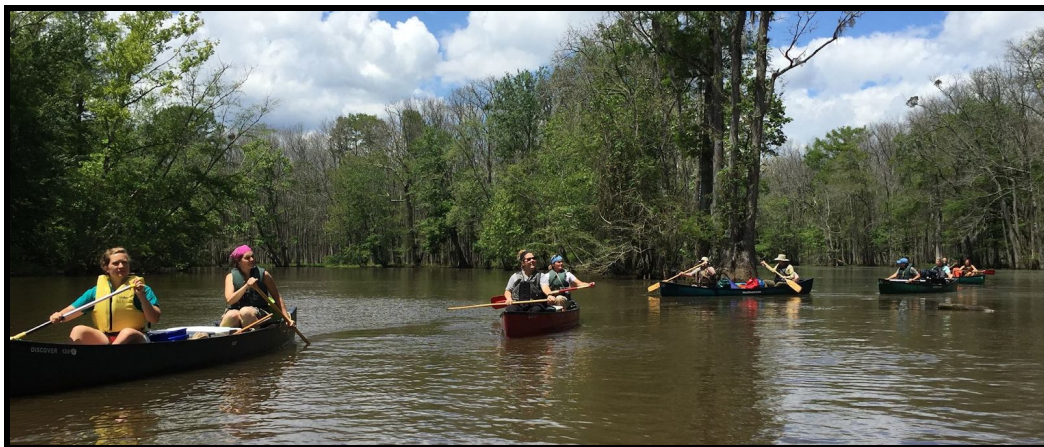


C. COMPETITIVE POSITIONING

A key differentiator of the EDEX Collaboratory, among a competitive market, is that the EDEX Collaboratory will focus on supporting educators beyond the onsite experience. This will be achieved through virtual coaching and a private online group. Studies consistently show that ongoing support in professional development (PD) is the most effective way for educators to learn and grow. Most competitors in the professional development space follow a workshop or conference format with little to no ongoing support. Competitors are discussed in more detail under External Environment and Appendix A.

The EDEX Collaboratory will....

- Build an educator network focused on collaboration and support opportunities
- Have a strong focus on sustained professional learning including ongoing networking and support, as opposed to stand alone, short-term workshops
- Connect participants to the work of current practitioners
- Be moderate in cost for accessibility to more educators
- Provide high-quality content with engaging, hands-on teaching practices
- Provide a great overall experience where educators feel valued
- Support educators with their chosen problem of practice
- Support educators of educationally disadvantaged students



D. GOALS

Within three years the EDEX Collaboratory will provide a life-changing, quality professional learning experiences where teachers are valued, energized, and inspired. This will be accomplished and measured by the following:

- Provide ongoing professional learning and support for over 1500 educators
- Foster a collaborative and active educator community for over 500 educators
- Create and share open-source resources used by over 2,000 educators
- Impact learning opportunities for 30,000 students
- Develop and support over 12 practicing teachers to lead professional learning and coaching

- Foster relationships with partners including external organizations and innovators in education including leading and planning professional learning experiences with at least 6 partner organizations, creating an active educational advisory group, raising over \$500,000, and building an endowment fund
- Launch the ED Ex Collaboratory with a full-time director and hire an additional one and a half full-time employees by the third year. The director will have a deep understanding of global education and The Exploris School as well as business acumen, the ability to create new, quality programs, and collaborate with Exploris teachers
- Communicate the benefits of the EDEX Collaboratory with community stakeholders through the publication of an annual summary and report
- Complete ongoing and thorough evaluation of programming
- Maintain open communication and a symbiotic relationship between the EDEX Collaboratory and The Exploris School

E. FINANCIAL SUMMARY

Unlike schools offering professional development, the EDEX Collaboratory will provide transformative experiential learning for educators. This approach will require the need for external funding to achieve the goals and vision outlined in the EDEX business plan. During the second and third years, funding needs will increase due to the hiring of extra staff to grow outreach and develop new initiatives. If the EDEX Collaboratory is able to secure funding exceeding projected operating expenses, the funds will be used to further reduce costs for educators participating in programming and hire additional staff to increase outreach and offerings. Detailed financial projections and assumptions can be found in Appendix B and linked [HERE](#).

For the 2019-2020 year the the EDEX Collaboratory will hire one full-time position and will offer stipend-based contracts to a small number of interested guest presenters and social media ambassadors.

Financial Overview

	2019-2020	2020-2021	2021-2022
Total Revenue	\$ 21,320	\$ 46,150	\$ 110,155
Total Costs & Expenses	\$ 141,218	\$ 220,727	\$ 284,687
Total Fundraising	\$ 120,000	\$ 175,000	\$ 175,000
Operating Profit	\$ 102	\$ 424	\$ 468
	0%	0%	0%

2. ENVIRONMENTAL SCAN

A. INTRO

There are more schooling options today than ever available to parents: public, private, charter, homeschool, STEM-based, Waldorf, Montessori, religious-oriented, language focused, arts integration to name a few. There are also a myriad of professional development options from online resources to workshops and district-level consulting. The EDEX Collaboratory will address how to most effectively support innovative educators in various settings to help their students thrive in today's world.

B. INTERNAL ENVIRONMENT

Culture/Values

Exploris is a school with a strong collaborative culture that lives its core values daily. Teachers that are a good fit for the project-based learning model are drawn to Exploris due to the autonomy and creativity Exploris allows in teaching that empowers them to have ownership over their job and impact their students and the community. The innovative nature of Exploris teachers and the drive to make meaningful change in the world is ingrained in the culture of the school. Also embedded in the culture is having the courage to experiment and take on risks and challenges.

There have been a lot of changes going on at Exploris recently including: plans for a new building, switching from multi-grade to single grade and the move to co-teaching in all grades K-8. Even with the myriad of change, Exploris teachers and staff are accustomed to and thrive in a fast-paced environment that allows them to adapt and grow.

Credibility and Notoriety

Exploris has received many accolades between the school's accomplishments, teacher awards and student achievements. In 2014, The Exploris School earned the designation of the first model STEM school in the state of North Carolina by the NC State Board of Education and the U.S. Department of Education Green Ribbon Award. On staff the school has 2 Burroughs Wellcome Fund Career Awards for Science and Mathematics Teachers, 2 Presidential Awards for Excellence in Mathematics and Science Teaching, 3 Kenan Fellows, and 5 Educators of Excellence, to name a few. The school's commitment to project-based learning and getting students outside the classroom to solve global problems can be seen in projects such as Drum Majors for Justice, The Food Heros, Trash Talking 101, and numerous Walnut Creek Wetland Park projects.

Charter Responsibilities

By increasing collaboration with educators in local school districts and beyond, Exploris can openly share its instructional strategies in a meaningful, pragmatic and supportive way that will complement the teachings of other schools, regardless of school structure.

As a public NC charter school, The Exploris School is intended to encourage progressive teaching methods and share best practices with other schools. Exploris's commitment to sharing its findings and philosophy is also part of its vision: "Empowering learners to improve our world." The school's commitment to sharing is also demonstrated through free tours and school visits. Annually hundreds of educators and administrators from across the state, country, and internationally come to The Exploris School to observe its teaching practices.



C. EXTERNAL ENVIRONMENT

A report titled "*Bridging the Gap: Paving the Pathway from Current Practice to Exemplary Professional Learning*" collected data about professional development offerings from over 200 school districts and it emphasizes that only "20% of professional learning opportunities offered today meet with the new federal criteria for quality" (Combs, 2016). New federal guidelines define quality professional learning as meeting six criteria: sustained, intensive, collaborative, job-embedded, data-driven, and classroom-focused.

The EDEX Collaboratory will differentiate itself from the highly competitive marketplace by offering cohort programs with teacher support and networking that meet federal guidelines. Studies suggest that "the traditional workshop form of professional development struggles to produce meaningful change in teacher practice because workshops are often too general in content or do not offer active learning opportunities" (Quintero, 2019).

Bridging the Gap

BY THE NUMBERS

Sustained \sə-'stænd\ adjective;
 taking place over an extended period;
 longer than one day or a one-time workshop.

KEY METRIC:
 Activity enrollments consisting of more than three meetings

finding:
13%

Intensive \in-'ten(t)-siv\ adjective;
 focused on a discrete concept, practice or program.

KEY METRIC:
 Average length of PD activities (in hours)

finding: 4.5 hours

Job-embedded \'jəb, im-'be-dəd\ adjective;
 a part of the on-going, regular work of instruction and related to teaching and learning taking place in real time in the teaching and learning environment.

KEY METRIC:
 Activities offered within the school system

finding: 63%

Collaborative \kə-'lə-bə-,rätiv\ adjective;
 involving multiple educators, educators and coaches, or set of participants grappling with the same concept or practice and in which participants work together to achieve shared understanding.

KEY METRIC:
 Enrollment in an activity with a collaborative format

finding: 9%

Data-driven \'dei.tə,driv-'n\ adjective;
 based upon and responsive to real time information about the needs of participants and their students.

KEY METRIC:
 Activities offered aligned to a data-driven format

finding:
8%

Classroom-focused: \'klas,ru:m, 'fəukəst\ adjective;
 related to the practices taking place during the teaching process and relevant to instructional process.

KEY METRIC:
 Activities aligned with classroom-focused InTASC standards.

finding: 85%

<https://www.frontlineinstitute.com/reports/essa-report/>

When considering professional development programs and organizations that are trying to create change in the culture and method of education, there are four main groups to consider:

- 1) For-profit and nonprofit organizations impacting education on a larger/district level scale
- 2) Online resources
- 3) Schools leading professional development/tours
- 4) Districts and state agencies

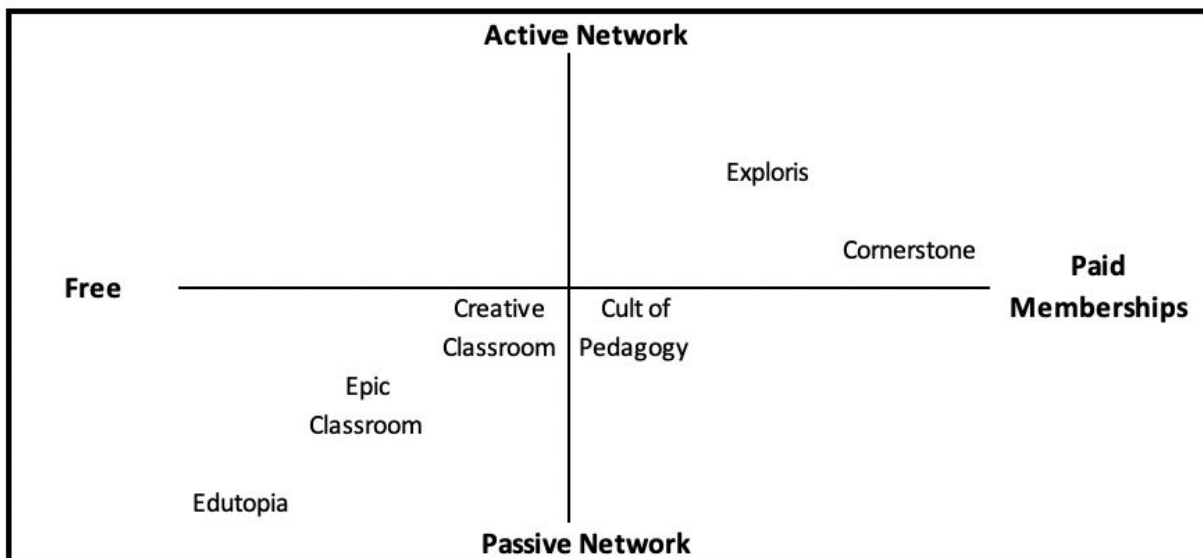
1) For-profit and nonprofit organizations

The independent for profit and nonprofit institutes tend to focus on change at a higher level and their target market includes whole schools or districts. Although consultants sometimes work with individual teachers, they are hired by the school or district to prioritize goals and develop school wide and/or district wide strategies. Also, these services are not targeted towards individual teachers and are typically more expensive than our target customer can afford.

2) Online resources

There are numerous online resources teachers turn to for professional development or classroom/curriculum resources. While some of these are high quality and have benefits such as being free or low cost and learning from the convenience of your home, some have major drawbacks such as inconsistent quality, lack of depth, no accountability of implementation or peer support. The gap analysis chart below analyzes five influential educator bloggers/podcasters with large followings and high quality content. The chart also shows where Exploris’s EDEX Collaboratory will fall within the current landscape. A more detailed analysis of each blogger/podcaster is included in Appendix A.

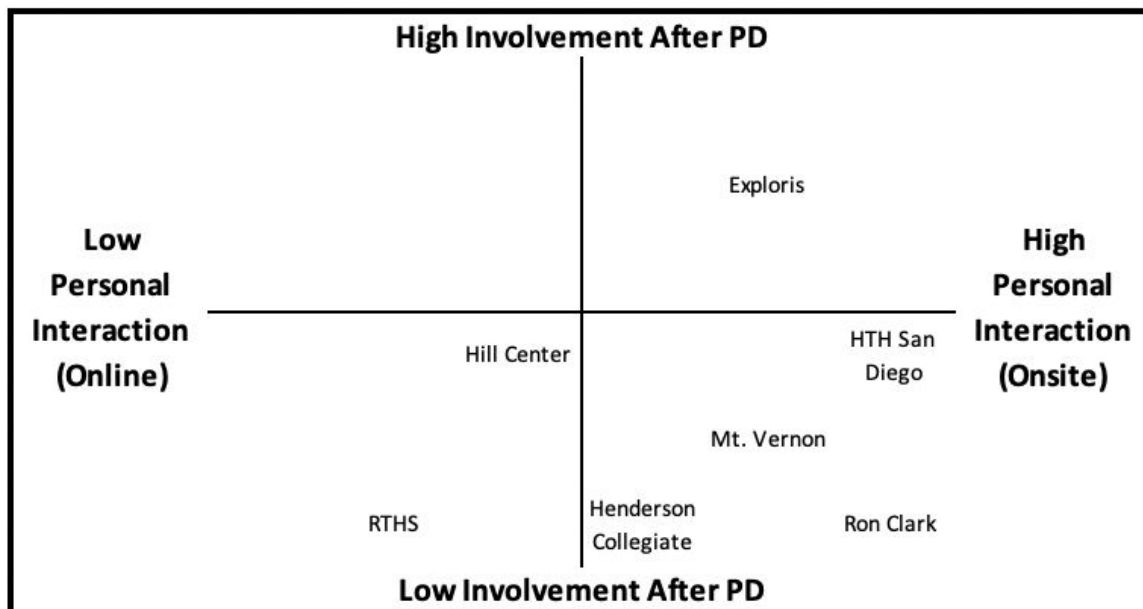
Gap Analysis



3) Schools leading professional development/tours

While there are many schools across the country offering professional development programs for K-12 teachers, they vary in degrees of cost, content quality, and overall experience provided. The gap analysis chart below analyzes six professional learning programs/organizations partnered with a school. The chart also shows where Exploris’s EDEX Collaboratory will fall within the current landscape. The schools and their corresponding programs were selected because they represent various geographic locations, school types (private and charter) and methods of teaching (online courses, in-person workshops, customized programs, etc.) All receive outside funding in the forms of grants and/or corporate sponsors. A more detailed analysis of each school is included in Appendix A.

Gap Analysis



4) Districts and State Agencies

School districts and a state’s department of public instruction will organize, lead, and offer professional development for their systems’ teachers. Typically large districts have an entire department of coaches and consultants who are full-time employees and lead professional development at no cost to the school or teacher. In larger districts professional development is often mandated/required to address goals within a strategic plan. When in-house coaches and consultants do not have enough bandwidth or expertise, districts and states may outsource professional development to other for profit and nonprofit institutions.

D. SWOT ANALYSIS

This section provides an overview of the Strength, Weaknesses, Opportunities and Threats associated with the EDEX Collaboratory and The Exploris School.

Strengths

- Twenty year track record of implementing innovative educational practices
- History of strong student outcomes
- Recognition for quality educational offerings as the NC's first Model STEM School and a national Green Ribbon School
- Commitment to making the local community stronger through student engagement and service-learning
- Agile and reflective school environment
- Culture that encourages prototyping new ideas
- High caliber teachers
- Exploris teachers are regarded as leaders and innovators
- Faculty interest and support in expanding professional development offerings

Weaknesses

- Short time-frame to execute and secure funding may provide cash flow difficulties in Yr 1
- Lack of diversity in student body may make it more difficult to win grants (Equity and Diversity Committee's plan and weighted lottery will help but may take a few years)
- Labor and commitment involved in starting the EDEX Collaboratory during an already busy time at Exploris
- Lack of designated on-site space for an elevated experience until we move into the new building
- Current goals for the work are large, job may be too big for one person
- Potential challenges when finding the right balance between increasing classroom observations, access to teachers, and access to ambassadors without impacting instruction

Opportunities

- Popularity of project-based learning, experiential learning and other methodologies used by Exploris are on the rise
- Addressing relevant topics in education as opposed to specializing in just one area (such as Mount Vernon Institute For Innovation focusing on Design Thinking) keeps programming from "fads" or having to re-invent itself
- Messaging that the curriculum will be actionable in various educational settings
- Developing Study Visits that are informative and useful
- Developing meaningful partnerships with innovative educational thinkers in the state and nation
- Shifting possible negative perceptions of charter schools by making a positive impact on the community.
- Supporting innovative teachers who are looking to challenge the status quo
- Developing and sustaining cohorts of educators who support one another to strengthen teaching practices

- Organizing a small group of teachers to serve as teacher-leaders to work with the Director and help drive direction of the EDEX Collaboratory

Threats

- Need for and reliance on substantial outside funding from outside sources (grants, corporate sponsors, donations)
- Financially sustainable professional learning experiences are expensive for schools and teachers
- Tight profit margins, especially without supplemental funding
- School funding for professional development is low
- Competition both in North Carolina and across the country
- Teachers from traditional public schools may have the perception that Exploris can do things as a charter school that they can't implement at their school
- Potential negative and/or political perception of charter schools among stakeholders (donors, grantors, educators, etc.)

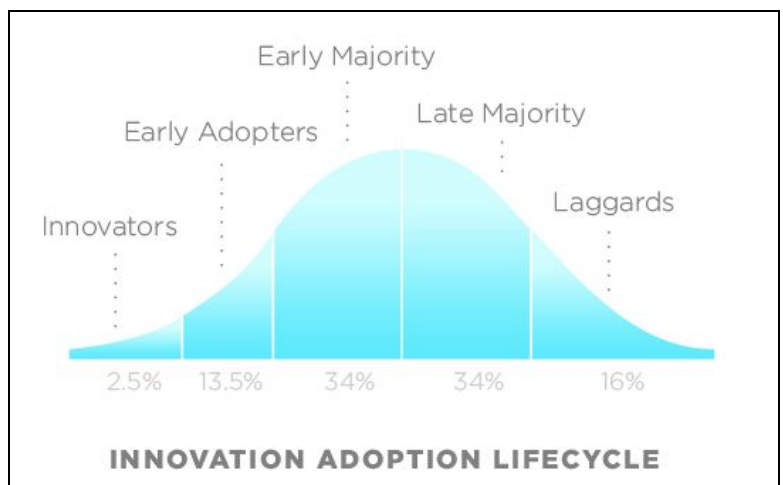
3. MARKETING

A. TARGET MARKET

In 2019-2020, we will reach educators in North Carolina, including an emphasis building relationships with educators working directly with educationally disadvantaged students. The key target market for the EDEX Collaboratory includes innovative educators, Restart schools, and school leaders.

Customer Persona: Innovators

Our ideal target customers are K-12 educators and the leaders who support them. They are innovative educators who are early adopters and the early majority on the Innovation Adoption Life Cycle. They want to gain support from a network of like-minded teachers and hone their craft to provide the best learning experiences for their students. There will be teachers who are satisfied with the status quo and are not compelled to grow and innovate – these are not our customers. Although they may attend a workshop or conference they will not be motivated to engage in the ongoing professional networking and learning.



https://en.wikipedia.org/wiki/Technology_adoption_life_cycle

Research shows that increased teacher autonomy leads to a greater sense of empowerment and professionalism and teachers are less likely to be satisfied with their jobs when they don't have the freedom to make their own lesson plans (Tampio, 2019). The EDEX Collaboratory will support innovative teachers in becoming more autonomous in the classroom and the satisfaction of being a professional who has control over their career.

Characteristics of our Customer	Challenges of our Customer
Innovative collaborators - thought leaders who think outside the box, question the status quo, and desire to grow alongside others	Frustrated - when innovators cannot make change they can become frustrated
Growth motivated - they naturally feel the need to grow and challenge themselves	Exhausted and have limited time (long hours of teaching)
Desire to feel valued - they want to better the world	Possible low morale from feeling undervalued
Status in knowledge - early adopters who want to share with their friends and colleagues	Limited budget - their pay does not reflect their effort, level of schooling, or importance of position
Believes all students can learn and grow and are highly motivated to help students succeed	Has many students with high needs but lacks resources, support, and time for each student

Restart Schools

Another target market for the EDEX Collaboratory to consider is Restart Schools, low-performing schools that are given new opportunities to turn themselves around - some given "charter-like" flexibilities to make change. Cost will be a consideration with Restart Schools as many are in low socioeconomic neighborhoods and they are not given additional funding for professional development - rather, they are given more flexibility in how they use the funding they already have. Grants and other sources to subsidize funding should be considered. However, many Restart Schools are also Title I schools. Title I schools do receive additional funding that can be used for professional development.

Over 100 NC public schools are participating in the state's Restart program. The Innovation Project (TIP) is focusing one of their main initiatives on supporting restart schools by helping them redesign learning environments, providing coaching and facilitating opportunities for participants to network. A possible opportunity for the EDEX Collaboratory is partnering with TIP on their visits to innovative North Carolina district and charter schools. The purpose of these visits is to support schools in TIP districts that are in the redesign process by providing examples of schools using charter and charter-like flexibilities to reshape their approaches to teaching and learning.

School Leaders

It will be important to remember that the EDEX Collaboratory appeal to school leaders as well. Systemic change will happen only when school decision makers and teachers are united. Also, school leaders such as curriculum coaches, science specialists, etc. typically attend professional development and share with staff upon return. Additionally, school leaders approve school-level professional development spending and have the discretion to support professional development opportunities for staff.

B. MARKET ANALYSIS

According to 2017-2018 employment data released by the NC Department of Public Instruction there are over 83,000 teachers within a 3 hour drive of Exploris's campuses in downtown Raleigh. Additionally, there are an estimated 2,000 plus public charter school teachers. If 13.5% of these 85,000 educators are early adopters, our in-state target market includes approximately 11,500 teachers. Even if one percent of this number participates in paid professional development through EDEX Collaboratory there would be over one hundred educators participating.

In general, professional development funding typically comes from the following three sources:

- The school pays
- The teacher pays out of pocket
- Scholarships, donations, and/or grant funding

Often funding comes from a combination of the above. For example, a teacher may pay out of pocket for all travel expenses, receive a scholarship or grant to attend, and the school may pay sub fees. It is important to know that teachers will and often do pay out of pocket for professional development. Teachers are responsible for attending professional learning opportunities as they work on accruing Continuing Education Units (CEUs) for license renewal.

In 2008, state funding for professional development dropped from \$12.8 million dollars to \$0 and has remained a \$0 dollar line item ever since. Although, Governor Cooper's most recent budget proposal restores professional development funds by including \$5.3 million for more professional development opportunities, it is not a guarantee that his budget spending plan will pass.

To fill the funding gap left by removal of state money, schools have shifted funds for professional development from other budget areas. Also, opportunities for professional development grants have increased including the new Governor's Educator Discovery Award Application which will award up to twelve \$1,000 professional development scholarships per year. Other grants can be found through state and local organizations, a school's PTO/PTA organization, and by posting professional development opportunities on the popular philanthropic education site Donors Choose.

It will be helpful for the EDEX Collaboratory to stay abreast of possible funding sources and to connect educators to potential funds for professional development.

C. PROGRAM OFFERINGS

Education Service Offerings: 2019-2020

The following offerings are suggested for 2019-2020 school year with a full-time director position. The EDEX Collaboratory will start by offering programs in high demand, generate revenue, and play to our strengths. These core offerings will be further developed in future years.

Program	Description	Cost
School Tours	<ul style="list-style-type: none"> 8 tours per year - 4 per campus 2 hours per tour 30 people per tour Private tours can be arranged for a fee 	\$0 \$250 per private tour
School Visits	<ul style="list-style-type: none"> 2 visits days per year - 1 on each campus 5 - 6 hours (9:15 - 2:45) 30 ppl/visit (2 leaders if >20 ppl) Overview of school and seeing core Exploris teaching practices in action 	\$150 per person, or \$125 (if registering with a group of 4 or more)
Study Visits	<ul style="list-style-type: none"> 4 offered per year - campus TBD 2-3 consecutive days per Study Visit Focused on a deeper dive into a specific topic (possible examples: PBL, Standards-based grading/Assessment/Portfolio, Change Management for Schools, Citizen Science, STEM, Global Education, Service-learning, etc) Networking opportunities 20 ppl/visit (2 leaders if >15 ppl) <p>After the face-to-face experience:</p> <ul style="list-style-type: none"> Virtual follow-up and/or coaching (see Ongoing Support below) Invitation to online community Invitation to network meet-up 	Approx \$775 per person
Guest Expert PD	<ul style="list-style-type: none"> Multiple potential offerings (Cohort, multi-day, one-day, etc.) Topics based on faculty interests and specialty areas Guest presenter(s) submits an application Possible topics: Citizen Science, Big History, Mindfulness, and more... 	TBD

<p>Inspiration Project</p>	<ul style="list-style-type: none"> ● Custom PD for schools to support work on a problem of practice ● 10-12 hours of face-to-face PD over two non-consecutive days ● Virtual follow-up and/or coaching (see Ongoing Support below) ● 1 per year, or as requested ● 35 person max (2 facilitators) 	<p>Approx. \$800 per person or \$10,500 + travel per school</p>
<p>Ongoing Support (“Office hours”)</p>	<ul style="list-style-type: none"> ● Host a variety of virtual one:one follow-up and group follow-ups via video conferencing ● 3.5 hours of follow-up coaching offered to any participant who is in the network, (Network participants are those who attend a Study Visit or other time intensive PD experience). ● Within the same year of attending EDEX Collaboratory PD, network members may sign up for: <ul style="list-style-type: none"> ○ Up to 3 one-hour small group coaching sessions ○ Up to 1 thirty minute 1:1 coaching session ● “Office Hours” includes three hours of virtual facilitated coaching time each week <ul style="list-style-type: none"> ○ Small group coaching: Network participants sign up online and connect virtually for coached facilitation addressing a problem of practice, up to 5 participants per session ○ 1:1 coaching: Network participants may sign up online for 30 minute 1:1 coaching offered for one hour per week ● Additionally, lead and participate in Twitter chats and the private network Facebook group 	<p>Included in the price of Study Visits and Inspiration Project</p>
<p>Annual Network Meetup</p>	<ul style="list-style-type: none"> ● Network benefit ● Gathering and celebration for educators, guests, and leaders who participated in PD ● Student work showcase ● Keynote speaker 	<p>\$30 per person</p>
<p>In-network visits</p>	<ul style="list-style-type: none"> ● Free tours for international guests will continue to be scheduled as requested. ● Educators serving as part of the EDEX Collaboratory Advisory Group receive a credit towards PD 	<p>N/A</p>

Educational Service Offerings: 2020-2021

In 2020-2021 the EDEX Collaboratory will continue to offer the core programs and begin offering professional learning opportunities that expand the work and increase the scale. A primary goal will be to secure external funding in order to reduce costs for teachers and to allow EDEX Collaboratory to share resources openly and generously. Potential future offerings include further developing the “freemium” business model. This would include free blog and podcast offerings that encourage enrollment in a network with blended 6-8 week paid online courses. Additionally, we plan to increase the network through access to regularly created and curated content including blogs and podcasts. Creating online content will be introduced gradually to ensure consistent high quality that exceeds customer expectations. High quality content is critical to attracting and retaining customers and positioning our brand. These new online offerings will require an investment of research, creativity, tech development, and resources. Also, the capstone celebratory Network Meetup event will transition into a 1-day conference in 2022 and showcase, further enhancing the value EdEx Collaboratory provides.

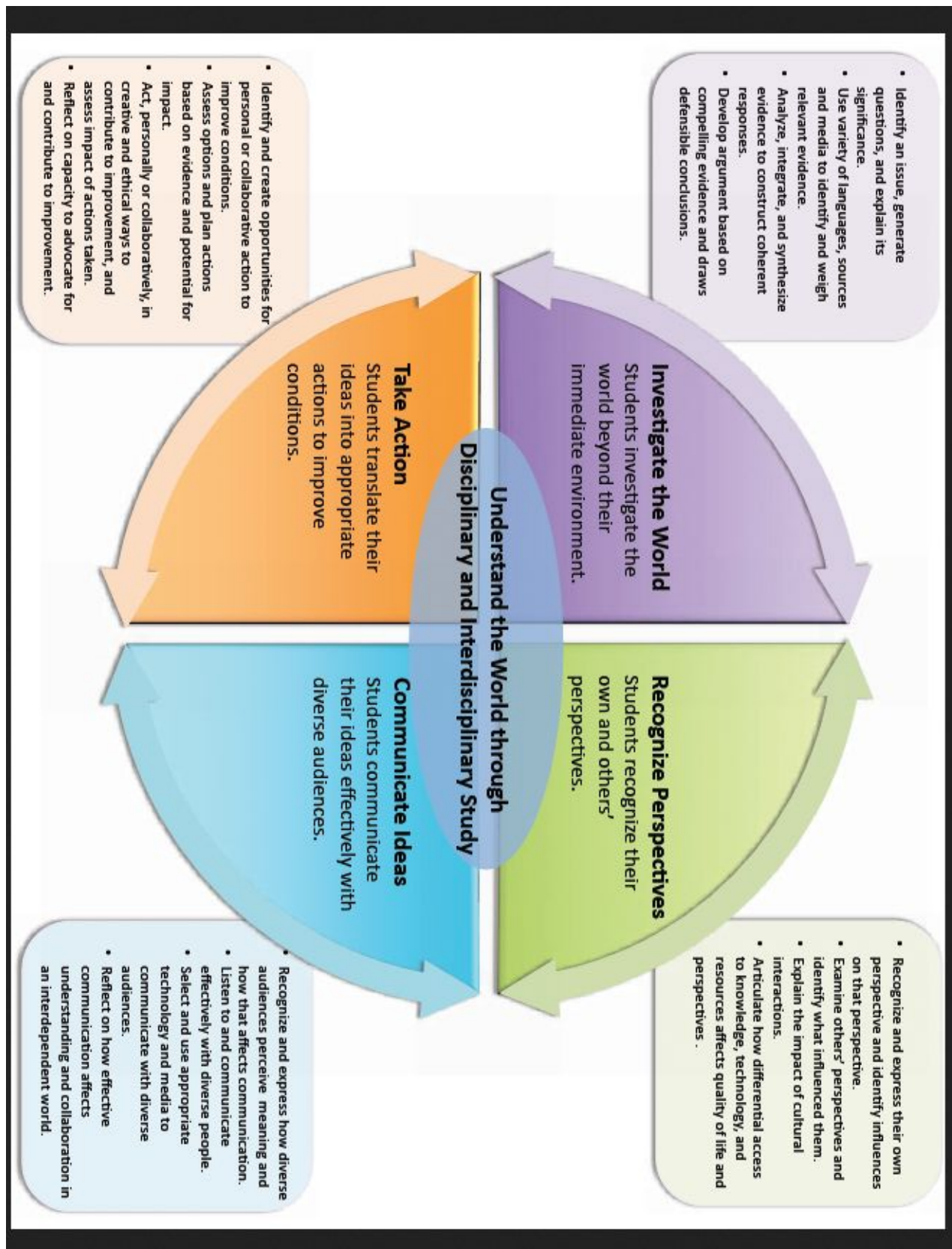
Potential new revenue streams may include:

- Amazon Services LLC Associates Program: Posting an “On Our Shelf” webpage with direct links to purchase titles through Amazon. As part of the Amazon Services LLC Associates Program, an affiliate advertising program, EDEX Collaboratory earns 5-7% of purchase amounts when readers purchase items linked from our website to Amazon.com and affiliated sites.
- Podcast sponsorships: Each free podcast will have one or two 45-second sponsorships carefully selected from companies and organizations that align with the mission and vision of EDEX Collaboratory. Each sponsorship will be read by the podcaster at the start of an episode.
- Teachers Pay Teachers: Creating complementary digital products and listing them for free or for sale under Teachers Pay Teachers.
- Online courses: Creating 6-8 week online courses
- Subscription services: Digital and/or physical content delivered at regular intervals to paid subscribers

Subject Areas for Professional Development

Professional development offerings will not be limited to specific subject areas as the EDEX Collaboratory will evolve and feature in-demand relevant programs. Subjects for professional development will align with the values of Exploris since the EDEX Collaboratory and The Exploris School essentially share a brand and one entity can influence external perception of the other. This includes topics emphasizing global education which has been central to the work of The Exploris School since its inception in 1997.

Core Competencies of Global Education



<https://asiasociety.org/files/book-globalcompetence.pdf>

With global education at the core of its model, The Exploris School is also equipped to provide expert guidance and support in:

- Project-based Learning (PBL)
- STEM
- Service-learning
- Design Thinking
- Standards-based grading and the assessment/reflection cycle (including student-led portfolio conferences)
- Social-emotional learning
- Co-teaching
- Interdisciplinary Curriculum Design
- Citizen Science
- Big History

EDEX Collaboratory will also serve as an incubator and testing ground for new teachings at the School. Additionally, school-level innovations will lead to new EDEX Collaboratory program offerings. This collaborative relationship will continue to keep Exploris at the forefront of education, benefitting not only Exploris students and teachers but those in the community and larger population as well.

Method of Teaching

The EDEX Collaboratory will use a hands-on experiential approach, as opposed to lecturing or slideshows, as that is the Exploris way of teaching and will be more engaging for the audience. With hands-on learning experiences, the audience will be better equipped to take what they learned and implement the findings into their classroom. Study Visits will be delivered in a way that the teachings are actionable and pragmatic, providing real-world value to the participants. Additionally, time will be spent in classrooms followed by debriefing observations as well as opportunities to speak directly with teachers and staff. Access to current practitioners gives the EDEX Collaboratory a unique advantage over external educational consultants who are out of the classroom environment and hired to lead professional development.

Online Supplemental Support

The EDEX Collaboratory will also offer online supplemental coaching for network members to support implementation and achieve goals, and develop a cohort model where the educator feels part of a supportive group. "When implementing an educational approach, providing ongoing support to teachers through coaching, workshops, and supervision has been shown to have a substantial impact on student outcomes... Professional learning communities are an important part of teachers' continuous development..." (Vaughan and Albers 2017).

As teachers (especially innovative teachers) can often feel isolated and exhausted, providing additional support and contact beyond the in-person learning is paramount to the experience of The EDEX Collaboratory. "Decades of low pay and overcrowded classrooms have affected teacher health and job satisfaction: A new study found that 93 percent of elementary school teachers experience high levels of stress. Beyond long hours and heavy

workload, teachers report feeling “emotional exhaustion” (Terada, 2018). The online supplemental coaching is an important part of developing the network to maximize teacher growth and satisfaction.

Benefits of an Online Community

- Drastically lowers barriers to teachers participating in professional development (cost, time off school, sub fees, travel, etc)
- Provide convenience and flexibility to not have to commit to a specific event date
- Eliminates the burden/cost of taking Exploris teachers out of the classroom
- Allows the impact of the event to go beyond the workshop which is necessary for lasting effectiveness
- The combination of on-site followed by online interaction allows personal relationships to grow, as opposed to solely online communities with no face-to-face
- Strengthens the network of EDEX Collaboratory participants

Execution of Online Support

The key to executing ongoing learning support will be providing value for the customer while making sure it isn't overly burdensome or time-consuming for EDEX Collaboratory staff, including paid Exploris teachers, to be involved. In addition to being active on social media, online support will include a variety of virtual one-on-one follow-up and group follow-ups via video conferencing. Three and a half hours of follow-up coaching will be offered to any participant who is in the network. Within the same year of attending EDEX Collaboratory professional development, network members may sign up for:

- Up to 3 one-hour small group coaching sessions
- Up to 1 thirty minute 1:1 coaching session

D. BRAND

The EDEX Collaboratory will maintain a symbiotic relationship with The Exploris School. The name, look and feel of the EDEX Collaboratory should be tied to The Exploris School so that it is clear these organizations are affiliated.

Some reasons for this are:

- Transparency for funding
- Transparency that the EDEX Collaboratory is governed by and founded by Exploris members
- Exploris already has strong name recognition and brand value
- Exploris has a positive reputation and notoriety in the community for being at the forefront of education

E. PROMOTIONAL STRATEGIES

As consumers move away from paying attention to outbound marketing tactics, including paid ads or any messages that interrupt or are not opt-in, the EDEX Collaboratory should use a more grassroots, organic strategy to spread the word.

Strategies	Description	Cost
Blog	<ul style="list-style-type: none"> ● Draws educators in with relevant, curated and engaging information ● Gives a glimpse into what Exploris is about and entices audience to attend a paid program ● Highlights Exploris Expeditions and student experiences 	Labor costs
Search Engine Optimization	<ul style="list-style-type: none"> ● Make sure the site is optimized so the right people can find us 	Labor costs
Public Relations	<ul style="list-style-type: none"> ● Personalized outreach to targeted media outlets and educational listservs ● Piggy-back on breaking ground of new building ● Determine multiple angles of stories for various outlets ● Press releases 	Labor costs
Social media	<ul style="list-style-type: none"> ● Lead and participate in social media discussions on Facebook and Twitter ● Garner attention, gain new followers (potential customers) and increase credibility as influencers in education 	Labor costs
Newsletter banner	<ul style="list-style-type: none"> ● Place ads/space in newsletter read by our target audience 	Need to get pricing
Email Marketing	<ul style="list-style-type: none"> ● Create homegrown list of attendees of free tours, email sign-ups on website ● Offer promotions to share with friend/colleague 	Potential small subscription fee for email marketing system
Exhibit or sponsor conferences/local forums	<ul style="list-style-type: none"> ● Attend and present at conferences ● Encourage other Exploris educators to present at conferences ● Share upcoming PD opportunities during conference presentations 	Cost of conference registration fees and travel

Partnerships	<ul style="list-style-type: none"> • Organically spread the word to new audiences that fit our target market • Boost credibility by collaborating with other high caliber organizations • Do joint PR articles and have partners link to our website for increased visibility and to help with SEO 	Labor costs
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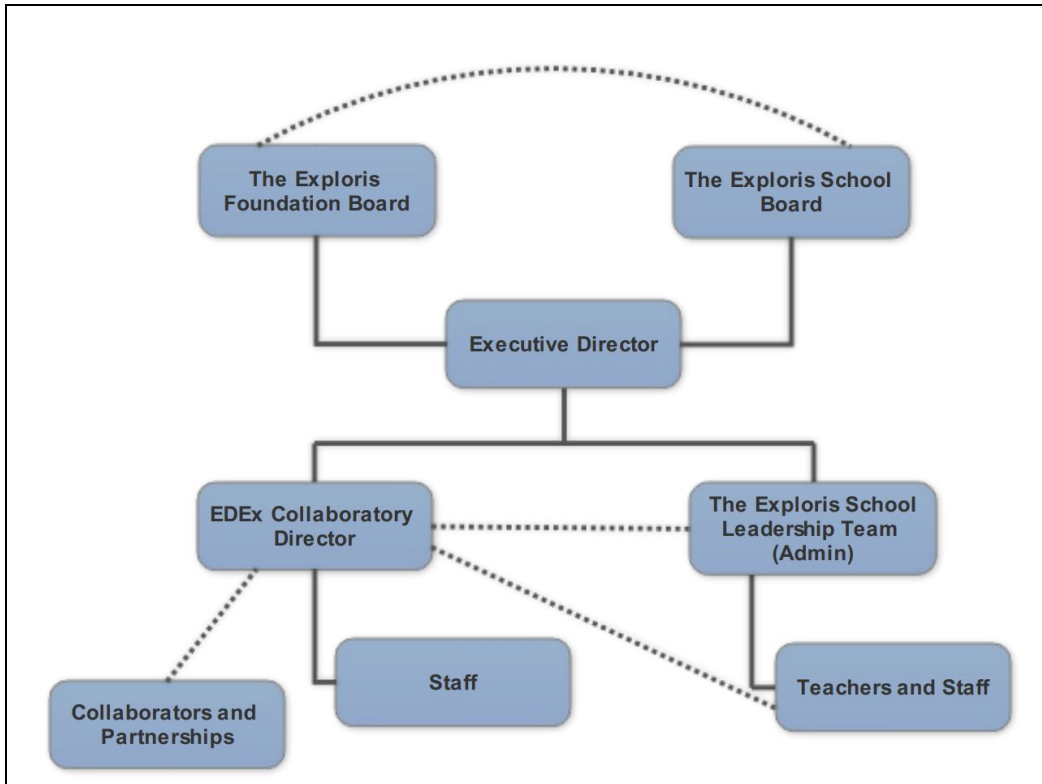
4. STAKEHOLDERS

A. THE TEAM

There will be a combination of employee(s) working for the EDEX Collaboratory including a director and additional EDEX Collaboratory staff in Year 2. Additionally, guest instructors will lead professional learning and play an active role as part of the paid EDEX Collaboratory team.

Organizational Structure

The EDEX Collaboratory director would report to the executive director of The Exploris School to ensure alignment of mission and vision between the two organizations.



Director of the EDEX Collaboratory

Beginning in 2019-2020 the EDEX Collaboratory will need the minimum equivalent of 1 full-time employee. This could be a full-time director who drives all program offerings, manages the relationship with Exploris administration and teachers, external stakeholders, funding/grant writing, and is responsible for profits/losses. The ambitious nature of the project would benefit from more than one salaried employee, however, the reality of funding makes it most likely that the EDEX Collaboratory director will be the only salaried employee during the upcoming school year.

Consider structuring this/these roles as salaried positions using a billable hours model with the expectation that one full-time employee would bill 38 hours per week (not counting lunch, breaks, etc). A billable hours model will help track both funding and time. Tracking billable hours will make grant monitoring and reporting easier and more accurate, especially when managing funding from a variety of sources. Also, due to the need to actively secure funding, manage marketing and operations, and create and deliver programming, billable hours will provide helpful data for tracking progress and deliverables as well as help the employee(s) strive for work-life balance.

Full-time Director Responsibilities	Estimated Percentage of Time
<p>Development:</p> <ul style="list-style-type: none"> ● Securing funding (grant writing, meeting with potential sponsors/donors) ● Marketing (including blogging, social media, email marketing, speaking opportunities, etc.) ● Developing partnerships with influencers and like-minded organizations 	30%
<p>Admin:</p> <ul style="list-style-type: none"> ● Fiscal responsibilities (budgeting, profit/loss, billing, grant reporting) ● Payroll ● Oversight of contracted Exploris teachers ● Managing event sign ups, communication with attendees, payments ● School related meetings, duties, and/or coverage ● Serve on the Exploris Foundation Board 	30%
<p>Professional Development:</p> <ul style="list-style-type: none"> ● Creating, planning, prepping, and leading professional development ● Leading on-going support and hosting office hours and virtual follow up ● Coordinating spaces and vendors for PD ● Training and co-developing PD with guest presenters and sub-contractors 	40%

- | | |
|---|--|
| <ul style="list-style-type: none"> Organize and lead the EDEX Collaboratory Advisory Group | |
|---|--|

Guest Instructors

Guest instructors will submit an application and detailed proposal for the professional development they would like to offer. Applications will be accepted on a rolling basis. Guest instructors will be offered a contract for supplemental pay and hired at one of two levels: collaborator and leader. Contracts will outline an add-on job title and stipend/other perks for their efforts taking place outside of the normal work day. The payments will be stipend-based instead of billable hours and will be set according to level (collaborator, leader) and approximate hours leading professional development. Also, built into each accepted application will be time that the director spends preparing and coaching guest instructors to guarantee that teaching styles and philosophies are aligned with EDEX Collaboratory vision and standard of quality programming. Contracts will be paid in installments. Additionally, guest instructors will receive a title and be featured on the EDEX Collaboratory webpage. Care will be taken to ensure that involvement of any classroom teachers will not detract from their instructional time with students.

Social Media Ambassadors

As the network grows, there will be a need for social media ambassadors to help with replying to comments on social media accounts, organizing and running Twitter chats, and being active participants in the private Facebook group. Ambassadors must have a strong educational background and align with EDEX Collaboratory mission and vision. Interested ambassadors will submit an application and applications will be accepted on a rolling basis. Ambassadors will be offered a contract for supplemental pay. Contracts will outline an add-on job title and stipend/other perks for their efforts outside of their normal work hours. The payments will be stipend-based instead of billable hours.

2020 and Beyond

Expansion plans starting in 2020-2021 will require additional staff to grow and expand to produce the ambitious work outlined in the business plan. Again, a combination of fulltime and part time roles may fulfill these duties. Additional options may include offering paid internships that target local college students and/or recent graduates.

Time Allocation for Program Planning

It is important to understand that leading quality professional development takes many hours of preparation and follow-up, especially when the offering is new. To help with budgeting for program development and service delivery, the following formulas are suggested:

Type of Professional Development	Time Allocation (ratio)
<ul style="list-style-type: none"> Coaching (Face-to-face or virtual) 	2 hours of prep/follow-up: 1 hour of delivery
<ul style="list-style-type: none"> NEW or Custom professional learning 	4 hours prep/follow-up: 1 hour of delivery
<ul style="list-style-type: none"> Professional learning (repeated/not new) 	2.5 hours prep/follow-up: 1 hour of delivery

Although some tasks will get faster and more automated over time, shortcuts can't be made for many of the tasks necessary to lead professional learning. The employees of the EDEX Collaboratory will need to strive for efficiency, yet be realistic about the time it takes to prepare high quality professional learning experiences that motivates our customers to thrive.

School Staff

The EDEX Collaboratory will be a schoolwide endeavour. The EDEX Collaboratory will highlight the incredible work of the Exploris staff including celebrating the growth mindset and problem solving skills embraced on campus. There will be guests touring through rooms, staff may be asked to meet with attendees during planning, or as part of a teacher panel. Also, teachers and staff will be invited to networking events and attendees will be eager to hear staff perspectives. It will be important to maintain open communication and a symbiotic relationship between the EDEX Collaboratory and The Exploris School. Teachers at Exploris are regarded as leaders and innovators in their field and there is room for everyone at the table.

B. ADVISORY GROUP

There will be an EDEX Collaboratory Advisory Group. We will seek out our state's futurist thinkers and educational innovators to meet regularly and brainstorm action items for the EDEX Collaboratory and beyond. Interested participants will apply and applicants will be considered twice per year. Individuals serve a two-year commitment, but may apply to remain part of the educator advisory group beyond the initial two years. This group will be our core influencers including community, business, and education leaders. Influencers are important to any new organization looking to garner attention and engage a new audience. They offer credibility and the catalytic energy to make a change in an industry. Our advisory group members will not be paid. However, educators serving as part of the EDEX Collaboratory Advisory Group will receive a credit to attend EDEX Collaboratory PD.

C. POTENTIAL PARTNERSHIPS

The Exploris School way is to develop meaningful partnerships as a project begins. The EDEX Collaboratory is in its early planning stages and partnerships have not yet been actively

pursued. However, it will remain an important goal to strengthen partnerships and collaborate with other leaders in education. We suggest the EDEX Collaboratory staff start by joining and/or actively participating in the [Triangle Learning Network](#) and the [Go Open NC](#) campaign.

Additionally, leadership should consider exploring new partnerships with the following organizations: The Big History Project, The Innovation Project (TIP), North Carolina Colleges of Education, Natural Learning Initiative, NCCAT, Leadership + Design, and EDNC.

The following are current professional learning partnerships that exist either through the school or through key influencers on staff.

Partnerships	Benefit
<p>NC Museum of Natural Sciences (NCMNS) & PBL Fellows</p>	<p>A Memorandum of Understanding exists between Exploris and the NCMNS establishing the two institutions as partners (2008).</p> <p>PBL Fellows is an established professional learning program currently in its third year and housed at the NCMNS led in partnership with Exploris teachers. PBL Fellows models the type of effective PD the EDEX Collaboratory will offer.</p> <p>The NCMNS is an established institution and the education staff is open to partnering in any capacity that supports the mission and vision of both institutions.</p>
<p>Design for Change (DFC)</p>	<p>Exploris has formally participated in Design for Change projects since 2015. Exploris students have earned top honors in the nation for three years in a row and were selected to attend the international DFC conference in 2016. There is a strong connection between DFC and the values and work of The Exploris School.</p> <p>Currently, Exploris staff are leading a DFC cohort in its first year. This cohort is a hybrid virtual and in-person model.</p> <p>Two Exploris staff currently hold the title of North Carolina's Champions for Change.</p> <p>Design for Change is looking to expand its</p>

	reach in the United States.
Citizen Science and North Carolina State University (NCSU)	<p>Exploris teachers and students collaborate with local scientists from NCSU, NCMNS, and the Museum of Life and Sciences to involve 100% of Exploris students in Citizen Science projects each year.</p> <p>An Exploris staff member and three students (grades 2, 7, and 8) presented at the national citizen science conference, CitSci, in March 2019.</p>
<p>University of North Carolina Wilmington (UNCW) Masters of Arts in Teaching (MAT) Program</p> <p>UNCW Innovation Network - Teacher Advisory</p>	<p>Exploris staff provided PBL unit mentoring for current UNCW MAT students.</p> <p>Exploris staff led PD session for UNCW MAT students and hosted a site visit.</p>
U.S. Green Ribbon - NC Consultant	Exploris staff consulted NC schools on the Green Ribbon certification process. Also, school staff published a ten-part series through EdNC.
Peaceful Schools NC	<p>Peaceful Schools NC establishes relationships with partner schools who receive ongoing professional development in creating and sustaining healthy learning environments. Based out of the Carolina Friends School in Durham, NC, Peaceful Schools NC is run by teachers, for teachers.</p> <p>The Exploris School plans to partner with Peaceful Schools NC for the 2019-2020 school year. Although still under development, the plan is that some contract hours will be reserved for the EDEX Collaboratory for the purpose of guidance with the business side of the EDEX Collaboratory.</p>

6. FINANCIALS

A. OPERATING BUDGET

Like other schools offering professional development, the EDEX Collaboratory will need the support of external funding to be financially sustainable and, when possible, offset professional development costs for educators. Securing external funding will be imperative for reaching the goals and vision outlined in this business plan.

The projected operating budget for 2019-2020 includes a total revenue of \$141,320, total costs amount of goods and services of \$19,755, total gross margin of \$1,565, and total operating expenses including a 5% reserve and salaries and benefits of \$121,463. These projections include \$120,000 of fundraising to offset costs and keep prices low for teachers. Detailed financial projections and assumptions can be found in Appendix B and linked [HERE](#).

Each year the EDEX Collaboratory will need to raise external funds. For year three, 2021-2022, and beyond it is the intent of the EDEX Collaboratory to begin the creation of an endowment.

B. FUNDRAISING

There is a goal to raise \$500,000 in three years and begin funding for an endowment. Reaching these goals will increase access and keep costs low for individual educators. We will raise funds from a variety of sources.

Grants and Foundations

Securing significant grant funding will be essential to reach the goals of the EDEX Collaboratory. When looking at fundraising options and the foundations that have funded similar initiatives, an important factor to many grant funders is supporting a cause that delivers equitable education to all children regardless of economic status. Exploris's new weighted lottery system and our continued plan to increase the number of educationally disadvantaged students should be highlighted. Additionally, the fact that we are not focusing on a single subject area in our programs should aid in being considered by a broader range of foundations. We will look at both local and national grant opportunities and also foundations that have funded similar initiatives. However, the grant cycle takes significant amount of time. Other funding options will need to be considered to support the work of the EDEX Collaboratory for the 2019-2020 school year.

The Exploris School and its staff have received grants, in-kind donations, and awards from The Burroughs Wellcome Fund, The Fletcher Academy, Communities In Schools, and The Morgan Creek Foundation. In addition to previous and current donors, new relationships will need to be developed.

Corporate Sponsors

The EDEX Collaboratory will seek support from corporate partners that align with our mission and vision. Corporate sponsors will be recognized as supporters of education. Also, sponsors will receive recognition for their support both online and in print materials.

Donations

There will need to be significant fundraising through donations in order to get the EDEX Collaboratory up and running in August 2019. Securing funding will become the primary initiative for the next three months.

8. TIMELINE

Date	Milestone
3/20/19	Review by Foundation Board
3/25/19	Lead School Tour
4/10/19	Lead School Tour
4/25/19	Business Plan and Executive Summary complete
5/1/19	Name and Mission Statement
5/1/19	Register name
5/1/19	Purchase domain and website
5/15/19	Logo and "one sheet" complete
5/15/19	Post job and accept applications
6/1/19	K-8 Expedition Snapshots are ready to be published online
6/1/19	Begin fundraising/applying to grants
7/15/19	Draft website is complete, ready for feedback
6/15/19	Interview and make an offer to EDEX Collaboratory director
8/15/19	<ul style="list-style-type: none"> ● Create content ● Website fully functional ● Marketing materials designed & purchased ● Select dates for PD offerings ● Registration begins ● Marketing begins
9/15/19	Interview and select guest instructors and social media ambassadors
9/2019	First program of 2019-2020 is offered

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APPENDIX

A. OVERVIEW OF SELECTED COMPETITION

Comparison of Online Professional Learning Resources

Online Resources	Details	Offerings
<p>Edutopia</p> <p>The George Lucas Foundation</p> <p>https://www.edutopia.org/</p>	<p>Website featuring “what works in education” through blog entries and videos highlighting innovation and best practices</p> <p>Staff and guest bloggers write blogs</p> <p>Guest bloggers are paid a stipend per published blog entry</p> <p>Over 1.3 million facebook fans</p> <p>Over 1 million twitter followers</p> <p>Over 2 million website visitors per month</p>	<p>Blogs and videos about many topics including:</p> <ul style="list-style-type: none"> - Assessment - Integrated studies - PBL - Social emotional learning - Teacher development - Technology integration <p>All content is free</p>

Online Resources	Details	Offerings
<p>The Epic Classroom</p> <p>Trevor Muir</p> <p>http://www.trevormuir.com/</p>	<p>Trevor Muir’s work emphasizes creative thinking, real-world PBL, and motivational support on how to make teaching and learning “epic”</p> <p>Motivational YouTube Channel has several videos with the most viewed video having 47,000 views</p> <p>3,500 Twitter followers</p>	<p>1-day PBL workshops (paid)</p> <p>Free videos and blogs with podcasts (weekly)</p> <ul style="list-style-type: none"> - YouTube Channel <p>One published books on Amazon</p> <p>Speaking engagements including conferences and keynotes and school-based PD</p>

Online Resources	Details	Offerings
<p>The Creative Classroom</p> <p>John Spencer</p> <p>http://www.spencerauthor.com/</p>	<p>John Spencer’s work emphasizes creative thinking, design thinking, making/ makerspaces, PBL, and motivational support</p> <p>Spencer’s online courses are hosted through the website, Blend</p> <p>14,000+ Twitter followers</p>	<p>Online courses:</p> <ul style="list-style-type: none"> - 7 courses: 5 paid, 2 free <p>Free videos and blogs with podcasts (weekly)</p> <p>Two published books on Amazon</p> <p>Free online tools and booklets:</p> <ul style="list-style-type: none"> - LAUNCH Design Thinking - Empower - PBL - Flow Theory <p>Speaking engagements including conferences and keynotes and school-based PD</p>

Online Resources	Details	Offerings
<p>Cult of Pedagogy</p> <p>Jennifer Gonzalez</p> <p>https://www.cultofpedagogy.com/</p>	<p>Jennifer Gonzalez’s work emphasizes technology integration strategies as well as effective ELA teaching strategies and motivational support</p> <p>According to Gonzalez’s website, her work receives over:</p> <ul style="list-style-type: none"> - 100,000 unique downloads per month - 23,000 downloads per month per podcast episode <p>Gonzalez’s online courses are hosted through the website, Blend</p> <p>86,000 Twitter followers</p>	<p>Paid online courses:</p> <ul style="list-style-type: none"> - Jumpstart: Technology - Twitter for Teachers <p>Free videos and blogs with podcasts:</p> <ul style="list-style-type: none"> - The Craft, Go Deep, and Teacher Soul (2 per month) <p>Two books published:</p> <ul style="list-style-type: none"> - 1 through Amazon and 1 published online <p>Paid printables through Teachers Pay Teachers</p> <p>Online store for “swag”, courses, recommended books, and materials</p>

		Speaking engagements including conferences and keynotes and school-based PD
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Online Resources	Details	Offerings
<p>The Cornerstone for Teachers</p> <p>Angela Watson</p> <p>https://thecornerstoneforteachers.com/</p>	<p>Angela Watson emphasizes strategies to help teaching being effective, efficient, and enjoyable</p> <p>Her work is a blend of motivational principles and practical tips</p> <p>According to Watson’s website, her work receives over:</p> <ul style="list-style-type: none"> - 50,000 downloads of podcast per month - 8 million individual web page views in 2018 - 135,000 followers on Facebook - 45,000 followers on Pinterest <p>Over 18,500 Twitter followers</p> <p>Online courses are hosted through Watson’ website</p>	<p>Paid online courses:</p> <ul style="list-style-type: none"> - 40 Hour Teacher Workweek Club - Finally Free - Proactive Behavior Management Course <p>Free blogs with podcasts:</p> <ul style="list-style-type: none"> - Truth for Teachers (weekly) <p>Five published books on Amazon:</p> <ul style="list-style-type: none"> - Two active online Book Club Communities <p>Paid printables through Teachers Pay Teachers</p> <p>Speaking engagements including conferences and keynotes and school-based PD</p>

Comparison of Schools Leading Professional Development

High Tech High (HTH) - network of 14 charter schools in San Diego, CA

Funding: HTH is heavily funded through grants, plus receives revenue from its professional development programs, tours and Graduate School of Education. In 2010, HTH received \$25,000 from the Hewlett Foundation, \$100,000 in 2012 from the Bill and Melinda Gates Foundation and \$10.3 million from the Bill and Melinda Gates Foundation over 5 years starting in 2018.

Key Takeaways from HTH:

HTH is operating on a much larger scale than Exploris, but much of what they're doing is relevant and similar to the mission of the EDEX Collaboratory. Characteristics include: PBL-focus, student-led tours, classroom observation, teacher and faculty-led interactive workshops, actionable plans, immersion in the school setting, mentoring by teachers, and opportunities to engage with students and staff.

Professional Development Programs	Additional Information	Cost
Student led tour		Free
Extended Visits	<ul style="list-style-type: none"> ● Student guided ● Meet w/ HTH leadership ● Lunch panel w/ teachers or students ● Classroom observations 	\$250 pp
Customer Residencies	<ul style="list-style-type: none"> ● Help participants implement equitable learning experiences in their context ● PBL learning focused ● Immersed in K-12 setting for deeper learning 	\$350 pp
GSE PD Events	<ul style="list-style-type: none"> ● 3-day, in-depth experience led by K-12 teachers, students and faculty ● Interactive sections with workshops and classroom visits 	\$800 pp
Deeper Learning Conference	<ul style="list-style-type: none"> ● Premier international event for educators who want to implement deeper learning in classroom ● Includes materials, meals, dinner reception, morning activities, access to MakerStudio 	\$750 PP

Mt. Vernon Presbyterian School - Mount Vernon Institute for Innovation (MVIFI) - Atlanta, GA

MVPS is an independent (tuition-based) K-12 school that promotes real-life learning with the motto, “we blur the lines between school and the real world.”

MVIFI has 8 leaders that also have various roles as MVPS educators, such as the Executive Director of MVIFI also serving as the Chief Learning and Innovation Officer at MVPS and the Upper School Head of Learning at MVPS also serving on the MVIFI “nucleus team”.

Funding: MVIFI is heavily funded through grants, such as \$13,200 grant in 2016 from the Arthur M. Blank Family Foundation, \$100,000 in 2017 from the Christian Education Charitable Trust (MacLellan Foundation), and \$100,000 in 2018 from the Edward E. Ford Foundation to enhance the school’s design and maker community through a partnership with the Georgia Institute of Technology Design Bloc.

Key Takeaways from MVIFI: MVPS uses MVIFI as a contributor and accelerator for the school and they feel a strong responsibility to strengthen the efforts others are making to enhance people's learning experiences. Their prices are moderately low and they also provide a large amount of valuable free content. This shows they are generous with their sharing of information and committed to being a catalyst for innovation in education on a larger scale.

Professional Development Programs	Additional Information	Cost
School Visits	<ul style="list-style-type: none"> • Experiential workshop, guided tours and instruction • Networking opportunities 	\$100 pp
FlashLab	<ul style="list-style-type: none"> • 8-11:30am • Take a “full lap” in design thinking • Hands-on, fun, collaborative 	\$300 pp
FUSE conference	<ul style="list-style-type: none"> • Explores possibilities of design thinking, the maker movement, entrepreneurship and innovation • For leaders in education and corporations 	\$895 pp (\$795 early bird)
Fuse Talks	<ul style="list-style-type: none"> • Similar to TedTalks • 4 hours • Series of nationally-renowned speakers 	\$200 pp (\$175 early bird)

The Hill Center - Durham, NC

The Hill Center offers professional development “Empowering Educators to Support Struggling Learners”. Hill draws on its own faculty and in-house trainers, North Carolina Department of Public Instruction trainers, and leading experts to deliver professional development in Hill methodologies, literacy and math instruction, and other instructional strategies to support their students.

Professional Development Programs	Additional Information	Cost
One-day workshops	<ul style="list-style-type: none"> ● 8:30am - 3:30pm ● Includes materials, lunch and documentation for CEUs, free parking 	\$350 pp
Online courses	<ul style="list-style-type: none"> ● 5, self-paced online courses ● Anytime access to course materials, including downloadable resources for up to a year 	\$100 each
Education series	<ul style="list-style-type: none"> ● Offered 6-8 times/yr ● Open to the public and feature various speakers 	Free

Funding: The North Carolina GlaxoSmithKline Foundation has been instrumental in Hill’s growth over the years and supported the initial development of their teacher training program in 1990, as well as several other foundations, such as the FM Kirby Foundation, Barnhill Family Foundation and the Oak Foundation.

Key Takeaways from The Hill Center: While The Hill Center’s target market is different from the EDEX Collaboratory, the general mission of the professional development and offerings are similar. The Hill Center’s pricing is moderate, particularly for the length of their workshops and the online courses provide a convenient and low cost option for teachers to learn at their own pace.

Ron Clark Academy - Atlanta, GA

The Ron Clark Academy (RCA) is a tuition-free public charter middle school located in Southeast Atlanta. Over 40,000 educators have attended their professional development over 10 years. The campus includes a 44,000 sq ft facility with 14 classrooms, a media center, 2-story slide, a dragon staircase, dance studio and gymnasium.

Professional Development Programs	Additional Information	Cost
One-day training	<ul style="list-style-type: none"> ● Observe master teachers in action ● Attend workshops ● Experience school culture and student engagement 8:30am-4:30pm ● Subjects include strategies for effective discipline, teaching creatively while achieving high standardized tests 	\$495 pp
Two-day training	<ul style="list-style-type: none"> ● More in-depth, additional observation, strategies, time for reflection 	\$925 pp

Funding: RCA has many large corporate sponsors including Coca Cola, Verizon, Delta, Panasonic and BB&T. Also, Oprah Winfrey donated \$5 million that will go towards the creation of the Ryan Marshall Performing Arts Center, a 32,000 sq. ft. multi-purpose facility that will help the school train 150,000 teachers over the next 10 years. RCA spends \$18,000 per student, compared to the per student average in Georgia of \$8900.

Key Takeaways from RCA: RCA is the high cost option with all the bells and whistles and the brand of their school fits that model with an over-the-top campus and spokesperson and spending more than twice per student than average in Atlanta. This is very different from Exploris’s brand and track record of doing a lot with a little. While their professional development seems top notch both from an experience and learning perspective, their brand is extremely different from Exploris.

Research Triangle High School (RTHS) - Research Triangle Park, NC

RTHS is a 9-12 STEM charter school that is “committed to incubating, proving and scaling innovative methods of teaching and learning, for the express purpose of sharing transformative innovations with the rest of our state.” They have specifically chosen to focus on digital assets as an outreach tool and also address teachers as learners within the community.

Professional Development Programs	Additional Information	Cost
Educator’s showcase	<ul style="list-style-type: none"> ● Highlight 3 lesson plans and provide curriculum, including online videos, assignments and tests 	Free

Moodle access	<ul style="list-style-type: none"> • Online repository of lesson plans from each teacher 	Free
Educator visits	<ul style="list-style-type: none"> • Hosts 200 teachers and school leaders to learn about their model of Personalized Learning • See an entire PL school, observe classrooms and talk to teachers/school leaders 	Free

Funding: Their programs are free to attendees and funding is provided by the NCDPI Digital Learning Initiative Grant and The Friday Institute at NC State University. Stipends are available to subs and travel costs.

Key Takeaways from RTHS: RTHS holds strong to its commitment to share innovative teaching methods by offering free support for educators although their offerings are not very rich or deep. The online instructional materials posted are inconsistent in quality between teachers. Also, the school offers no follow-up coaching to support implementation of learning.

B. FINANCIAL PROJECTIONS

Link to the financial projections can be found [HERE](#).

The financial projections link includes six sheets:

- Overview
- Profit & Loss Year
- Profit & Loss Quarter
- Sales Projections
- Costs of Goods Sold
- Staffing Plan
- Expenses

Screenshots of Profit & Loss Year are included here.

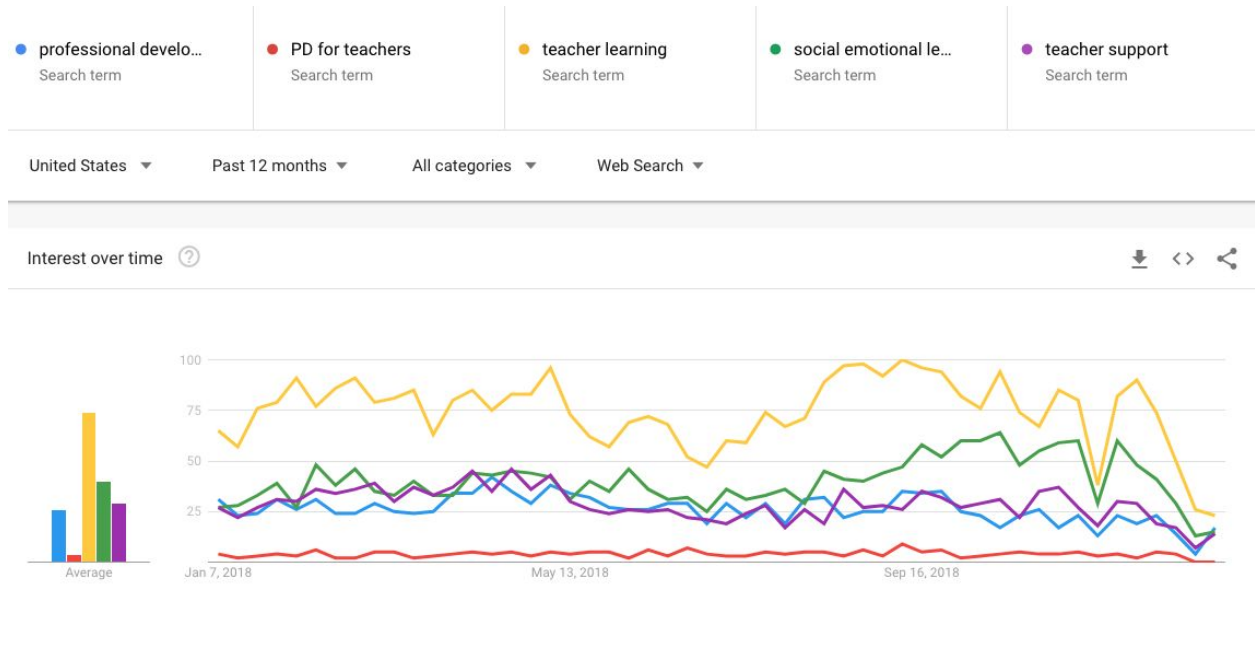
P & L by Year									
		Source	2019-2020		2020-2021		2021-2022		
Revenue									
	School Tours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%	
	School Visits	P&L By Qtr	\$ 1,500	7%	\$ 1,750	4%	\$ 2,000	2%	
	Study Visits	P&L By Qtr	\$ 6,000	28%	\$ 12,250	27%	\$ 14,000	13%	
	Guest Expert PD	P&L By Qtr	\$ 4,000	19%	\$ 8,000	17%	\$ 8,000	7%	
	Inspiration Project	P&L By Qtr	\$ 8,000	38%	\$ 8,000	17%	\$ 16,000	15%	
	Network Celebration	P&L By Qtr	\$ 1,800	8%	\$ 2,400	5%	\$ -	0%	
	Network Conference	P&L By Qtr	\$ -	0%	\$ -	0%	\$ 18,750	17%	
	Office Hours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%	
	Online Network	P&L By Qtr	\$ -	0%	\$ 5,625	12%	\$ 33,125	30%	
	Podcast Sponsors	P&L By Qtr	\$ -	0%	\$ 8,000	17%	\$ 18,000	16%	
	Amazon Affiliate	P&L By Qtr	\$ 20	0%	\$ 125	0%	\$ 280	0%	
	Teachers Pay Teachers	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%	
	Total Revenue		\$ 21,320	100 %	\$ 46,150	100 %	\$ 110,155	100 %	

COGS								
	School Tours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
	School Visits	P&L By Qtr	\$ 645	3%	\$ 753	2%	\$ 860	2%
	Study Visits	P&L By Qtr	\$ 7,200	36%	\$ 12,600	38%	\$ 14,400	33%
	Guest Expert PD	P&L By Qtr	\$ 7,200	36%	\$ 14,400	44%	\$ 14,400	33%
	Inspiration Project	P&L By Qtr	\$ 3,600	18%	\$ 3,600	11%	\$ 7,200	17%
	Network Celebration	P&L By Qtr	\$ 1,110	6%	\$ 1,480	5%	\$ -	0%
	Network Conference	P&L By Qtr	\$ -	0%	\$ -	0%	\$ 6,438	15%
	Office Hours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
	Online Network	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
			\$ 19,755	93%	\$ 32,833	71%	\$ 43,298	39%
Gross Margin								
	School Tours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
	School Visits	P&L By Qtr	\$ 855	55%	\$ 998	7%	\$ 1,140	2%
	Study Visits	P&L By Qtr	\$ (1,200)	-77%	\$ (350)	-3%	\$ (400)	-1%
	Guest Expert PD	P&L By Qtr	\$ (3,200)	-204%	\$ (6,400)	-48%	\$ (6,400)	-10%
	Inspiration Project	P&L By Qtr	\$ 4,400	281%	\$ 4,400	33%	\$ 8,800	13%
	Network Celebration	P&L By Qtr	\$ 690	44%	\$ 920	7%	\$ -	0%
	Network Conference	P&L By Qtr	\$ -	0%	\$ -	0%	\$ 12,313	18%
	Office Hours	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
	Online Network	P&L By Qtr	\$ -	0%	\$ 5,625	42%	\$ 33,125	50%
	Podcast Sponsors	P&L By Qtr	\$ -	0%	\$ 8,000	60%	\$ 18,000	27%
	Amazon Affiliate	P&L By Qtr	\$ 20	1%	\$ 125	1%	\$ 280	0%
	Teachers Pay Teachers	P&L By Qtr	\$ -	0%	\$ -	0%	\$ -	0%
	Total GM		\$ 1,565	7%	\$ 13,318	29%	\$ 66,858	61%

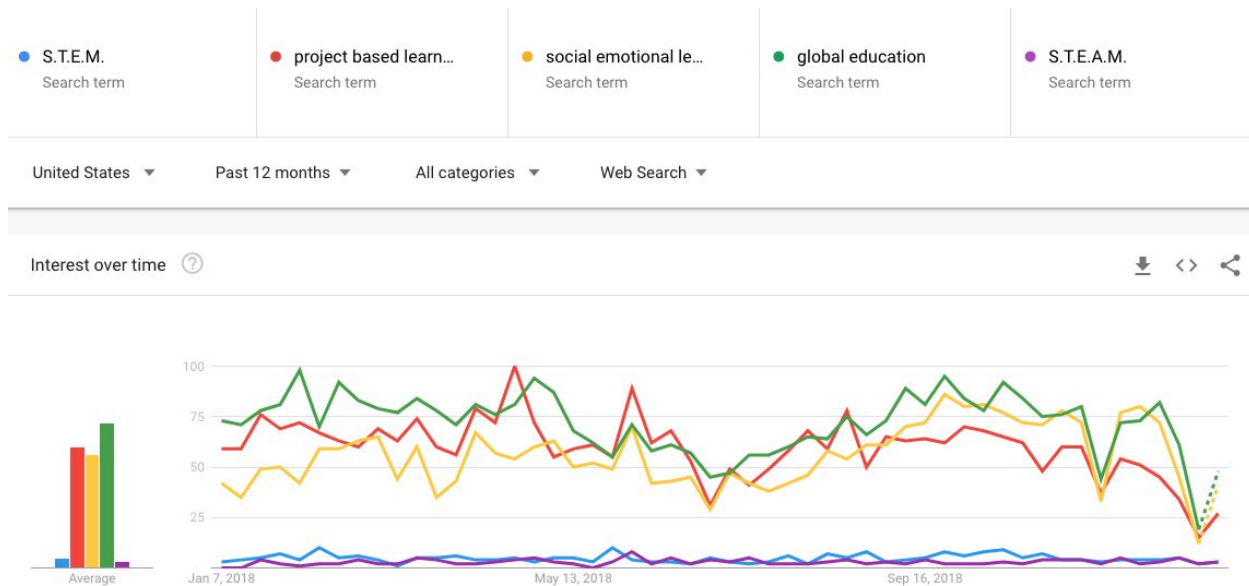
Expenses									
	Employees	P&L By Qtr	\$ 81,120	67%	\$ 133,215	71%	\$ 168,850	70%	
	Facilities	P&L By Qtr	\$ 9,360	8%	\$ 9,360	5%	\$ 18,000	7%	
	Professional Services	P&L By Qtr	\$ 7,161	6%	\$ 7,161	4%	\$ 7,161	3%	
	Operations	P&L By Qtr	\$ 11,356	9%	\$ 21,701	12%	\$ 28,721	12%	
	Marketing	P&L By Qtr	\$ 5,400	4%	\$ 5,400	3%	\$ 4,400	2%	
	Other	P&L By Qtr	\$ 7,066	6%	\$ 11,058	6%	\$ 14,258	6%	
	Operating Exp.		\$ 121,463	570 %	\$ 187,894	407 %	\$ 241,389	219 %	
Operating Profit			\$ -562 (119,898)	%	\$ -378 (174,577)	%	\$ -158 (174,532)	%	
Fundraising			\$ 120,000		\$ 175,000		\$175,000		
Annual Profit			\$ 102		\$ 424		\$468		

C. SUPPORTING DATA AND TRENDS ANALYSIS

1. Google Trends analysis showing 12 month search volume of the following phrases: “professional development for teachers”, “PD for teachers”, “teacher learning”, “social emotional learning” and “teacher support”.

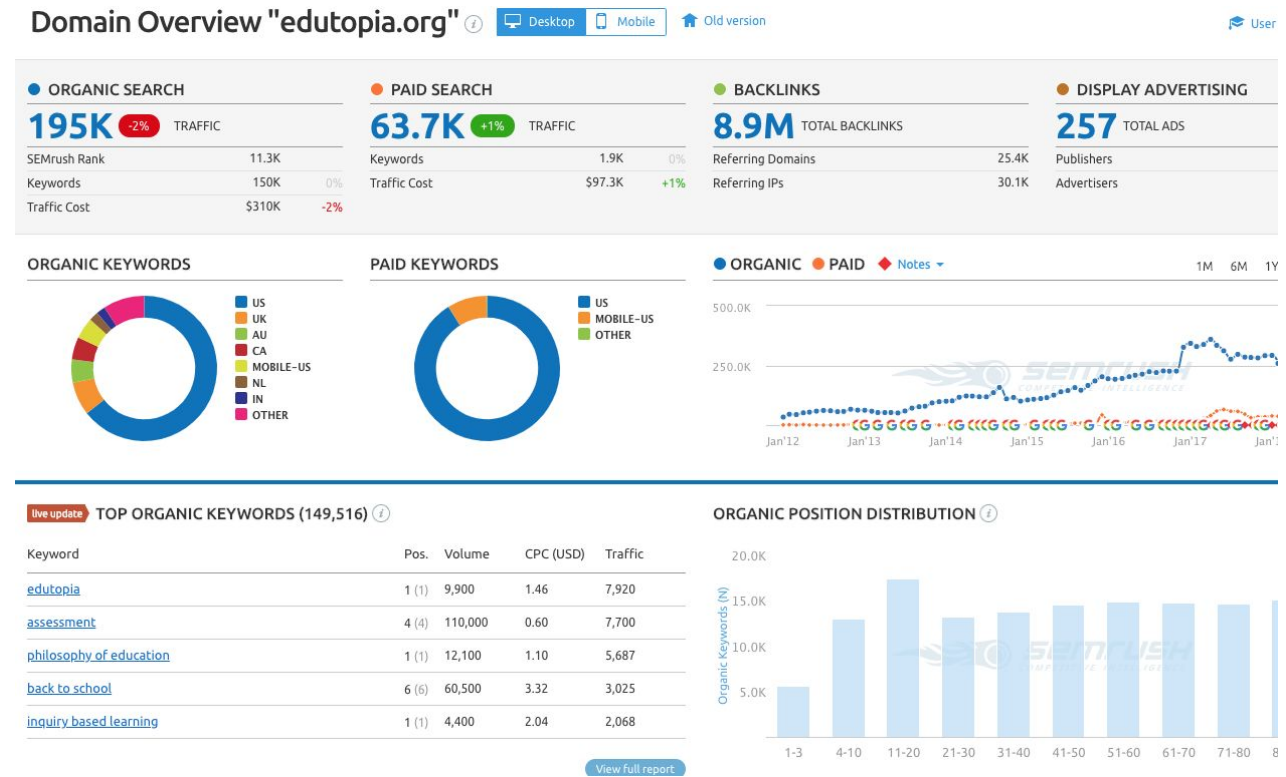


2. Google Trends analysis over 12 month period comparing search volume for phrases: “S.T.E.M.”, “project based learning”, “social emotional learning”, “global education” and “S.T.E.A.M.”



Google Trends analysis over a 12 month period

3. Edutopia.org attracts roughly 2.1M visitors to their site per month. Under “Top Organic Keywords” on the bottom left, you can see the top search terms and volume that visitors are searching for: “edutopia” (this is typical to have the top word be the brand name), “assessment”, “philosophy of education”, “back to school” and “inquiry based learning”. This is a good way to see what educators are searching for/interested in.



4. Top searches on Teachhub.com. This is another way to view what educators are searching for and interested in.

Organic Search Positions 1 - 100 (670) ⁴ teachhub.com Manage columns 14/14 Expo

	<input type="checkbox"/>	Keyword	Pos. ↕	Diff. ↕	Traffic ↕	Volume ↕	KD% ↕	CPC (USD) ↕	URL	Costs (USD) ↕	Com. ↕	Results ↕	Volume Trend	SERP	Last Update
>	<input type="checkbox"/>	vocabulary strategies	1 → 1	0	611	1,300	72.54	2.16	http://www.tea...lary	1.3K	0.02	103M			Dec 28, 2018
>	<input type="checkbox"/>	smart boards in the classroom	1 → 1	0	470	1,000	74.21	1.84	http://www.tea...ards	864	1.00	48.1M			Dec 27, 2018
>	<input type="checkbox"/>	professional goals examples for teachers	1 → 1	0	338	720	56.65	2.18	http://www.tea...oals	737	0.12	85.5M			Dec 27, 2018
>	<input type="checkbox"/>	hands on activities	1 → 1	0	338	720	73.01	1.10	http://www.tea...ties	372	0.08	832M			Dec 28, 2018
>	<input type="checkbox"/>	facts about teachers	1 → 1	0	338	720	64.59	1.84	http://www.tea...acts	622	0.05	609M			Dec 28, 2018
>	<input type="checkbox"/>	professional goals for teachers	1 → 1	0	338	720	61.38	1.55	http://www.tea...oals	524	0.16	229M			Dec 27, 2018
>	<input type="checkbox"/>	list of professional goals for teachers	1 → 1	0	225	480	59.88	1.83	http://www.tea...oals	412	0.16	105M			Dec 27, 2018
>	<input type="checkbox"/>	teaching skills	3 → 3	0	171	1,900	64.57	3.23	http://www.tea...ster	552	0.03	578M			Dec 28, 2018
>	<input type="checkbox"/>	21st century teacher valentine day activities for high school students	1 → 1	0	150	320	63.49	1.24	http://www.tea...ooks	186	0.12	90.5M			Dec 28, 2018
>	<input type="checkbox"/>	literacy night	1 → 1	0	150	320	69.65	0.00	http://www.tea...ties	0	0.07	68.6M			Dec 28, 2018
>	<input type="checkbox"/>	fun review games	1 → 1	0	122	260	72.46	0.00	http://www.tea...ight	0	0.04	87.9M			Dec 28, 2018
>	<input type="checkbox"/>	professional development skills	1 → 1	0	122	260	56.06	0.91	http://www.tea...now	111	0.02	1.4B			Dec 28, 2018
>	<input type="checkbox"/>	morning	4 → 4	0	112	1,600	79.17	0.00	http://www.tea...hers	0	0.06	1.4B			Dec 28, 2018
>	<input type="checkbox"/>		4 → 4	0	112	1,600	72.86	0.83	http://www.tea...tina	92	0.06	1B			Dec 28, 2018

Cover Sheet

PTO Quarterly Update

Section: VI. PTO Updates
Item: A. PTO Quarterly Update
Purpose: FYI
Submitted by:
Related Material: Exploris Budget Proposal 2019 to 20 03.19.2019.pdf

**Exploris Charter School PTO
Proposed Budget
2019-2020**

	19-20 Budget	Actual	Remaining	Notes
Revenue				
Auction	-		-	Net expenses (below)
Spirit Wear Income	500		500	Net expenses (below)
Passive Fundraising Income	1,000		1,000	Net expenses (below)
Art By Me Income	2,000		2,000	Net expenses (below)
Dance Income	1,500		1,500	
Optional Dues	750		750	
	-		-	
Total Income	5,750	-	5,750	

Expense	Category			
Spirit Wear expenses	FR	4,500		4,500
Art By Me expenses	FR	3,800		3,800
Passive Fundraising	FR			-
Auction	FR			-
PTO Website	Admin	50		50
Slush Fund	Admin	1,000		1,000
Sunshine Committee	Teachers	1,800		1,800
Teacher & Staff Appreciation	Teachers	1,500		1,500
Teacher & Staff Hospitality	Teachers	1,000		1,000
Teacher Classroom Fund	Teachers	2,400		2,400
Teacher Stash	Teachers	1,000		1,000
Graduation	Students	600		600
Backup Lunches	Students	800		800
Club Grants	Students	500		500
Dance	Students	2,000		2,000
Crew Activities	Students	1,800		1,800
Adult Social/Fall Social	Community	1,500		1,500
Back-to-School Picnic	Community	150		150
Spring Family Day	Community	1,500		1,500
Tissues & Tea	Community	100		100
Total Expense		17,700	-	17,700
Net Income		-	-	(11,950)

We could easily cut expenses by 1/3 by eliminating these line items:

- Fall Social (\$1500)
- Back up lunches (\$800)
- Birthday baskets (\$1800)
- Coffee (\$1000)

Birthday Baskets
 First week of May
 Breakfast/lunch/lunch for staff meetings
 \$100 per lead teacher
 Coffee/creamer for workrooms

Aim to raise 75% of this through admission fees

Questions?

Contact Kimberly Harris at 919-491-7125 or kimberlyannharris@yahoo.com

Cover Sheet

Governance Committee

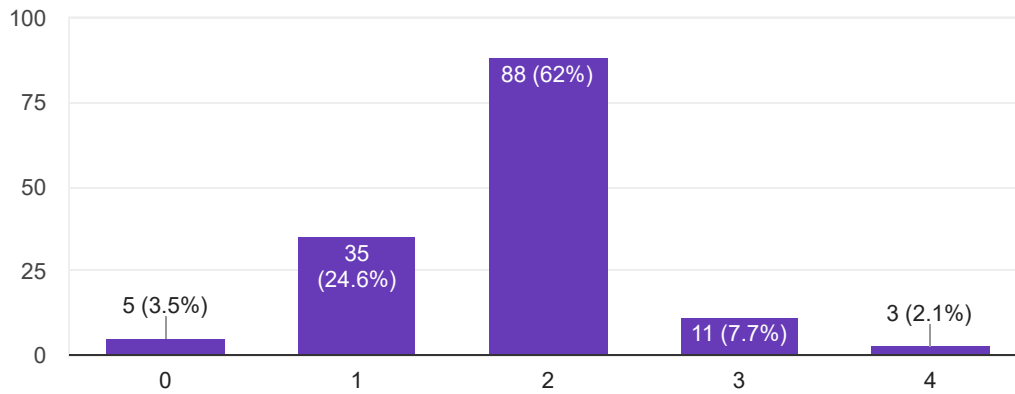
Section: VIII. Committee Updates
Item: B. Governance Committee
Purpose: Discuss
Submitted by:
Related Material: Volunteer Security Survey Background Checks.pdf

Volunteer Security Survey

142 responses

How many adults (parent, guardians, grandparents) from your family volunteer at Exploris?

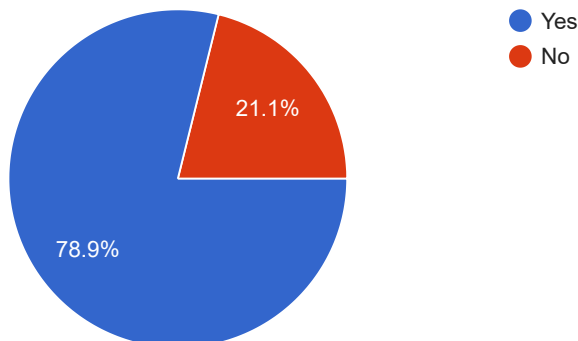
142 responses



Required Background Checks

Would you be in favor of requiring that all volunteers at Exploris submit to a criminal background check?

142 responses



Why Not?

If you answered no, why do you feel we should not do Volunteer Background Checks?

30 responses

Not worried about it and would become too much red tape

Volunteers at Exploris are typically family or friends of the school community in some way. Requiring an extra hoop to jump through in regards to volunteer background checks could reduce the willingness of some to step up and help, especially in an immediate need. I see this to be nothing but problematic and unnecessary for our school. It would also be an additional cost either to volunteers and/or the school, which again, seems unnecessary. Our ability to openly work with valued community members and businesses is part of what makes us unique as a school, and I would hate to see that be even slightly hindered.

I worry that this requirement will be a burden on families, especially those with financial difficulties. Also, it may slow down the process of getting enough volunteers.

Cost. Time. There should be some communication to volunteers that they should always be at least two children with them for everyone's piece of mind and protection.

I don't think it is needed for all situations. Today I participated in the Mad zCity Money event where the vast majority of volunteers were not connected to Exploris. Without then the event wouldn't have happened. For that type of fully supervised event there would be no need for a background check. For parents spending the night with or driving my kids on a field trip. That type of situation it might make sense.

It can be a barrier to getting folks to volunteer. Who pays for it? School? or Volunteer?

Maybe elementary aged kids are more vulnerable, but, in middle school, the volunteer opportunities don't seem to put the students at risk or in vulnerable situations. Any driving requires a driver's license so that is a certain level of scrutiny. Otherwise, volunteers seem to be paired with their child. Maybe I'm ignorant as to what unsafe potentials exist, but a background check seems an unnecessary expense - unless we can point to evidence otherwise.

No need for you to have social security numbers

Hassle, create a lack of volunteers, people who volunteer less than 3 times a year would be less likely to volunteer.

Sonja here - I said no b/c I know that background checks are expensive. Who would pay for this? As long as chaperones are never alone with a student I feel ok with non-background checked drivers and chaperones working with my child. Perhaps a chaperone training session and contract are needed for chaperones leading experiences for a significant amount of time (For example: Being the lead teacher for Explorations, reading with students each week, etc.). We used to have a volunteer contract for lead teachers and required training sessions during the first year of Explorations... I'm not sure if they still do this. Also, I do want background checks for anyone working 1:1 with students. Please feel free to reach out if you would like to talk more.

Too much extra admin and expense and I think then the school will be short on volunteers which it already is

I think all angles should be considered, when people are volunteering to work at a school, what is actually (if anything) caught on a background check.

It undermines the feeling of the school as a community and I think it will further reduce people's willingness to volunteer. I have never been worried about my children's interaction with volunteers.

1. I trust that on field trips there are a variety of volunteers and that one single volunteer shouldn't be able to put my child at risk. 2. I don't necessarily want each volunteer judged only on their past if they are currently doing fine. 3. I don't want to dissuade people from volunteering because of paperwork and put the programs I really love my kids attending at risk.

I think if we have 2 parents in each classroom that would be a safety measure.

Wouldn't be able to volunteer last minute if we didn't have a background check on file, the cost could prevent some families from volunteering, already have trouble getting enough volunteers for explorations and field experiences

I have a level of trust with the parent group there.

It feels excessive & overly cautious. We have not been given enough information about what the results of the background check would be used for. Also, I think that there are better ways for the school to spend that money.

Because I'm concerned about what get deemed ok on a criminal background check and what gets deemed not ok. Who decides?

time consuming, invasive, would lead to less volunteers

I feel only volunteers who are NOT parents be required to do a background check. I assume this would save the school quite a bit of \$\$ as compared to everyone being required (?)... In the six years we've had kids at Exploris, I've never felt unsafe with our kids being with any other parent. Of course, there should be a rule that any volunteer should never be alone with any single student.

n/a

it may discourage some - especially those who only plan to volunteer for a short duration - as the time required to perform background checks may be extensive

I think this would limit people being willing or able to volunteer. The awesome volunteers are part of what makes Exploris awesome! Could background checks be required for some things and not others? Maybe volunteers driving and/or chaperoning out of town get background checks, but not volunteers for on-campus?

Can be a costly expense for the way the school is run. Also background checks do not cover other states depending on how they are done. It also can depend on what the main concern is. If it is for sex offenders/predators or driving history? There may be a potential risk of a reduction of volunteers due to privacy

Do you have so many volunteers that you can afford to discriminate against parents with potential prior issues that may have nothing to do with their ability to volunteer and be a helpful member of the Exploris community?

Instead of adding the workload on the staff to administer a background check requirement, I think focusing on your own common sense policies/procedures that specifically apply to your situation (which I know you already do) is a better use of your time and energy. As a foster and adoptive parent I have had several background checks, and I understand that for liability reasons that you may feel it is best to require background checks. If you decide this, I will totally understand, and will happily have another background check done. As a parent, though, it will not make me feel that my children are any safer. Background checks might flag some things that do not have anything to do with one's qualification to volunteer, and also are likely to not indicate anything on an official record that actually may be a concern. The things that make me feel that my kids are safe at Exploris are 1) the consistent, attitude in the staff that I see they genuinely care for the kids. 2) The policy of locking all the doors and requiring people to be buzzed in the front desk, and 3) The policies and procedures the staff have with chaperones (like following "the rule of three") and the fact that there seems to be ample volunteers to chaperone when needed. I would be concerned that going through the hassle of background checks could discourage some people from volunteering and promote an environment of bureaucracy instead of the "Exploris family" environment that we love.

I worry that it would create another barrier for families/parents to be a part of the school community. If we are moving to increase our EDS- this would be an added burden on the family. I also like the feel that families can come to community circle and be able to volunteer to help out. I agree safety is important ..but wonder if there is a middle ground besides the background check. For example volunteer application with some questions...

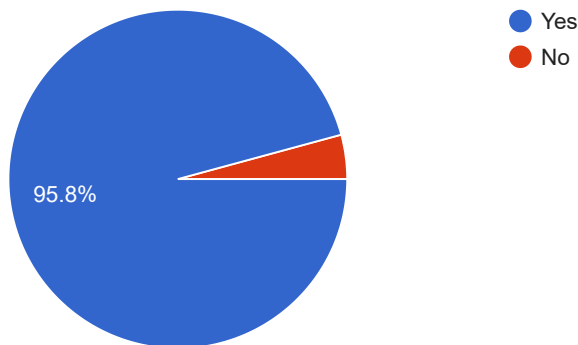
Don't know what the background checks require

Background checks are not inherently bad. However, you have not provided enough information on how they would be used. Are volunteers checked prior to each time they interact with students or just annually or every 5 years, etc.? What would be an incident that would prevent someone from volunteering? How long ago would the incident had to have occurred? Who makes the decision, the school board, the director, a panel, etc.? Background checks are often used instead of having robust policies in place and many organizations simply use them as a way of alleviating liability concerns rather than protecting students. How are background checks paid for? A primary strength of Exploris is the fact that it is a community based school. By requiring background checks you may run the risk of alienating the community from the school

Payment

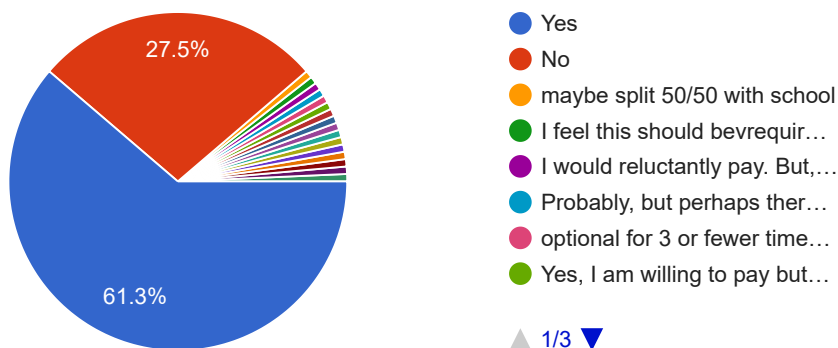
Would you continue to volunteer if a background check was required?

142 responses



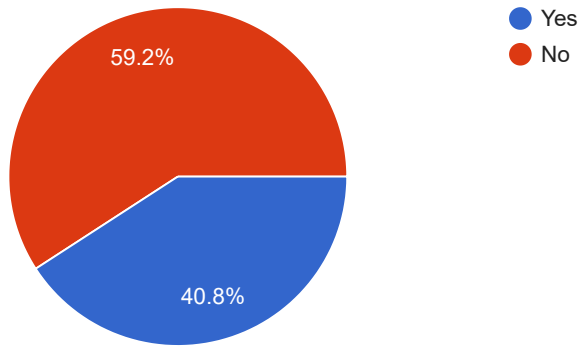
Would you be willing to pay the approximate cost of \$30 for your own background check?

142 responses



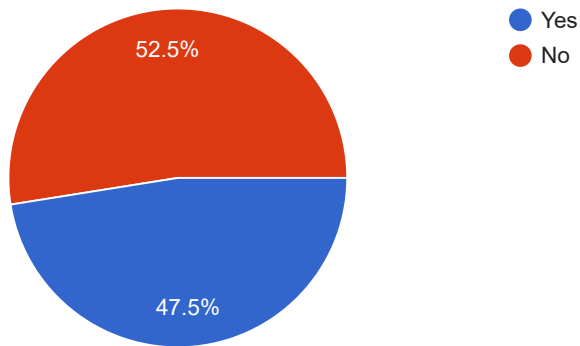
Would paying for your own background check reduce the number of volunteers from your family?

142 responses



Would you be willing to donate to fund to pay for backgrounds checks for those who cannot?

139 responses



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