

LHU Board of Directors Regular Meeting

June 25, 2025 6:30 PM

Sterling Montessori Academy and Charter School

202 Treybrooke Drive, Morrisville, NC 27560

Virtual via Google Meet

COMMENCEMENT

Call to Order and Board Attendance w/Determination of Quorum

At 6:30pm

Quorum Present with the following Board Members in Attendance:

<u>Name</u>	<u>Present</u>		<u>Name</u>	<u>Present</u>		<u>Name</u>	<u>Present</u>
Rachel Richardson	x		Dwayne Jones	x			
Kevin Hughes	x		Keisha Pressley	x			
Jessi Fasola	x		Susan English	x			
Ryan Hill	x		Daphne Coulter				

Reading of Mission Statement:

"The mission of Sterling Montessori is to create a diverse educational community, grounded in the Montessori philosophy and teaching practices, that fosters curiosity, creativity, and critical thinking in its students. We strive to empower each student to become life-long learners who respect themselves, others, and their environment."

Conflict of Interest Statement

"At this time, we ask all board members to make a statement to be recorded in the minutes should they know of any conflict of interest or appearance of conflict with respect to any matters coming before them during this meeting. It is the duty of each board member to abstain from discussion and voting on such matters."

202 TREYBROOKE DRIVE, MORRISVILLE, NORTH CAROLINA 27560

(T) 919.462.8889 | info@sterlingmontessori.org | (F) 916.434.7000

Native Land Acknowledgement

"The LHU Board recognizes that Sterling Montessori sits on the ancestral land of the Tuscarora, Lumbee and Occaneechi Band of the Saponi Tribes. As we strive to become better stewards of the environment, we also strive to provide a more equitable and culturally responsive environment for all students, but especially Black and indigenous students of color."

Agenda Items:

Including any related consent agenda items or discussion items added to agenda prior to consent vote.

Consent Agenda:

- Approval of 24-25 final budget
- Approval of 25-26 preliminary budget for DPI
- Approval of Hires
- Approval of May Regular Meeting Minutes
- Approval of Jun 23, 2025 Special Meeting Minutes

Discussion Items:

- Election of Officers
- Board evaluations, COI and Compliance Forms
- Budget Review
- Enrollment Update
- Executive Director qualifications and candidate priorities
- Marketing/Website Quote
- Communication plan for Payroll change to 10 month cycle
- Google Security Update requiring 2 step verification

Closed Session:

- To consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of a present or prospective public officer or employee [N.C.G.S. § 143-318.11(a)(6)].

Approval of Agenda

At 6:50p, Rachel Richardson moved to approve the agenda. Approved

Name	Aye	Nay	Abs		Name	Aye	Nay	Abs		Name	Aye	Nay	Abs
Rachel Richardson	M				Dwayne Jones	x							
Jessi Fasola	x				Keisha Pressley	x							
Ryan Hill	x				Susan English	x							
Kevin Hughes	x				Daphne Coulter								

REPORTS AND PRESENTATIONS

Please hold community comments until the end of ALL presentations. Board members may ask clarifying questions at this time of the presenter. Any board member may move to refer further discussion or other action back to the committee, with a vote.

Executive Director's Report – Elizabeth Uzzell

- Presentation of the report.
- Discussion on enrollment and if we should look at the waitlist for academy preferred based on our recent approval for Academy preference.
- Discussed ideas around family events for the summer and how we

Communications Committee Report - Ryan Hill

- Susan English joining communications
- Schedule a meeting.

Finance Committee Report - Jessi Fasola

- Jessi Fasola presented the report.
- Discussed Marketing budget and the possibility of funds for the website.
- Communications on the payroll shift from 12 months to a 10-month pay cycle.
 - Finance will plan the next communications and potentially connect with credit

Policy Committee Report - Kevin Hughes

- Kevin Hughes reviewed the report highlights
- How will we look at Financial Aid for Children's House for scholarships or a sliding scale.
- Discussed the lottery preference
- Sending a question of a travel fund for teachers to development.

Development Committee Report – Daphne Coulter

- Discussion around grassroots marketing efforts with alumni

Governance Committee - Keisha Pressley

- Keisha Pressley reviewed the report highlights
- Talked about recruitment and succession planning
- Challenge board members to find other members and diversify the board.

Strategic Planning Committee Report - Ryan Hill

- Committee will recommend a series of reports to request from our data and HR partners

Search Committee - Dwayne Jones

- Dwayne giving overview on input for leadership qualities
- Clarity on posting, who, where and when?
- Updates on the process

Community Comments (3 minute time limit)

Members of the public are now invited to provide comments on issues or concerns related to the school. To indicate your interest in speaking, please raise your hand. The Board Secretary will record names of speakers with a brief summary of comments. The board will not directly respond to any comments during this time. Please provide contact information to president@lhuf.org to allow for follow-up by the appropriate officer or committee chair. Formal comments may be emailed to president@lhuf.org ahead of any regular meeting to be considered for agenda/discussion.

Speakers are welcome to offer comments or criticism directed at substantive ideas, actions, or procedures of the school and LHU Board. In the interest of maintaining civility and decorum, however, speakers are encouraged to refrain from criticism or personal attacks directed at specific members of the Board, school staff, or members of the community.

The laws and policies of North Carolina provide that issues or concerns involving individual personnel matters are confidential, and, therefore, not appropriate for public comment settings. Concerns related to personnel issues may be addressed through appropriate school leadership, the Sterling grievance policy, or other applicable policies.

Speakers may discuss issues and matters of general concern but must refrain from discussing confidential student information. Concerns related to confidential student matters may be addressed through school leadership, the grievance policy or other applicable policies.

Comments:

- No Community Comments

APPROVAL OF CONSENT AGENDA

Consent agenda items are non-controversial items unanimously recommended for approval by all involved parties and have already been reviewed by the board and Executive Director. Any board members or the Executive Director may request to pull items off the consent agenda.

Approval of Consent Agenda Items.

- Approval of 24-25 final budget
- Approval of 25-26 preliminary budget for DPI
- Approval of Hires
- Approval of May Regular Meeting Minutes
- Approval of Jun 23, 2025 Special Meeting Minutes

At 8:57p Rachel Richardson moved to approve Consent Agenda Items. Approved.

<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>
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Rachel Richardson	M				Dwayne Jones	x							
Jessi Fasola	x				Keisha Pressley	x							
Ryan Hill	x				Susan English	x							
Kevin Hughes	x				Daphne Coulter								

DISCUSSION ITEMS

- Election of Officers
- Board evaluations, COI and Compliance Forms
- Budget Review
- Enrollment Update
- Executive Director qualifications and candidate priorities
- Marketing/Website Quote

Election of Officers

At 8:58pm, Rachel Richardson moved to nominate and elect Rachel Richardson as President, Kevin Hughes as Vice President, Jessi Fasola as Treasurer and Ryan Hill as Secretary of the LHU Board of Directors for June 2025 to June 2026. Approved

<u>Name</u>	<u>Ave</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Ave</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Ave</u>	<u>Nay</u>	<u>Abs</u>
Rachel Richardson	M				Dwayne Jones	x							

Jessi Fasola	x				Keisha Pressley	x						
Ryan Hill	x				Susan English	x						
Kevin Hughes	x				Daphne Coulter							

Closed Session

Closed Session

At 9:16pm, Rachel Richardson moved to go into closed session to consider the qualifications, competence, performance, character, fitness, conditions of appointment, or conditions of initial employment of a present or prospective public officer or employee [N.C.G.S. § 143-318.11(a)(6)].

Name	Aye	Nay	Abs		Name	Aye	Nay	Abs		Name	Aye	Nay	Abs
Rachel Richardson	M				Dwayne Jones	x							
Jessi Fasola	x				Keisha Pressley	x							
Ryan Hill	x				Susan English	x							
Kevin Hughes	x				Daphne Coulter								

Return to Open Session

At 10:15:pm, Rachel Richardson moved to return to open session.

Name	Aye	Nay	Abs		Name	Aye	Nay	Abs		Name	Aye	Nay	Abs
Rachel Richardson	M				Dwayne Jones	x							
Jessi Fasola	x				Keisha Pressley	x							



Ryan Hill	x				Susan English	x						
Kevin Hughes	x				Daphne Coulter							

ADJOURNMENT

At 10:16p, Elizabeth Uzzell moved to adjourn. Approved

<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>		<u>Name</u>	<u>Aye</u>	<u>Nay</u>	<u>Abs</u>
Rachel Richardson	M				Dwayne Jones	x							
Jessi Fasola	x				Keisha Pressley	x							
Ryan Hill	x				Susan English	x							
Kevin Hughes	x				Daphne Coulter								

Sterling 2025-26 Budget	2024-25	2025-26 Budget	
		CH = 200	CH = 175
ADM	633	599	599
State Funding per ADM	6,543	6,521	6,521
EC ADM	-	-	-
State EC Funding per ADM	-	-	-
State Funds - per 20th day ADM	4,141,586	3,905,875	3,905,875
State EC Funds	424,414	432,319	432,319
State - Growth Funding	-	-	-
State - NCVPS	(1,491)	(1,500)	(1,500)
State - LEP	72,174	85,897	85,897
State - Literacy Intervention - PRC 085	19,650	19,650	19,650
State - Other	36,399	20,056	20,056
Total State Funding	4,692,732	4,462,297	4,462,297
Wake County	1,941,000	2,026,919	2,026,919
Durham County	380,000	386,515	386,515
Chatham County	107,000	98,287	98,287
Johnston County	2,550	6,545	6,545
Granville County	4,700	4,674	4,674
Chapel Hill	16,000	16,680	16,680
Total County Funding	2,451,250	2,539,619	2,539,619
PRC 060	120,207	113,403	113,403
PRC 118	1,000	1,000	1,000
Total Federal Funding	121,207	114,403	114,403
Tuition - CH Academic Day	1,159,800	1,189,440	937,440
Tuition - CH Staff Children	23,400	8,060	8,060
Tuition - CH After Care	183,500	170,100	170,100
Tuition - CH Before Care	10,767	10,248	10,248
New Student / Application	25,250	25,000	25,000
Next Prep	3,000	3,400	3,400
Total Tuition	1,405,717	1,406,248	1,154,248
Sales Tax Refund	33,000	33,000	33,000
Development	45,000	45,000	45,000
Interest Income	183,000	150,000	150,000
After School Activities	15,350	10,000	10,000
Other Income	1,840	1,000	1,000
Rent Income	492,000	492,000	492,000
Total Other Revenue	770,190	731,000	731,000
Total Revenue	9,441,096	9,253,568	9,001,568
Salaries	5,349,894	5,251,709	5,251,709
Wages - BASC	85,000	92,080	92,080
Wages - After School Activities	8,300	7,500	7,500
Bonus - Christmas	9,745	10,000	10,000
Bonus - TA Montessori	1,500	1,500	1,500
Bonus - DPI	6,459	-	-
Bonus - Sign On	31,500	-	-

<i>Sterling 2025-26 Budget</i>			<i>2025-26 Budget</i>	
Personal Leave Pay	22,500		24,000	24,000
Summer Reading - PRC 016	17,800		16,000	16,000
Buyout fee for EC teacher	-		18,500	18,500
Contracted EC Services	140,000		140,000	140,000
Contracted - Data	-		24,800	24,800
Contracted - HR	3,540		22,140	22,140
Contracted - Technology	68,000		84,000	84,000
Health Insurance	572,019		639,496	639,496
Vision Insurance	5,436		5,436	5,436
Dental Insurance	59,128		57,365	57,365
Life Insurance (FT salaries * .252%)	12,345		12,641	12,641
Retirement - 403b ER match	64,199		84,027	84,027
Retirement Plan Fees	1,500		1,500	1,500
Unemployment Insurance - SUTA	14,000		17,500	17,500
FSA Expense	4,000		4,000	4,000
FICA / Medicare	384,490		373,183	373,183
Workers Comp Insurance	12,300		20,000	20,000
Total Personnel	6,873,655		6,907,377	6,907,377
Instructional Materials	120,800		109,800	109,800
Technology	158,964		157,125	157,125
Hospitality	21,790		17,790	17,790
Professional Development	89,424		43,485	43,485
PRC 085 - Literacy Intervention	19,650		19,650	19,650
PRC 118	1,000		1,000	1,000
Total Instructional	411,628		348,850	348,850
Copier	45,000		45,000	45,000
Accounting Software Support	5,769		5,769	5,769
Office Supplies / Postage / Bank fees	52,000		52,000	52,000
Dues / Licenses	1,500		2,000	2,000
Sales Tax Expense	33,000		33,000	33,000
Legal Services	15,000		25,000	25,000
Audit Services	26,750		13,500	13,500
Interest Expense	192,400		183,613	183,613
Principal on loan	290,290		299,120	299,120
Marketing	8,333		25,000	25,000
Development	22,000		45,000	45,000
Other Expenses	2,000		2,000	2,000
Total Office and Administrative	694,043		731,002	731,002
Rent	492,000		492,000	492,000
Custodial	104,000		107,431	107,431
Building Repairs and Maintenance	250,000		226,311	226,311
Property and Liability Insurance	69,000		79,000	79,000
Utilities - Electric	55,000		60,000	60,000
Utilities - Gas	2,900		3,000	3,000
Utilities - Water / Trash	37,000		38,000	38,000

Sterling 2025-26 Budget			2025-26 Budget	
Telecommunications	22,500		24,000	24,000
Total Facilities	1,032,400		1,029,741	1,029,741
Snack Expense	11,300		12,000	12,000
Free and Reduced Lunch	6,000		7,000	7,000
Total Food Expense	17,300		19,000	19,000
Surplus Expenditures	263,100		-	-
Total Expenses	9,292,125		9,035,970	9,035,970
Net Income / (Loss)	148,971		217,597	(34,403)
Add: Capitalized Items (previously expensed)	275,538		61,000	61,000
Add: Principal Payments	290,290		299,120	299,120
Less: Depreciation	-		-	-
Less: PL accrual	-		-	-
Change in Net Assets	714,799		577,717	325,717
Add: Interest Expense	192,400		183,613	183,613
Add: Depreciation	-		-	-
Add: Debt Service Reserve (up to \$100K)	-		-	-
Total #1	907,200		761,330	509,330
Current portion of LT debt - prior period	290,290		299,120	299,120
Interest Paid	192,400		183,613	183,613
Total #2	482,691		482,733	482,733
Debt Coverage Ratio-Total #1 / Total #2	1.88		1.58	1.06
Amt of add. income needed for 1.05 DCR	\$ (400,375)		\$ (254,461)	\$ (2,461)



Executive Director LHU Board Report - June 2025

School News

- The 2024-25 school year closed out on June 12th. Summer is now underway and directors are hard at work preparing for next school year. Some of our recent endeavors include preparing a master schedule to be submitted to Infinite Campus that prioritizes time in the day to provide support to students while protecting state-mandated planning time.
- We are also preparing for the upcoming leadership transition, planning for August work week, and exploring what we can offer to current and future families (e.g., summer camp).
- Infinite Campus: data transfer completed 6/20; site is currently in production and will be back up after 6/27. We continue to meet with the team to ensure a smooth transition.
- Polaris has been crucial during this transition; they will continue to support our data needs, as well as assist us in the process of digitizing student files.
- BambooHR: Andrea and I have begun meeting with Austin, our project manager, to get onboarded with this system; once we are ready, AltHR can complete the process of digitizing employee files with us.
- Betty and I met with new potential insurance brokers; it seems we have not had someone active for years. Brian and Eliza from Foundation Risk Partners are excited to help us streamline our benefits and find better rates for us.
- Open positions:
 - UE floater
 - ECPA (2)
 - UE Lead*
- Carrie Smith Teacher Training Fund—discussed at Development meeting and announced at EOY breakfast; we need a process for teachers to request funds.
- Reviewed the marketing proposal, which is in To Be Approved folder. It would also be helpful to have board support in this endeavor, maybe through the Communications committee?
 - As I've said, our efforts need to focus on increasing Academy enrollment. I can bring flyers to local apartment complexes, community center, places of worship, etc. but I need to have flyers first.

Operations

School Enrollment - 2025-2026

Charter - 617

Academy - 79

Total Enrollment - 696

-2	33
-1	46
0	80
1	74
2	80
3	77
4	71
5	71
6	61
7	54
8	48

Offers out -

PreK=4

K= 8

1=2

2=1

3=1

4=3

5 = 0

6 = 7

7 = 1

8 = 0

Exceptional Children

- ESY (extended school year) is running from June 23-July 24 from 8-12:30; 17 enrolled.

Children's House

- Continuing to accept applications for Academy and work on promoting to the local community
- Ongoing academy tours for prospective families

Lower Elementary

- There were 5 3rd graders that have yet to pass the RtA Law.
- 6 students signed up to attend RtA Camp.
- Carroll, Ayomi and Ellie are teaching camp, which runs through July 23.

Upper Elementary

- Liz last day today! We wish her well in her next chapter.

Middle School

- Beautiful Graduation ceremony held on June 11th; board members and community encouraged to attend and witness the appeal not only of the middle school program, but also.
- Justin's last day was Tuesday; he starts with AMS next week. Good luck, Justin!

Policy Committee

June 5, 2025 Meeting:

Attendance and Call to Order

Virtual via Google Meets

Chair: Kevin Hughes

Board Members: Daphne Coulter

Others: Elizabeth Uzzell, Joanne Amazan

The meeting was called to order at 12:00pm.

Agenda

- Financial Aid for CH
- CH Lottery Preference
- Development—Travel Aid

Discussion Items:

Financial Aid

- Following up on BOD vote to provide up to 2 students' worth of CH scholarship, Kevin asked what process we may have to "qualify" a family for eligibility for assistance.
- We have FRL qualification today. Is it possible to use that process, or is that not possible until a child reaches K?
- We also offer field trip assistance in charter. Can we use that process?
- Is it possible for the state to qualify someone?
- Elizabeth will think about what process we can use, and how we might allocate that assistance. We may have objective criteria, and then have lottery for assistance?
- Elizabeth also mentioned her long term goal of moving towards a sliding scale for tuition. This will obviously need to ensure we have enough FA to spread around as needed.
- Possibility of asking CH families if they are willing to pay more for scholarships. We can also fundraise specifically for this.



Lottery

- Discussion of what BOD authorized. Why was this set at 15 spots? Can it be higher?
- Can we make this a sliding number based on other lottery preferences (e.g. target 40 preference spots, and if fewer other preferences are admitted, use those extra spots for CH?)
- Explained that BOD initiated this because it was raised as a possibility in policy committee, but then admin did not follow up for 2 more months, and numbers of CH enrollment made BOD feel additional incentive was warranted.
- Admin welcome to propose change, but any change will have to go to BOD

Development funds/Travel Aid

- School pays tuition assistance but does not generally fund travel for the teachers. This can be a very big expense (e.g. Boston).
- Can we create a fund for teacher travel aid? If we do that, does this negatively impact other fundraising?
- Transfer this agenda item to Development

June Meeting Agenda Items

- Any recommended changes to handbooks from HR/policy audit?
- Any new policy proposals from Elizabeth?

Closure and Next Steps:

- Next meeting scheduled for July 3, 2025 at 12:00 (Should this be moved?)

Recommended Board Action

- None

Meeting was adjourned at 12:58 pm.



Sterling Montessori

Web Strategy, Design, + Development

NOTICE: This proposal is confidential. Please do not share, reproduce, publish or distribute to any third parties without the express prior, written consent of Chariot Creative, Inc. All information contained herein and provided by Chariot Creative, Inc. is considered confidential and proprietary.



INFORMED STRATEGY + HONEST COLLABORATION

Dear Stephanie,

I enjoyed meeting with you and Fay last week! We are VERY excited, to say the least. I hope this excitement shows in the time we've put into the rough Recommendations & Plan on the pages below. We'd love to be a long-term partner for you all at Sterling, like we are to the vast majority of our clients.

For more than 16 years, we have used strategic design and development to compel users and empower clients. We combine audience data, our research, user psychology, and your goals to build an intuitive user experience (UX). Then we bring it to life using clean, secure web development that leverages the latest coding and technology in the industry.

Here are some quick points about us:

- **Strategic UX design and clean implementation are in our DNA.** *We mix science, psychology, research, trends, and goals to build compelling experiences for users.*
- **We custom-build clean, secure websites.** *No templates. Clean, secure, stable code. Custom, from-scratch front-end builds. We provide complete admin training as well.*
- **We are wizards of integration.** *With hand-coded software development in our wheelhouse, we build some of the most complex but solid integrations in the industry.*
- **Content Strategy is the best ingredient.** *We carefully develop content that leverages your brand's voice with SEO efforts — content for humans and Google, alike.*
- **We measure results across all channels.** *We can track conversions and engagement from paid ads, social, CRMs, etc. We use data from one channel to inform the other.*
- **Collaboration + transparency are our cornerstones.** *We are a dependable, long-term resource for you, and we are excited to learn more about your organization.*

OUR TEAM



Jason
President



Sam
Sr Project Manager



Nicole
Project Coordinator



Anthony
Sr Full Stack Developer



Alan
Sr Designer



Ben
Full Stack Dev, Data Strategist



Cameron
Front End Developer



Shanks
Designer



Siobhan
PPC Manager

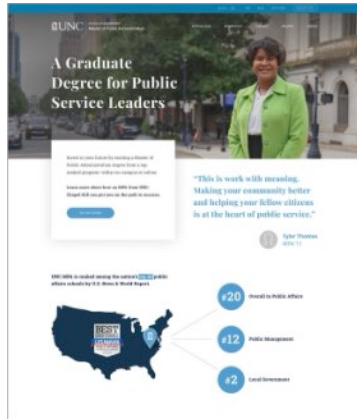


Jenna
Content Strategist + Copywriter



Abbie
VP

OUR WORK

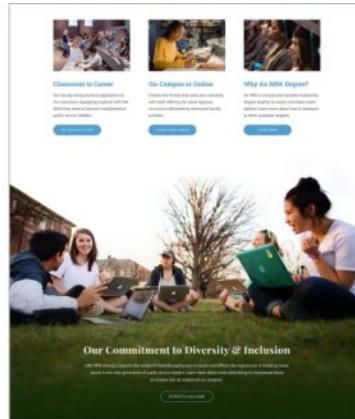


UNC Chapel Hill, School of Government

Chapel Hill, NC

- Research, Discovery, Content Strategy, Journey Map
- Web Design & Development
- Custom Course & Student Events System
- Student / Alumni System with Dynamic Feeds
- Custom animations, infographics, and more

[See Case Study >](#)



NC Museum of Natural Sciences

Raleigh, NC

- Logo + Branding Refresh
- Research & Discovery + UX Planning
- Web Design & Development
- Location Map with Synced Data
- Request System, Upload + Approval System
- Custom animations, and more

<http://takeachildoutside.org/>

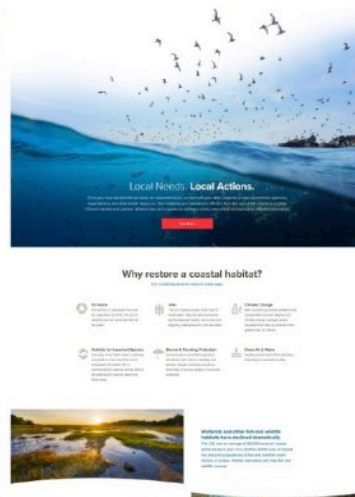


Coastal Restoration Toolkit (NOAA)

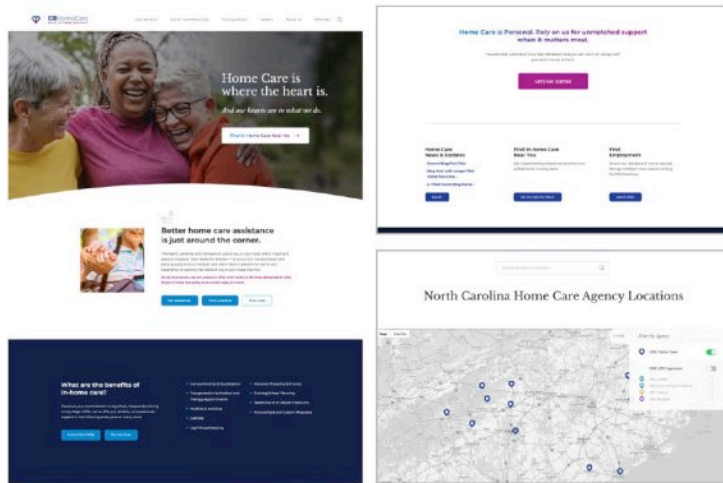
Washington, DC | Seattle, WA

Chariot was chosen to work with NOAA (National Oceanic & Atmospheric Association) and Restore America's Estuaries (RAE) to build the all new Coastal Restoration Toolkit. Chariot was invited to speak at the Coastal and Estuarine Summit in Long Beach, CA, where we revealed the new design. We also helped host the first of three focus group sessions across the US that took place in Washington. Today, we continue to work with RAE and NOAA.

<https://restoreyourcoast.org>



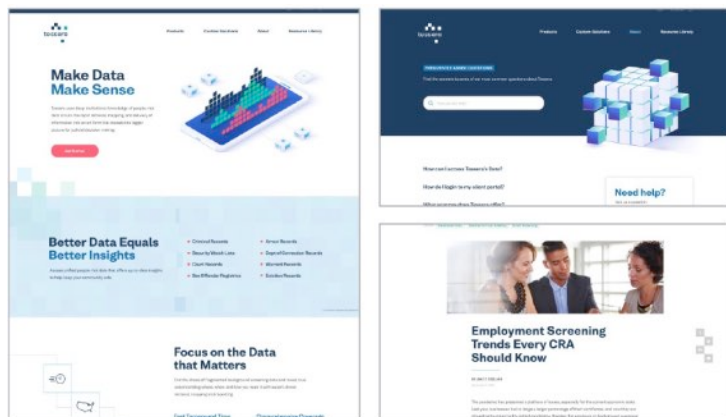
OUR WORK



CB Home Care

Charlotte, NC

- Logo Design + Branding
- Research & Discovery + UX Planning
- Web Design & Development
- Location Map with Synced Data
- Email platform integration
- Custom Employee Portal / Dashboard



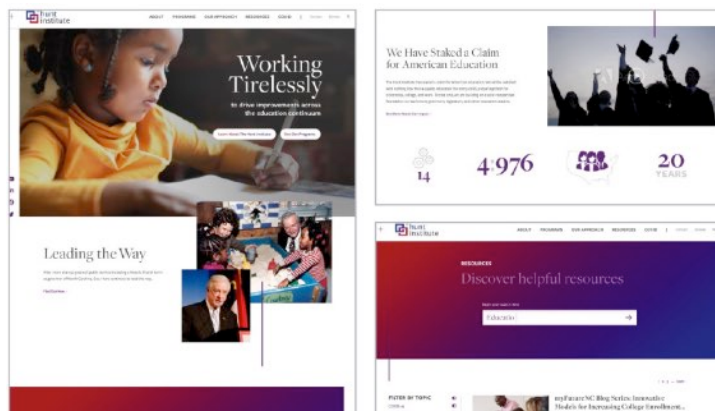
Tessera Data

Irvine, CA

B2B data and risk mitigation company.

- Research & Discovery + UX Planning
- Web Design & Development
- Interactive FAQ
- Custom Animations • Mobile Content Strategy

<https://tesseradata.com>



The Hunt Institute

Durham, NC

National nonprofit for education reform.

- Research & Discovery
- UX Planning + Content Strategy
- Web Design & Development
- Resources System with Predictive Search

<https://hunt-institute.org/>

REFERENCES



Elsa Schwartz

*Senior Director of Restoration and Administration,
Restore America's Estuaries - Washington*

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360-926-8814



Bill O'Neil

*Director of Outreach and Communications,
Center for Personalized Education for Physicians*

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919-622-9846



Abby Prato

*Vice President, ATD Detailing, Inc.
Raleigh, NC*

abby@atddetailingnc.com
919-760-6420

"Chariot has been a wonderful company to work with... they provided a clear plan at a reasonable price point. They were very responsive to any recommendations or requests that we made. They were professional and stuck to the project timeline. We definitely got our money's worth!"

- J Thompson | Owner of Horizon Performance, LLC

"Creative, patient, professional and reliable. Overall, great design and great customer service delivered."

- FB | Ralph Lauren

"We have used Chariot Creative at our firm for many years. I am always pleased with the quality of the work, value, and turn around time. We will remain long term clients."

- Ben Whitley | Whitley Law Firm

OUR RECOMMENDED PLAN

Below are our recommendations for Sterling Montessori, in order of efficacy. Of course, the scope and extent of these next steps are somewhat depend on budget and further discussions with you all, but we hope this can serve as a first draft of The Plan to refresh Sterling's online presence, increase enrollment, and increase overall engagement.

Website

Design Approach:

- Fresh, Clean, Engaging Design / UX (user experience)
- Energetic, but Professional
- Fun, but Structured
- Compelling, but Educational
- Two-way User Intention Split: Montessori Education vs Sterling USPs (unique selling proposition)
- Responsive Design/Dev (+ Reactive content) to ensure perfect UX on mobile devices
- Leverage lively images of kids doing school activities unique to Montessori
- Intimate images showing moments of learning. Limit photos to 2-3 subjects max, if poss.
- Limit the Departure from the current Sterling brand visuals (colors, fonts, etc.) to not alienate current families, board members, etc. familiar with the current branding.
- Push What Makes Sterling Unique among Local Competing Schools
- Offer Easy, 1-step access to Resource Library for parents to find info from Lottery to MySchoolBucks, etc.
- Design should Pull Users to Calls to Action, Peripheral & Relevant Content, and Continued Navigation

Website Architecture:

- Re-work the Sitemap based on Discovery, Staff input, and User Metrics
- User Journey Mapping should identify and resolve bottlenecks per user
- Merge & Move Pages based on usership and alignment with goals
- Plan for Strategic Cross-Linking and Multiple Access Points
- Intuitive, Easy, Visual Menu Navigation
- Structured hierarchy layout in Nav Dropdown with Visual Queues
- Built Pages that align with Google Grant Ads Strategy (Lead Pages)

Web Technical:

- Resources Library with taxonomies; allows users to filter by category, form, type, etc.
- “Smart Search” feature for Resources, Forms, Info, etc.
- Integrate ParentSquare Data Feeds into website (Fresh communications, weather, announcements, etc.)
- Centralize documents into the website where possible (vs G Drive, other drives).
- Calendar System possibly integrated with ParentSquare and/or PowerSchool, TBD
- Robust FAQ System with its own Smart Search (possibly feature on homepage)
- Include Email Sign-up with possible Value Proposition + data tags (interests options)
- Implement Custom Conversion Tracking to measure user behavior
- More user-friendly Directory with quick-find features; perhaps digital rolodex-style links (can show examples of past sites we've done with this feature)
- Live Data Dashboard for Chariot/Sterling to check Site Analytics at any time
- Quick Elements for Parents? Fee Calculator, Eligibility Lists, Quick-Find Forms, etc.

Copywriting + Content

- Establish New Content Silos, and work into Site Mapping
- Curate Messaging with Focus on User
- Compelling Headlines that Drive the Mission
- Establish a Brand Voice that Connects to Families/Parents (somewhat based on Discovery and Research on Target Audience)
- Format Copy for Rhythm of Web UX for Best Engagement
- Include a Strong SEO Strategy to Continually grow organic rank

Google Grant Ads Management

- Use Grant campaigns to drive engagement + enrollment
- Focus on pages most likely to convert
- Include KW Research to kick start best performing ad copy
- Divide budget into Separate Campaigns based on Popularity + Goals (Montessori Ed vs Sterling USP)
- Measure, Monitor, and Adjust
- Maintain CTR and spend as much of 10k budget as possible
- Include Geo-targeting and Display with Additional Paid Ads Budget if possible

Blog Content

- Recommended 1-2 blog posts per month
- Include KW Research for Strategic Topic Ideation
- Copywriting to match Brand Voice
- Topics to Include Both Approaches for Split: Montessori Values vs Sterling
- Templates/Campaigns to include: Montessori Ed, School Announcements, Classroom Successes, Parent/Child Success Stories, What's New, General Charter School Tips
- Blogs to include "Share" and "Print" options
- Blogs to be shared on Social and Featured in Email Campaigns each month.

Email Marketing

- Fun, Concise, Branded Campaigns that match the new website
- Utilize incoming Sign-ups (and interest data) to Segment Subscribers
- Plan for Tailored Emails based on interest groups
- Build multiple Templates for Easy Campaign Creationg & Send-outs
- Plan to point all traffic to website for resources, info, contact, etc.
- Measure Open & Click Rates, adjust as needed, capitalize on what's working

Social Media

* SM Management best done by Sterling staff, but Chariot offers close consulting on strategy & tactics.

- Identify the strongest platforms + audiences
- Posts to lead users to the website (Blogs, Info, FAQs, Stories)
- Encourage engagement when possible (Questions, Polls, Opinions, etc.)
- Consistent Brand Visuals + Voice (image choices, captions)
- Include hashtag research and partnerships to cross-pollinate audiences (connecting Early childhood professionals, tagging other organizations, peripheral hashtags, etc.)
- Schedule for optimized posting times based on the target audience (families/parents)

Ongoing Improvements

- Plan for ongoing improvements to website based on user metrics and staff requests
- Add New Web Pages or Edit Current Page Content based on Site Analytics (Bounce rate, Exit Points, User Path Metrics, Mobile Usage Metrics vs Desktop, Landing Pages, etc.)
- Maintain Website Hosting + Security to ensure no loss of data or hacking. Backups, Uptime monitoring, Spam Checks, Broken Links, Extension & Plugin Updates, etc.
- Periodic Audits of Email Marketing + Subscriber Lists. Find new ways to utilize variable data, interest groups, more focused messaging, etc.
- Consistent Topic Research and Analytics Monitoring of Blog Posts Engagement. Adjust as needed on focus, topics, and local SEO signals.

SCOPE OF WORK

Discovery

First, we listen. In this kick-off phase we review your goals, the scope of work, your vision, as well as challenges inside and outside of your organization. Our Discovery process involves us gathering in-depth input from you and your team, then digging into your current standing and mapping out the road ahead. We also review aspects of your website, web traffic/analytics, digital marketing (paid and unpaid), website experience and functionality challenges (front and back-end), work flow, admin challenges, resources, and more.

Sitemap

Next, we work with you to create an efficient sitemap or site plan that will serve as a guide to the page hierarchy of the website, the menu system, internal link mapping, and how pages correlate to each other. This deliverable will include visual representations, in line & block form, that map out the main, public-facing website pages via the main navigation menu(s).

Website Design

Next, based on the previously approved planning phases, we create and present full-color, static image prototypes (mock-ups) of **12 unique web page designs**. These Design mock-ups will be high-definition prototypes showing navigation, interactive elements, and planned scroll and/or animation effects. The designs may include additional prototypes of the secondary website page(s), listings/search pages, pop-ups, and more. This phase includes up to 2 revisions of each website page design (3 versions total).

Website Development

After designs are approved, we will proceed with development per the following scope. For any pages to be developed that were not included in the Design phase, we will follow the established look and feel for the best way to present the content on those pages.

Website Pages: Development of up to approximately **50 total web content pages**. This will house all public page content displayed on the current website, including any further content created during this project. Some pages may be combined and/or moved during the site mapping process.

***** NOTE:** Current site has approximately 70 pages in main navigation. Here, we've allotted for 50 total pages with the plan to convert approximately 20 pages into Resource Assets. For example, Forms & Documents, Readiness Checklists, Policies & Laws, Handbooks, etc.

Mobile-Responsive Design and Development: The new website is to be compatible and responsive to all modern browsers and mobile devices.

Complete Site Navigation: Tiered, configurable website navigation system that includes multiple tiered levels as needed. UX for large menus will be curated on mobile devices.

Content Management System: We build website frameworks from scratch using clean, custom coding while utilizing an especially customized WordPress platform for the admin access and functionality. Any non-technical user will be able to login and make content edits at any time. See below for the training that we include.

User Management: The website admin (you, the client) can add/edit/delete additional user accounts for anyone (employee) regarding the website admin dashboard. Individual user accounts can have varied accessibility / power. E.g. Admin, Manager, Editor, Subscriber, etc.

Contact Form: In-site contact form with variety of options on form fields. Includes auto-responses to sender, admin email push notifications, and all submissions saved in website admin dashboard for client access, tracking, and export.

Resources/News System:

- Custom-built resource system that will include a repository of documents, files, articles, video and audio content categorized by source, topic, type, or category.
- Users can quickly filter by type, source, topic, or audience to find what they need.
- Client and/or system users will be able to upload, post, and categorize Resources that will immediately be added to the system.
- Includes a smart-search function that will display auto-suggested results (auto-complete / predictive search) technology that will pull & display data found within the Resources content as a user begins to type. This logic can cross-pull from a variety of data points. E.g. type, topic, and source, simultaneously.

Events Calendar System

- Includes an Events System that houses and displays client-entered event listings in multiple formats: List, Calendar grid, pre-filtered card displays.
- Events can be categorized based on client-chosen taxonomies.
- Users can filter events on the public website based on categories.
- Includes an Event Detail Page with venue data, description, image, image gallery, Google map auto-display, date & time ranges, links, and CTA buttons.
- Events page feed integration includes the ability to add active feeds on content pages that display upcoming events relevant to that page's content. Filtering can be configured by the client in the website Admin based on categories, locations, or other taxonomies.

Email Sign-Up Integration: Includes API connection on the new website for sign-up forms that feed to subscriber data into your company's email marketing platform of choice. *For email marketing, we recommend Active Campaign, MailChimp, Constant Contact, and others. *We can discuss options to add on email design & development, list segmentation, email template set up, etc.*

Security: We will include multiple levels of security at the site level that include two-factor authentication (2FA), forced strong passwords, login bot protection, external IP blacklisting, blog comment security/lockdown, core files protection, and more. If website is to be hosted by Chariot as well, we include redundant backups (G-cloud + AWS), free site restoration if needed, patch management, injection attack protection, change logs, user access logs, malicious file monitoring, uptime monitoring, and more. (See hosting & maintenance below.)

Stock Media: Up to two (2) licensed stock images are included PER unique page design [see Web Design phase], with a price cap of \$15 per image. Chariot's normal sources for stock media include, but are not limited to, Adobe stock, iStock, and Shutterstock. Upon project completion, the client will receive high-resolution versions of all purchased stock for future marketing efforts. For additionally-billed stock media, Chariot will get client pre-approval before purchasing media on behalf of client.

Staging Site Review

We will provide you with a "staging" link to a complete, live version of the new website. You will be able to review and test all functionality of the new website before providing approval to launch.

Optional Pre-launch Website Updating Period

If the new “staging” website requires client content updates prior to the official launch, we provide an optional 5 business day grace period for those updates to be made by the client, using the provided training instruction. After this period, server hosting fees will begin to incur. For example, in cases where new blog posts have been written or updates have been made to the current/old website while the new site was being built. Alternatively, Chariot can make these content updates at our standard hourly rate.

PROJECT OPTIONS:

Website Hosting + Monthly Security & Maintenance

Enterprise-level hosting on of our dedicated servers on Google Cloud Platform. Inclusions:

- Dedicated low-traffic server on Google Cloud Platform
- Free SSL; domain-validated with encryption, automatic yearly renewals.
- CDN: We utilize a Content Delivery Network (CDN) that is a group of geographically distributed servers that speeds up your website and stops malicious attacks (such as DDos) before they even reach your website.
- Nightly backups of website files and databases with 30+ days retention and free site restoration if needed. We utilize BOTH of the largest servers in the world: Google Cloud will host your active site, with backups stored on Amazon Web Services (AWS) servers.
- Up to 5GB Storage; No bandwidth overage charges
- Direct client SFTP and Dashboard access if needed
- Technical Support - Real Humans
- Hosting does not include email. We recommend Google Workspace, Microsoft 365, or Barracuda (etc.) for secure email hosting / MX servers. Chariot can set up DNS for client-selected and paid for email services.

The monthly security and maintenance include:

- Chariot analyzing your website each month and updating the site's code.
- Chariot will update any extensions, PHP or MySQL database technology to the latest versions, and patch any known security vulnerabilities against known attacks.
- A Website Technical Report will be sent to you each month showing website up-time, all updates made, security, backups status, and more in the past 30 days.
- [See an example of our Technical Website Report here >>](#)

WCAG Accessibility Optimization + Guarantee (*Optional*)

As an optional add-on to this project, we offer a WCAG Accessibility service that includes an accessibility audit of the final deliverable website, along with our Accessibility Guarantee. This guarantee will apply to the material we develop in this project in its form upon completion or launch. The Accessibility Guarantee means that on final delivery, we will ensure no “errors” (shown in red) according to the Web Accessibility Evaluation Tool (WAVE) found at wave.webaim.org. In addition, we will work to address any “alerts” (shown in orange) or other suggestions on the WAVE checker tool during our final pre-launch QA, but can not guarantee to resolve all flags beyond those marked as “errors.” At the time of launch, if the material we provide shows “errors” on the WAVE tool, we will fix such errors as quickly as possible so as not to delay launch. *See more details about our Accessibility Guarantee in our terms and conditions.*

Accessibility Widget (Add-on for Web Hosting)



IF you've chosen to host your website with us, this option includes a managed (always kept up-to-date) Accessibility Widget offering visual options, screen reader functions, and more. This ensures that your website remains up-to-date with latest WCAG and 508 standards despite new and rotating content.

Logo Design + Brand Guide

Logo Design + Brand Guide

Chariot Creative will conceptualize, design, revise, and finalize logo/branding concepts. We will include prototypes / mockups of how logo concepts can be implemented across marketing channels and on printed materials. Scope includes 3-5 initial logo/branding concepts, with up to 2 revisions of chosen concept (3 versions total); however, revision count can be flexible. Our focus is to finalize a brand that serves its purpose to your target audience and potential customers or donors, and one that you and your team really love.

Final files will include a Brand Guide PDF that will serve as a benchmark for your brand's elements (logo usage, color palette, fonts, spacing, and usage examples) along with all versions of the logo files ready for use in any application, including corporate branding and promotional materials (native, vector, and/or bitmap files).

SEO Research + Technical On-Page SEO

We recommend keyword research before creating a sitemap or getting started on the design. Basing a website's UX (user experience) on actual data is always better than guessing at what your audience is looking for. This data can be used as a guide for your messaging (what to say), tone of voice (how to say it), along with discovering and prioritizing topics to focus on. It is a simple matter of ROI, and it will maximize traffic, decrease bounce rates, and increase conversions.

This phase includes research of currently targeted keywords in regards to search volume, competition study, and ranking difficulty. We use this data and discovery of any suggested alternate keywords to create a Keyword Portfolio. This portfolio serves as a guide for efforts to maximize search visibility and search-focused content, as well as a guide to any technical, on-page SEO we build into your website just before and after launch.

- SEO Crawl & Keyword Implementation - includes cross-referencing research findings to target search terms with the highest conversion and best opportunity
- Site crawl and robots.txt review with updates
- Indexation: XML sitemap creation
- Submission to Google Search Console
- Site Speed Testing and Optimization (desktop and mobile) Keyword-to-Page Mapping
- Page Titles, Meta Descriptions, H1, H2, and Image Alts
- Duplicate / thin content identification
- Schema markup audit and optimization
- Verification of mobile compliance via Google

Google Analytics (GA4) Integration Set-up

Includes creating a new Data Stream as needed and implementing a new or pre-existing GA tracking code into your new website in order to track website traffic. Does not include custom conversions (behavior triggers) or reports. This is a one-time set-up.

Copywriting

Copywriting includes our content strategist and writer(s) using provided materials such as outlines, lists, online resources, presentations, or pre-existing web content to write clean, proofed, and SEO-focused copy to be used on the new website. All copy would be pre-approved by you, the client, before being put into production and implemented into the website.

Copywriting includes review call/meeting of client-provided outlines, target audience, tone of voice (brand voice), headlines, and overall content strategy as it correlates to sitemap and UX. Includes up to 600 words per page (average pages are 200-500 words per page), and up to 2 revisions of each page (3 versions total).

--- OR ----

Copy Review + Optimization

(As an alternative to Copywriting) For clients who already have page copy but may need to review and optimize it for audience engagement, better brand voice, and/or SEO.

- Review of client-provided copy for website page content
- Optimize for user engagement, tone of voice, SEO focus, + supporting graphic placement.
- Includes review call/meeting of target audience, headlines, + overall content strategy
- Includes 1 sets of revisions per page (2 versions of optimized copy, total)

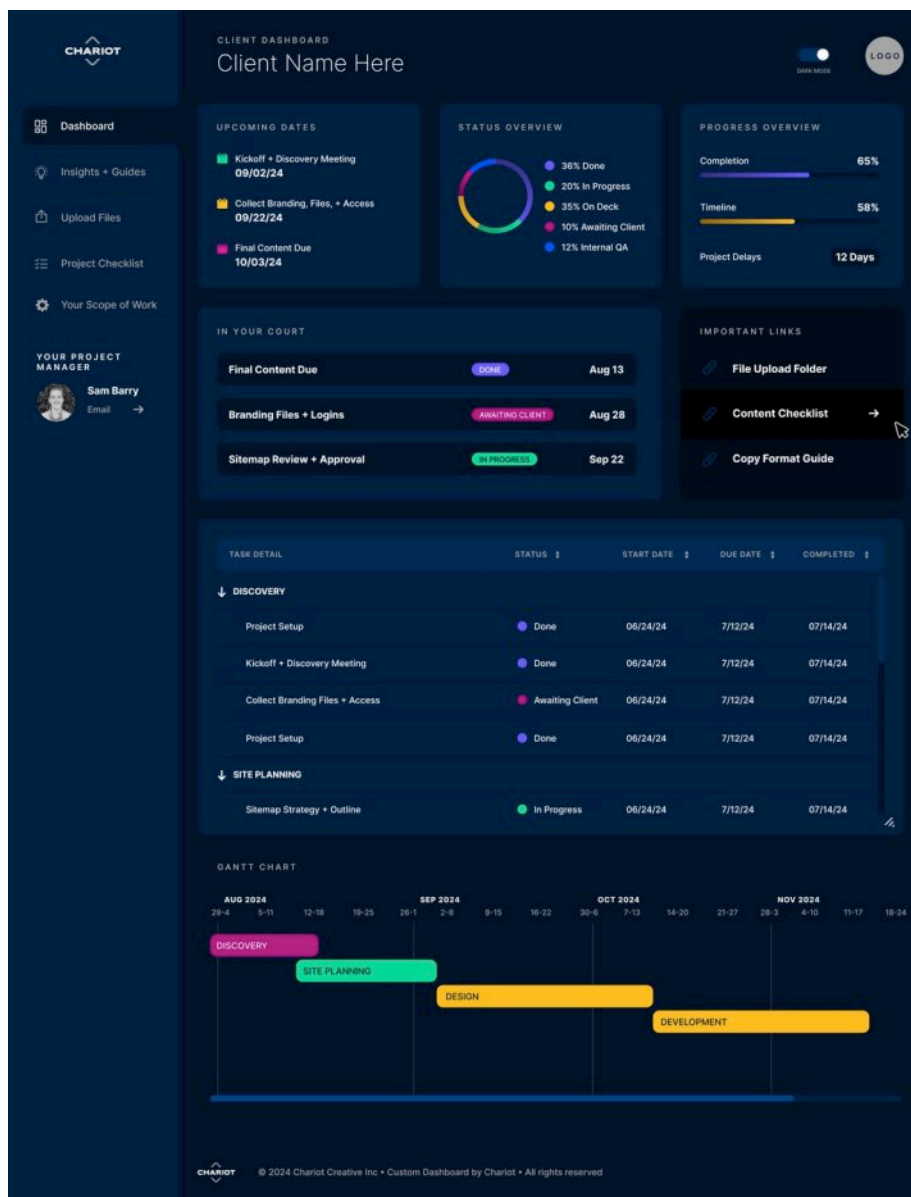
ESTIMATED TIMELINE

WEBSITE PHASE / DELIVERABLE	DURATION
Kickoff + Discovery	1 week
Sitemap	1-2 weeks
Web Design	3-4 weeks
Web Development	6 weeks
Technical On-Page SEO	1 week
QA, Revisions, + Launch	1-2 weeks

The above timelines are estimated, based on scope inclusions, and partially based on client response time regarding feedback and approvals. Chariot normally requires a 2-8 week lead time before work can begin, depending on pipeline of current client work at the time of signing. Please let us know if there are any must-have milestones or hard deadlines for the project — we can be somewhat flexible and work to meet deadlines as needed.

YOUR CLIENT DASHBOARD

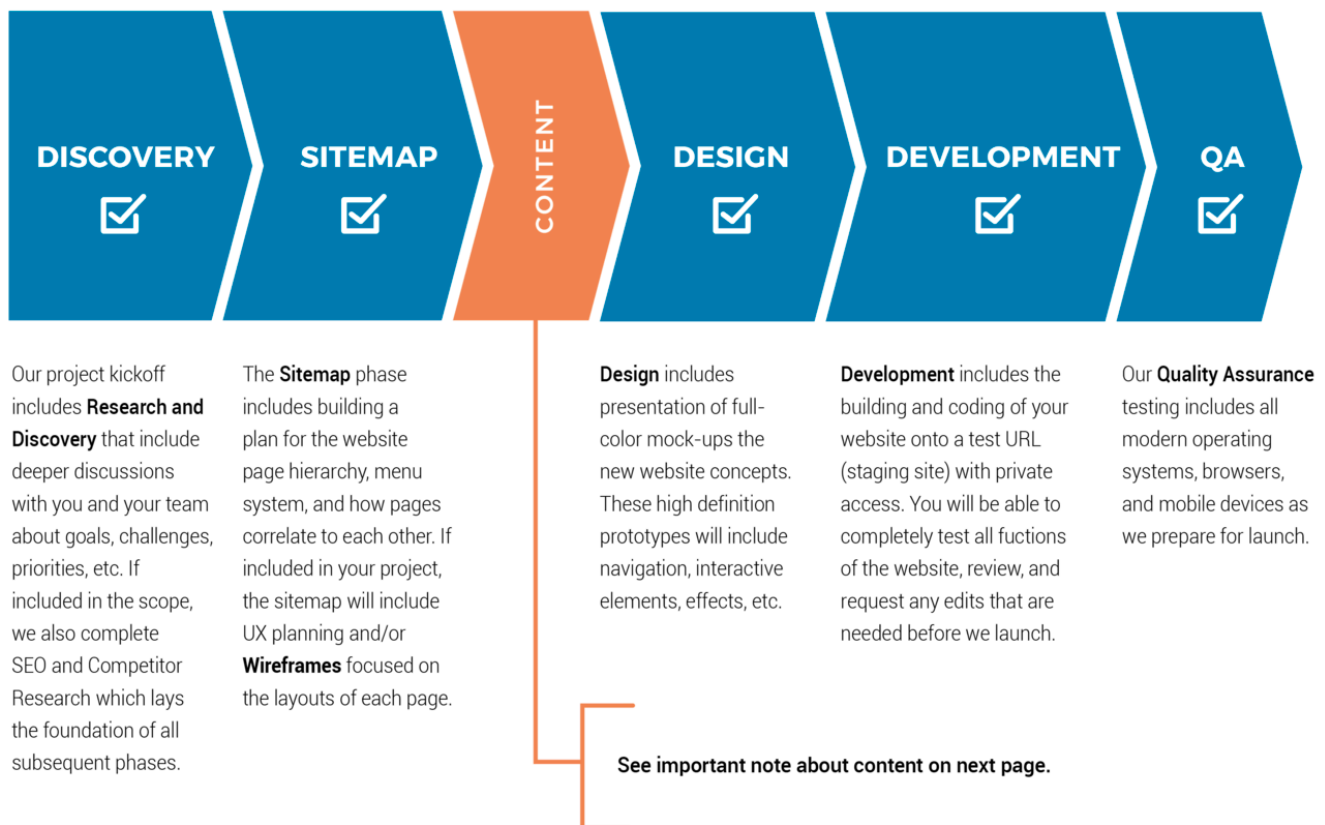
You'll never be in the dark — Once your project begins, our project manager will provide a link to your very own Client Dashboard where you can visually track the progress of each phase and milestone of your project.



THE PROCESS

Website Build: Phases & Foundations

Our website creation process includes tackling your project as a set of chronological phases, not unlike the construction of a building. The foundation has to be solid, and it's very hard to go back and change the foundation after the walls are built. Each project phase provides a foundation for the next. Therefore, **all decision makers, or stakeholders, need to FULLY APPROVE each phase before moving onto the next phase.** Once a phase has been approved and closed, client requests to revert back and make a change to a previous phase will likely to be treated as additional, billable work. *The basic phases of the website build are as follows:*



CONTENT REQUIREMENTS

What is Content?

Content is anything that is specific to your business, messaging, or data that will need to appear on your website or on any of your material. Content includes:

- Text (copy)
- Photos, Videos, Graphics, Infographics, or other Media
- Downloadable Files & Documents

Text Content Requirements

If your project does not include Copywriting or Content Optimization services with us, we will need the copy supplied to us per the following requirements:

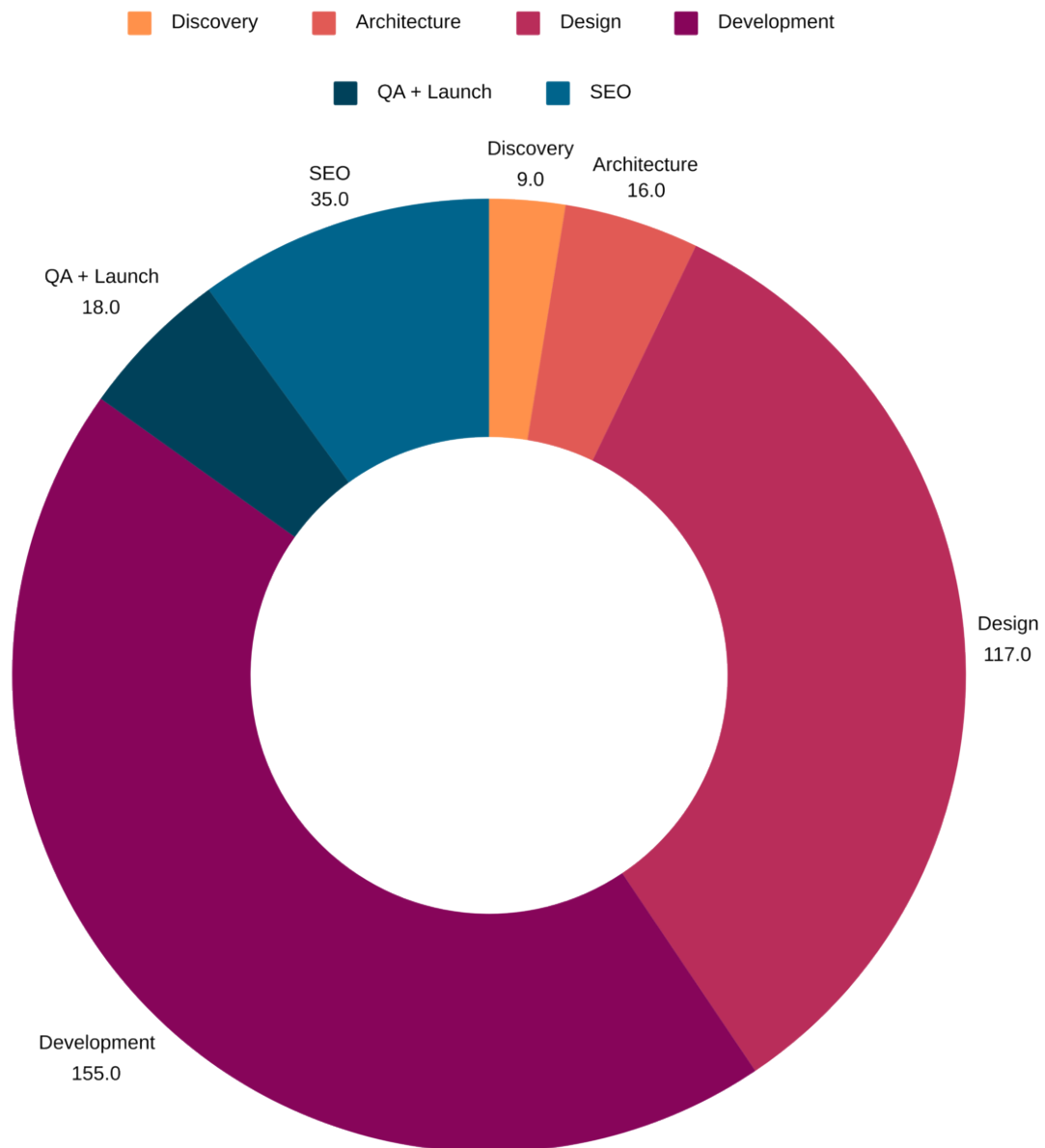
All copy supplied to Chariot should be:

- In a copy-and-pastable format (shared doc, word doc, or website page)
- Proofed for spelling and grammatical mistakes
- In its final format, pre-approved by all stakeholders
- Provided before the start of the Design phase of the project (*see previous page*)
- In standard web page format including heading and sub-heading tags, inline links as active links, bullet lists, etc.
 - Specific elements should be noted such as button label text, pull quotes, important text or callouts, etc. *We can supply a general web copy template.*

After the copy is provided, any copy revisions needed will be considered additional, billable work (separate Estimate required), and the project timeline will need to be adjusted to compensate. Changes in copy after it has been implemented into the Designs may also result in additional, billable work to cover extra time editing design prototypes or website coding.

PROJECT BREAKDOWN

Your project's breakdown of work, by hour.



FEE SUMMARY

Description	Price	Qty	Subtotal
Planning, Web Design, Development, QA, Launch Discovery + Setup: 9 hours Site Architecture, Sitemap, User Journey: 16 hours Design: 117 hours (12 Unique Pages) Development: 155 hours (50 Total Pages, Resources System, Calendar, etc.) QA + Launch: 18 hours ----- TOTAL Estimate: 315 hours			\$59,040
SEO Research + On-Page & Technical SEO Research, Reporting, + Technical SEO for 50 Pages			\$6,300
Copywriting TBD, Will Evaluate After Site Mapping			\$0
Quarterly, Post-Launch Strategy Sessions — 4 Calls			\$1,600
<input type="checkbox"/> Logo Refresh / Design Refreshed logo design based closely on the current logo + colors.			\$3,600
<input type="checkbox"/> Brand Guide Complete 8-10 page guide showing logo usage, color palette, fonts, spacing, etc.			\$2,200
<input type="checkbox"/> Google Analytics Integration + Custom Conversion + Data Dashboard Tracking website traffic, user behavior, engagement, etc.			\$3,000
Email Marketing (2 Campaigns per month) Copywriting, Subscriber Management/Segmentation, Send, Tracking			\$1,650 /month
Google Grant Ads Management			\$950/month
Web Hosting, Security, + Maintenance	\$230/Month	1	\$230/Month
TOTAL PER MONTH			\$2,830
TOTAL			\$66,940

PAYMENT, TERMS, + CONDITIONS

Project Total Cost: \$66,940.00

Monthly Total: \$2,830.00

This total project cost is based on the scope of work listed in this agreement. Additional work or requests beyond the scope of work listed in this agreement is to be quoted to the client and approved by the client separate of this agreement, one an as-needed basis.

The above price is effective for 30 days. A 40% deposit of the total project price is due upon Proposal / Contract acceptance. Chariot Creative, Inc. will then bill according to the Payment Schedule (shown below) with net 15 terms for each payment. The initial down payment is non-refundable. Ongoing services can be billed monthly, quarterly, or annually.

Tiered Payment Schedule:

- 40% down payment will be invoiced upon proposal agreement acceptance and for Chariot Creative, Inc. to begin work
- 30% to be invoiced upon CLIENT's approval of Web Design phase, *before* Web Development phase begins
- 30% (final) due upon website completion and launch of website, or delivery of all services and files set forth in the Scope of Work section of this Proposal

 INITIALS
Stephanie Deming

Terms & Conditions:

DUE DATES:

Chariot Creative, Inc. will make every effort to meet agreed upon due date fulfilling the Scope of Work (SoW) in this agreement. The CLIENT should be aware that failure to submit required information, materials, or payment may cause subsequent delays in the production.

PROJECT DELAYS

Each party agrees to take commercially reasonable efforts to avoid delaying the provision of the services under this SoW. CLIENT acknowledges that Chariot's timely performance of services depend on CLIENT's cooperation by, among other things, attending periodic calls or meetings, providing agreed-to content (final text and/or images), providing prompt and sufficient answers to Chariot's questions, and prompt review/ approval of intermediate work product.

CLIENT may request to pause the project due to unforeseen circumstances, but if a delay caused by the Client exceeds 6 weeks (42 days), Chariot may invoice for all work completed to date. Upon resuming work at a later date, once Client is ready, Chariot will be as flexible as possible, however Chariot will need to reschedule the continued work based upon availability amongst other ongoing client projects.

Launch Delays and Hosting: Once the staging site has been provided and all prior parts of this scope have been completed by Chariot, if a launch delay caused by the Client exceeds 4 weeks (28 days), Chariot may invoice for monthly hosting and maintenance fees (\$300 per month) to compensate for server bandwidth and storage costs.

FEES & ADDITIONAL SERVICES:

Changes in CLIENT input, any additional work beyond the SoW in this agreement, including excessive changes, may be charged at the current Chariot hourly rate for that service. Please contact us for our hourly rate sheet. Any work the CLIENT wishes Chariot Creative, Inc. to create, which was not originally agreed upon will be considered additional. Such Work will require a separate Agreement or signed Estimate and shall require payment above and beyond that specified in this Agreement.

Website Copy / Content Edits:

If no copywriting services are to be provided by Chariot for this project, the Client agrees to supply final, pre-approved text to be used in the website prior to the start of the Web Design phase in order to not cause project delays. Further, new requests for Chariot to edit website copy after the approval of the Web Design phase are not included in design or development “revisions” and will be billed hourly with a 1-hour minimum. “Copy” refers to all text meant for the website including pages, posts, menus, resources/assets, form fields, confirmation messages, disclaimers, etc. Additional copy revisions during the project may also require the project timeline to be extended. Chariot will remain transparent, communicate any delays as they are known, collaborate closely with the Client on deadlines and get approval on all additional work.

Copywriting, proofing, or content strategy services are available upon request. They will need to be quoted and approved separately by the Client, and these additional services will need to be accounted for in the project timeline if they are added mid-project.

Post-Launch Support for Websites

For a period of 30 days after website launch, or after completion of the scope of work (in scenarios where Client chooses to not launch the site immediately), Chariot agrees to offer support for any website “fixes” or “repairs” that are needed free of charge. This support does not include newly requested functionality or work that is beyond the scope of work in this agreement. After 30 days, for any website update requests, Chariot will provide an Estimate outside and in addition to this agreement. If the Client chooses Chariot web hosting & security, the scope of support for that agreement applies — see *Web Hosting Terms* below.

Credentials, Access, APIs, and Data:

The Client agrees to provide ALL needed credentials, account access, data, and data connections (API) prior to the beginning of the Web Development phase. For example, needed assets include: hosting logins, third-party app integrations, Social Media links, Google Analytics access or tracking codes, Email Marketing access, API documentation, and any data, files, or assets needed to import into the new website.

Data Formatting:

Data should be provided to Chariot in its final, approved form and in the format needed. I.e. Excel (XLS or XLSX) or Comma Delimited Value file (CSV), with all appropriate data cells. Chariot can provide an example file as a guide. If any “clean up” or data reformatting is required, that will be estimated, approved, and billed for in addition to the cost and SoW in this agreement.

LATE PAYMENT:

If payments are not made by the due date, there is a late fee of 5% of that invoice. Afterward, an additional fee of 5% may be added for every additional net period that the invoice is not paid in full. The client may request alternate payment terms prior to starting work.

RESERVATION OF RIGHTS:

Deliverables and final published work provided to the CLIENT by Chariot Creative, Inc. in their final form will remain the sole property of the CLIENT to use only as intended per this agreement. However, unfinished work, unapproved (not final) versions, native files, and/or internal notes and processes created by Chariot will remain the property of Chariot Creative, Inc. Any work, information, or materials belonging to the CLIENT, including names, logos, phrases, and descriptions, will remain the property of the CLIENT at the completion of the project as well.

Work Product

“Work Product” means all works of authorship produced by Chariot in its performance of the SoW including, but not limited to, those items that are described as “Deliverables” under the SoW, and “Final Deliverables” means the final versions of such Deliverables intended by Chariot to be the completed work product under the SoW.

Rights to Work Product

Chariot shall, as the author of the Work Product, hold all copyright interests in the Work Product, except for any third party material incorporated therein, the copyright to which shall be owned by the third party. The parties (Chariot and the CLIENT) acknowledge that Work Product does not meet the definition of a “work made for hire” as such term is defined in 17 U.S.C. § 101.

License to Work Product

Upon final payment of amounts due under the SoW, the CLIENT shall receive a permanent, royalty-free, non-transferrable and non-exclusive license to use the Final Deliverables for its own internal use and, pursuant to that internal use, to edit and configure the Website for its own internal benefit. Such license is sublicensable to any internet hosting provider used by the CLIENT to host the website should they choose to host with a provider other than Chariot. The license does not allow the CLIENT to use the Final Deliverables as a service provider to third parties.

Accessibility Guarantee

If the Accessibility Guarantee applies, then we warrant that upon final delivery, the material we provide under this proposal will be resolved and free of all “error” flags (shown in red) according to the Web Accessibility Evaluation Tool (WAVE) found at wave.webaim.org. These errors will be limited to the Web Content Accessibility Guidelines (WCAG) version 2.1/AA. In addition, we will work to address any “alerts” (shown in orange) or other suggestions on the WAVE checker tool during our final pre-launch QA, but can not guarantee to resolve all “alert” or “suggestion” flags beyond those marked as “errors” in red. If any “errors” are found using the WAVE checker tool at the time of launch, then, as your sole and exclusive remedy, we will correct the material within 7-10 business days after we are notified. This Accessibility Guarantee only applies at the time of website completion or launch. The Accessibility Guarantee does not apply to changes made to the material after delivery, or to any material which we do not provide such as imported blog posts, documents, or assets. Further, the Accessibility Guarantee only applies to website content (text, images, buttons, and on-screen elements) and not to downloadable or externally-linked to files and documents.

[If Opting Out of the Accessibility Guarantee] If the WCAG Accessibility Service is not included in the Fee Summary page of this proposal upon signing, then neither WCAG compliance nor the Accessibility Guarantee will be part of the agreed-to scope of work. If the WCAG Accessibility Service is not included, we make no promise that any material we develop will comply with the Web Content Accessibility Guidelines or with any other standards or guidelines for website accessibility. You should determine if this compliance is required for your website.

Work Product Confidentiality

The CLIENT agrees that the Work Product (including, but not limited to Final Deliverables), except to the extent discoverable by the ordinary use of the Website, (collectively, “Confidential Information”) is confidential information of Chariot and agrees (i) to take all reasonable measures to protect the confidentiality of Confidential Information and to protect it against disclosure to any third party who has not been authorized by Chariot to possess it; (ii) not to use Work Product except for the operation of the Website, (iii) to ensure that each of its officers, employees, directors, agents, vendors, affiliates and other personnel who have access to Confidential Information comply with the provisions of this Section.

PERMISSIONS AND RELEASES:

The CLIENT agrees to indemnify and hold harmless Chariot Creative, Inc. against any and all claims, costs, and expenses, including attorney's fees, due to materials or assets included in the WORK at the request of the CLIENT for which no copyright permission or release was attained or uses which exceed allowances pursuant to permission or release.

PUBLICATION:

The CLIENT may publish or disclose the final, approved WORK; Chariot asks that the CLIENT acknowledge the support of Chariot Creative, Inc. in such publications. Chariot Creative, Inc. reserves the right to publish the name of CLIENT, along with the final, client-approved WORK, as a display of capability, unless otherwise requested by the CLIENT. Regarding final deliverables that are publicly accessible websites, CLIENT agrees to allow the a small website credit to be displayed at the very bottom of the website; e.g. Site by Chariot, in the footer of all website pages that includes a URL link to the Chariot Creative website.

TERMINATION:

The CLIENT may request to stop work and terminate the remainder of this agreement at any time during the project by submitting a request to do so in writing to Chariot Creative, Inc. Chariot will then have 3 business days to stop work. Chariot Creative Inc. may also request to stop work and terminate the remainder of this agreement in writing. If this project, or any future project during this relationship, is terminated, Chariot Creative Inc. may invoice the CLIENT for any unpaid-for hourly work that has been completed prior to the date that work is stopped. The initial down payment to begin work (payment #1 of this project) is non-refundable. With exception of the initial down payment, if a project is terminated, Chariot Creative Inc. shall refund the CLIENT for any paid-for work that has not yet been completed. *i.e. Design or Development work that has been paid for but not yet fulfilled.*

NON-DISCLOSURE AGREEMENT:

1. For purposes of this Agreement, "Confidential Information" shall mean any and all non-public information, including, without limitation, technical, developmental, marketing, sales, operating, performance, cost, know-how, business plans, business methods, and process information, disclosed to the Recipient.

2. All Confidential Information disclosed to the Recipient will be used solely for the Business Purpose and for no other purpose whatsoever. The Recipient agrees to keep the Disclosing Party's Confidential Information confidential and to protect the confidentiality of such Confidential Information with the same degree of care with which it protects the confidentiality of its own confidential information, but in no event with less than a reasonable degree of care. Recipient may disclose Confidential Information only to its employees, agents, consultants and contractors on a need-to-know basis, and only if such employees, agents, consultants and contractors have executed appropriate written agreements with Recipient sufficient to enable Recipient to enforce all the provisions of this Agreement. Recipient shall not make any copies of Disclosing Party's Confidential Information except as needed for the Business Purpose. At the request of Disclosing Party, Recipient shall return to Disclosing Party all Confidential Information of Disclosing Party (including any copies thereof) or certify the destruction thereof.

3. All right title and interest in and to the Confidential Information shall remain with Disclosing Party or its licensors. Nothing in this Agreement is intended to grant any rights to Recipient under any patents, copyrights, trademarks, or trade secrets of Disclosing Party.

4. The obligations and limitations set forth herein regarding Confidential Information shall not apply to information which is: (a) at any time in the public domain, other than by a breach on the part of the Recipient; or (b) at any time rightfully received from a third party which had the right to and transmits it to the Recipient without any obligation of confidentiality.

5. In the event that the Recipient shall breach this Agreement, or in the event that a breach appears to be imminent, the Disclosing Party shall be entitled to all legal and equitable remedies afforded it by law within North Carolina, and in addition may recover all reasonable costs and attorneys' fees incurred in seeking such remedies.

6. The validity, construction and enforceability of this Agreement shall be governed in all respects by the law of North Carolina, USA. This Agreement may not be amended except in writing signed by a duly authorized representative of the respective Parties.

The CLIENT and Chariot Creative, Inc. are independent parties and nothing in this Agreement shall constitute either party as the employer, work for hire, principal or partner of or joint venture with the other party. The undersigned agrees to the terms of this agreement on behalf of his or her organization.



WHAT'S NEXT?

To proceed with this project:

1. Review and select any options you'd like to add on the [Fee Summary page](#).
Contact us to request changes or additional work.
2. E-sign the Proposal below.
3. Done! We will invoice you for the first payment.

Thanks! We are looking forward to working with you!

SIGNATURES

CLIENT:

Stephanie Deming
Sterling Montessori

 SIGNATURE
Stephanie Deming

Chariot Creative, Inc:
Jason Cooke
President

 SIGNATURE
Jason Cooke

FINANCE COMMITTEE

Meeting Report - June 12, 2025

Committee Actions:

- Amended and approved 2024-2025 Budget
- Approve a version of the 2025-2026 Budget for auditors (Which version?)
- Discuss sliding scale tuition and/or scholarships with proposals and research

Minutes from June 12, 2025 Meeting:

Attendance and Call To Order

(Virtual)

Chair: Jessi Fasola

Board Members: Daphne Coulter, Ryan Hill, Kim Elliott

Others: Elizabeth Uzzell, Betty Warren,

Meeting was called to order at 12:03PM

- 24-25 Budget Review
 - Maati Board Consultant - OK To spend 24-25? Yes, by June 30.
- National Boards supplement* (Elizabeth)
 - Counselor candidate asked about National Boards certification; we used to pay supplement, but stopped a few years ago--this supplement is still offered in our policy handbook. We need to decide if we are going to offer this supplement again. I would like to look at the budget implications for offering this supplement again. I do not believe this would impact any current teachers.
 - Right now would be one, but if we select this we have to do that for all future teacher candidates
 - We will do it case-by-case and remove it from the handbook
- \$5000 band/choral director supplement
 - We will keep this for new hire
- Online subscriptions
 - Have a new subscription they want to be approved
 - How do we streamline and make sure we are using what we pay for?
 - We recommend pausing all, not yet. Each subscription should be justified and also make a wishlist.
- EC teacher contract buy-out
 - EC contractor buy-out to be a hired teacher. \$18k to buy out her contract. 34 years of experience.
- Promissory Notes - Came up on HR audit. We need to see if this is legal, get attorney to review.
- Admin assistant position
 - Can we afford this?
 - Discussion on the roles of the position.
 - Preference for us to have the office manager/admin assistant role on Manager scale and then hire a 10 month receptionist on Assistant scale.
- Tuition assistance or sliding scale for 3 and 4 year olds
 - Unable to really evaluate at this time
 - We need to set an amount for the budget and after that, cannot accept sliding scale positions.

- Research done, proposals needed for the board to review.
- 25-26 Budget Review - Anything else to discuss
 - Federal allotments on table
 - Need to be cautious right now
 - Enrollment concerns

Closure and Next Steps:

Meeting was adjourned at 1:22pm ; Any follow-up actions noted above.

Next Meeting July 8, 2025 at 12:00pm

Governance Committee

Regular Monthly Meeting Report - June 2, 2025

Committee Actions and Recommendations: None

Minutes from June 2, 2025 Meeting:

Attendance and Call To Order


Virtual via Google Meet

Chair: Keisha Pressley

Board Members Present: Dwayne Jones

Call to order at 12:08 pm

Recruiting / Succession planning

- Consider having a backfill for each position currently on the board
- Discussed possibility of each board member considering a professional or community members within their specialty to encourage to consider the Sterling Board.
- Consider hosting a Board of Directors Interest night to answer community questions about the board and its role to encourage participation with the goal of Sterling Community Members who are passionate about Sterling to apply and share their time and talents.
- Reviewed Preliminary Board Recruiting Tool to be shared with the LHU Board
Final product could possibly going out to families with the end of year information or beginning of school year information.
-  LHU Strategic Calendar
 - Strategic Meeting Planning for summer - schedule (in person with virtual option if necessary)
- Review open committee chair seats:
 - Secretary Role, back up for Ryan in the event that he is unable to attend for any reason.
 - Marketing - Ryan created a document to be shared broadly for interest.

Meeting was adjourned at 12:35 pm

Recommendations for Employment

Recommendation for Administrative Appointment

Cathy Constantine, Applicant to Upper Elementary & Middle School Director; effective start date **7/1/2025-6/30/2026**.

Background Information

Education

Earned B.A. degree in Human Development, Minor in Early Childhood Intervention, Lesley University, 2003

Earned Montessori Teacher Certificates: Northeast Montessori Institute at Endicott College, 3-6, 1988; Seacoast Training Center, 6-9, 2003; 9-12, 2006

Experience

Lower Elementary Program Director, Sterling Montessori Academy and Charter School, Morrisville, NC, January 2021 - June 2024

Elementary Program Coordinator, Follow the Child, Raleigh, NC, Sept 2015 - April 2017

Head of School, Montessori Community School, Durham, NC, May 2012 - Nov 2014

Primary Program Director, Montessori Community School, Durham, NC, July 2008 - May 2012

Recommendation for Administrative Appointment

Ellie Shameli, Applicant to Lower Elementary & Specials Director; effective start date 7/1/2025-6/30/2026.

Background Information

Education

Earned B.S. degree in Applied Mathematics with emphasis on Teaching, Teachers Training University, Tehran, Iran, 1991

Earned M.A. degree in Elementary Education, North Carolina State University, Raleigh, NC, 2023

Earned Early Childhood Teacher Certificate (3-6), The Center for Guided Montessori Studies, 2022

Experience

Children's House Lead, Sterling Montessori Academy and Charter School, Morrisville, NC, 2020 - present

Children's House Teacher Assistant, Sterling Montessori Academy and Charter School, Morrisville, NC, 2019 - 2020

Founder, Montessori-Based Farsi Language Instruction, Iranian Cultural Society of North Carolina (ICSNC), June 2022 - Jan 2025

Name	Status	Position	Section/Room
Aruna Sudhaharan	Rehire	Associate	MS
Sarah Martinez	Hire	Lead	LE
Randolph Sodano	Hire	Counselor	US/MS
Amy Joyce	Rehire	Lead	CH
Manjari Parten	Hire	Lead	EC
Rachel Hertz	Hire	Lead	Music
Barbara Lincoln	Hire	Lead	EC/C12
Revathi Dandu	Hire	Assistant	CH
Paige Ossman	Hire	Executive Assistant	ED
Shirleen Zheng	Hire	Floater	LE
Delacie Bowers	Hire	Lead	EC