

### Application Preliminary Evaluation Packet

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

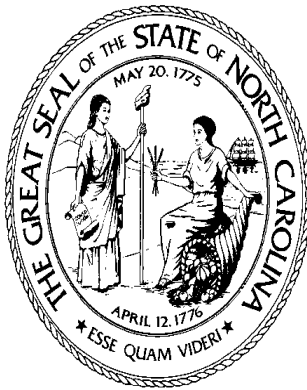
- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets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

#### Subcommittee Members:

Jennifer Gnann  
Tammi Sutton  
Steven Walker  
Danielle Allen  
Cheryl Turner  
Bruce Friend  
Ashley Baquero  
Alan Hawkes  
Alex Quigley  
Joe Maimone  
Lindalyn Kakadelis  
Kristen Parker  
Lynn Kroeger  
Phyllis Gibbs  
Jessica Whalen  
Robert McOuat  
Shannon Stein  
Sherry Reeves

Stephenie Clark  
Heather Soja

**Date of Review:**



## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# North Raleigh Charter Academy

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

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

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

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

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

**APPLICATION DUE DATE/TIME**

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

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

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

**APPLICATION SPECIFICATIONS**

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

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

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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: North Raleigh Charter Academy

X

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

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

Name of non-profit organization under which charter will be organized or operated: *Triangle Charter Education Association*

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

Name of contact person: *Allen Taylor, Jr.*

Title/Relationship to to nonprofitMunicipality: *Board President*

Mailing address: 11408 Lostwood Lane  
Raleigh NC 27614

Primary telephone: 919-757-2343 Alternative telephone: 770-500-9037

E-Mail address: Ataylorjr@gmail.com

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

County: WAKE

LEA: 920-Wake County Schools

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

No:

Yes: X

If so, provide the name of the third party person or group. Charter Schools USA

List the fee provided to the third party person or group. 0

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

Our Education Management Organization (EMO), Charter Schools USA (CSUSA), assisted us in the development of this charter application for the proposed school, North Raleigh Charter Academy (NRCA). CSUSA will assist us throughout the entire application process and if we are awarded a charter, they will assist us throughout school start up and operation.

The information we have provided in this application may be similar or identical to information that you will find in the application of other applicants who have also partnered with CSUSA. This similarity is intentional. Our board wants to use the same successful EMO model and has based our application upon the use of that model in the community we seek to serve. CSUSA has assisted us with the preparation of our application to preserve fidelity to the CSUSA school model that we studied and desire. The model has been adjusted as necessary to align with our mission, community and targeted student population. Throughout our application we are using "AOC" as shorthand to denote the attribution of content to the CSUSA model.

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

No:

Yes:

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

No:

Yes:

*If replication, please provide the name of the charter school and the state that charter school has been authorized to operate in.* Cardinal Charter NC

*Do you want your application to be considered for Fast Track?*

Yes:

No:

*Are you a non-profit corporation board partnering to replicate an existing model operated by an EMO/CMO?*

*Are you a board of directors of a proposed municipal charter school partnering to replicate an existing model operated by an EMO/CMO?*

Yes:

No:

### *Eligibility Criteria*

*A non-profit corporation board that currently operates a charter school in NC is eligible to apply to replicate it currently existing model only if the non-profit corporation board's current school or schools demonstrate a consistent track record of academic, financial, and operational success. If the board operates more than one school, each school must meet this standard. To meet this standard, the non-profit corporation board must meet each of the following conditions:*

*Each school operated by the non-profit corporation must have academic outcomes at least comparable to those of the students enrolled in the LEAs in which they are located. In addition, each school operated by the non-profit corporation must meet or exceed student growth consistent with State*

*standards, for the three years immediately preceding the application, and maintain that growth throughout the application period.*

*The board of directors of the municipal charter school must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina (1) have an academic proficiency comparable to the LEAs in which the current schools are located; or (2) meet or exceed growth for the three years immediately preceding the application at issue. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board of directors must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.*

Yes:

No:

*\*Attach as Appendix A the educational outcomes for the replicated school for the last three academic years.*

*Each school operated by the non-profit corporation must have unqualified audits for the three years immediately preceding the application and must maintain that fiscal standard throughout the application period.*

*The board of the municipal charter must demonstrate that each of the schools in North Carolina managed by the EMO/CMO have unqualified audits without fiscal compliance issues for three years immediately preceding the application. If the EMO/CMO does not currently manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board of directors must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The board of directors must maintain this standard through the application period.*

Yes:

No:

*Each school operated by the non-profit corporation must have resolved any noncompliance issues cited by NCDPI during the three years immediately preceding the application and must maintain this standard throughout the application period.*

*Each school operated by the municipal charter school board must have resolved any noncompliance issues cited by NCDPI during the three years immediately preceding the application and must maintain this standard throughout the application period.*

Yes:

No:

*A majority of the non-profit corporation board members and 50% or greater of the board officers must be North Carolina residents.*

*A majority of the municipal charter school board of directors and/or 50% or greater of the board officers must be North Carolina residents.*



Yes:  
No:

### Eligibility Criteria

*A non-profit corporation board that does not currently operate a charter school in NC is eligible to apply to replicate through fast-track replication an existing model operated by an EMO/CMO. The non-profit corporation board is eligible to apply only if the schools operated by the EMO/CMO have a consistent track record of academic, financial, and operational success. The non-profit corporation is eligible to replicate an existing model operated by the EMO/CMO only if the non-profit corporation board meets each of the following conditions:*

*The non-profit corporation board must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina (1) have an academic proficiency comparable to the LEAs in which the current schools are located; or (2) meet or exceed growth for the three years immediately preceding the application at issue. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.*

*A board of directors that does not currently operate a charter school in NC is eligible to apply to replicate through fast-track replication an existing model operated by an EMO/CMO. The board is eligible to apply only if the schools operated by the EMO/CMO have a consistent track record of academic, financial, and operational success. The board is eligible to replicate an existing model operated by the EMO/CMO only if the board meets each of the following conditions:*

*The board must demonstrate that each of the schools being managed by the EMO/CMO in North Carolina (1) have an academic proficiency comparable to the LEAs in which the current schools are located; or (2) meet or exceed growth for the three years immediately preceding the application at issue. If the EMO/CMO does not manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for academic performance. The EMO/CMO must continue to meet these standards throughout the application period.*

Yes:   
No:

*\*Attach as Appendix A the educational outcomes for the replicated school for the last three academic years.*

*The non-profit corporation board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO have unqualified audits without fiscal compliance issues for three years immediately preceding the application. If the EMO/CMO does not currently manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the non-profit corporation board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The non-profit corporation board must maintain this standard through the application period.*

*The board must demonstrate that each of the schools in North Carolina managed by the EMO/CMO*

*have unqualified audits without fiscal compliance issues for three years immediately preceding the application. If the EMO/CMO does not currently manage any schools in NC or the schools it manages in NC do not yet have the data listed above, the board must demonstrate to the SBE that the schools operated in other states by the EMO/CMO meet similarly rigorous standards for financial performance. The board must maintain this standard through the application period.*

Yes:

No:

*A majority of the non-profit corporation board members and 50% or greater of the board officers must be North Carolina residents.*

*A majority of the board members of a municipal charter school and 50% or greater of the board officers must be North Carolina residents.*

Yes:

No:

### *Acceleration*

Yes:

No:

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

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

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

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

Yes:

No:

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

Yes:

No:

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

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

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

- 1. Unique mission and educational program.*
- 2. Local, state, and national nonprofit partnerships committed to assisting the school.*
- 3. Potential for economic and educational development of the region.*
- 4. Mentoring by a successful organization that has experience in creating public schools.*
- 5. Obstacles to educational reform efforts that leave chartering as an available option.*

6. *Commitment to work with a successful charter school board as a guiding mentor.*
7. *The length of time the board of directors has existed.*
8. *Whether the proposed board has previously or currently operates a successful public charter school.*

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

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

1. *The school must include grades 9-12.*
2. *At least 75% of the school's population in grades 9-12 must be at-risk of academic failure as defined in GCS-Q-001, I.B, and must also meet one or more of the following indicators:*
  - a. *The student must either be recently released from a juvenile justice facility, or otherwise be subject to and participating in the juvenile justice court process;*
  - b. *The student must be currently served by a treatment facility licensed pursuant to Chapter 122C of the General Statutes, or have recently been discharged from such a facility;*
  - c. *The student must be currently under long-term suspension from a public or private school ; or*
  - d. *The student must be a high-school dropout as defined in GCS-Q-001; or be imminently at risk of dropping out as demonstrated by adequate documentation in the charter school's application for designation under this policy.*

Yes:

No:

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

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

*What is the name of the nonprofit organization that governs this charter school?* Triangle Charter Education Association

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

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

Projected School Opening: Year 2020

Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K, 01, 02, 03, 04, 05, 06	615
Year 2	K, 01, 02, 03, 04, 05, 06, 07	690
Year 3	K, 01, 02, 03, 04, 05, 06, 07, 08	765
Year 4	K, 01, 02, 03, 04, 05, 06, 07, 08	765
Year 5	K, 01, 02, 03, 04, 05, 06, 07, 08	765

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

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

trianglecharter  
Signature

Board Chair  
Title

trianglecharter  
Printed Name

10/01/2018  
Date

<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>Would like more information on the projected numbers? Interest surveys and commitments? Not just waiting lists from other charter school.</u>	<u>Heather Soja</u>	<u>Grade Levels</u>
<u>Please explain rationale in opening school to serve elementary and middle grade students in the first year of operation.</u>	<u>Jessica Whalen</u>	<u>Grade Levels</u>
<u>Would like to know more about projected numbers and whether they are realistic.</u>	<u>Heather Soja</u>	<u>Certify Appl</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Jennifer Gnann</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Danielle Allen</u>	
<u>Cheryl Turner</u>	
<u>Bruce Friend</u>	
<u>Ashley Baquero</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Alex Quigley</u>	
<u>Joe Maimone</u>	
<u>Lindalyn Kakadelis</u>	
<u>Kristen Parker</u>	<u>Pass</u>
<u>Lynn Kroeger</u>	
<u>Phyllis Gibbs</u>	
<u>Jessica Whalen</u>	<u>Pass</u>
<u>Robert McQuat</u>	
<u>Shannon Stein</u>	<u>Pass</u>
<u>Sherry Reeves</u>	
<u>Stephenie Clark</u>	
<u>Heather Soja</u>	<u>Pass</u>

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### **Mission:**

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

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

NRCA's mission is to build a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology-rich methodology tailored to meet their needs.

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

A student-centered environment focuses on the needs and interests of the students. As such, the school will employ data-driven techniques to ensure that each student is performing to his/her greatest potential. Every aspect of the technology-rich learning environment benefits from a consistent instructional platform that gives students the ability to develop critical thinking skills to solve problems, retain knowledge, and apply that knowledge in an interactive learning environment.

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

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

NRCA plans to focus on the student population residing in and around the Wake Forest community located in north Wake County. The bordering counties of Franklin and Granville are also included in the projected student population. A site has already been identified for the school on Falcate Drive. The seller has agreed to hold the property throughout the application process, and we will begin finalizing site acquisition once this application is approved.

To project the student body NRCA will serve that is reflective the diversity of the surrounding community, local public and/or charter school populations were measured within a 15-minute drive-time of our proposed site, which is located on Falcate Drive just east of Capital Boulevard. This produced the following estimates:

- \* Proposed School Size: 765
- \* Minority Population: 43%
- \* Free and Reduced Lunch (FRL) Population: 31%
- \* English Language Learner (ELL) Population: 6%
- \* Exceptional Children (EC) Population: 10%

\* EC Population (Including academically or intellectually gifted (AIG)): 24%

Demographic and population information was obtained through an analysis using Environmental and Social Research Institute (ESRI) mapping software, which is based on current census data and future projections. The community of Wake Forest was chosen due to its current student-aged population and population growth rate, as well as the overcrowding and below-average performance of the public schools in the area. Within the 15-minute drive-time mentioned above, the percentage of the population of school-aged children (5-14) is approximately 17%, which is much higher than the state average, which is currently 13%. Moreover, the population growth rate within this same area is projected to be approximately 2.7% annually between 2018 and 2023, which is exponentially higher than the states current average growth rate of 1.14%. For reference, the US population growth average is currently 0.7%.

In addition, an analysis of the public schools that serve grades K-8 within that same drive-time shows that there is only one public school within 5 minutes. The lack of public schools within the immediate area, compounded with the fact that the average capacity utilization for all public schools that serve grades K-8 within 15 minutes is currently at 96%, will make it very difficult for the existing schools to mitigate the impact of the aforementioned growth on overcrowding. There are also limited public school options for families who live in the southeast corner of Granville County, from where we anticipate 5% of our student population to come. The nearest public schools in Granville County that serve grades K-8 are located in the area of Creedmoor, which is approximately nine miles from Granville's southeast border with Wake County.

Furthermore, academic performance of these schools is below average. Only two schools within the 15-minute drive-time earned an A for the 2017-18 school year, one of which was a charter school, and eight earned a B (three of which were charter schools). The remaining 13 schools earned a C, which averages to a C grade for all schools within 15-minutes of our anticipated site. Moreover, all the schools that earned either an A or B grade are currently over 100% capacity except for Endeavor Charter, which is at 89%, and Wakefield Middle, which is at 83%. Please see Appendix A1 for a School Market Summary that lists these schools and their pertinent demographic data.

Families in the Wake Forest community will need more quality school choice options due to overcrowding issues, and as the population grows, their choices will only become more limited. NRCA will provide a quality school choice option for the community and its families as well as increase the capacity of the public school system in the area to help alleviate current overcrowding issues and mitigate the impact of the projected rapid population growth.

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

The total projected enrollment for NRCA is 765 students in grades K-8. The

Wake County Public School System is the largest school district in North Carolina by enrollment, with approximately 160,000 total students for the 2017-18 school year. Franklin County, to its northeast, had enrollment of approximately 8,000 total students for the 2017-18 school year, while Granville County, to its northwest, had enrollment of approximately 7,500 total students. At full capacity, NRCA plans to enroll 80% of its students from Wake County, 15% from Franklin County, and 5% from Granville County. These projections equate to NRCA enrolling 0.50% of Wake County's K-8 student population, 2% of Franklin County's K-8 student population, and 0.70% of Granville County's K-8 student population.

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

NRCA's education plan differs from Wake County in that it will provide individualized, data-driven instruction within a culture of high expectations and achievement that emphasizes 21st century learning in a technology-rich environment.

NRCA's student-centered approach will foster individualized attention that provides an opportunity for students to reach their potential and receive the required differentiated instruction to demonstrate growth, while still maintaining access to a standards-based curriculum. In support of our mission, we believe each instructional minute counts. As a result, our academic calendar exceeds the requisite 1,025 instructional hours to provide maximum opportunities for students to learn and practice new concepts, develop 21st century skills, and allow teachers time to provide engaging instruction tailored to student need.

Each student will have a Personalized Learning Plan (PLP), which includes student data and student-initiated goals for the school year. The PLP also outlines the steps necessary to accomplish goals and involves ongoing collaboration between the teacher, student, parent, and other staff involved with the student's academic achievement. Throughout the PLP process, teachers build the capacity of students to understand their data, make good decisions as learners, and follow through with expectations. Throughout the year, the PLP serves as a vehicle for teacher-student data chats, which supports students in conducting parent-student data conferences and encourages a growth mindset.

NRCA's learning environment will integrate technology to support students in developing key 21st century learning skills:

- \* Creativity
- \* Critical thinking
- \* Communication
- \* Collaboration

The Partnership for 21st Century Skills defines a 21st century learning environment as a space (both physical and virtual) that accommodates the diverse learning needs of individual students and fosters positive and healthy relationships deemed necessary for attaining 21st century knowledge and skills. NRCA's technology-rich environment will serve to provide students with meaningful, real-world learning experiences essential to preparing them for future success and nurturing intellectual curiosity. Additionally, teachers will be supported in implementing a broad set of



knowledge, skills, work habits, and character traits that are critical to success in today's world.

To further challenge students, NRCA may apply to offer the Cambridge program for students in grades 3-5. Cambridge studies are demanding and emphasize higher order thinking; oral, writing, and investigative skills; problem solving; and teamwork. Highly motivated students who excel academically and are well rounded in their extracurricular activities are attracted to this program, which provides an emphasis on research and global studies that compliment state standards.

Technology resources will be used for a variety of instructional methods, including blended learning, conducting research, and more. Teachers will have ready access to vetted programs, tools, products, and approaches used to increase student engagement and make connections to real-life applications. The goal of technology usage is to create an interactive classroom, taking technology out of the hands of teachers and placing it in the hands of students for an optimal experiential learning environment.

Another unparalleled aspect is the amount of support NRCA will receive to monitor progress, enhance teacher effectiveness, and maximize its overall operation. Described in more detail throughout the application, leaders and teachers will receive extensive training prior to the start of the school year through professional development (PD) tailored to the needs of the student population. The CSUSA Carolinas network provides numerous opportunities for PD and collaboration, including site visits to monitor implementation of the Education Model and school-wide initiatives.

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

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

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

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

NRCA will strive to improve student learning and be held accountable for meeting measurable achievement results in the following manner:

#### Personalized Learning Plans

PLPs, as described above, are designed to track individual strengths, weaknesses, and cumulative progress in attaining a year's worth of learning. The PLP empowers students to develop learning goals and track their own progress, fostering a stronger sense of student ownership. Baseline achievement levels are incorporated into each student's PLP as a starting point for determining future rates of academic progress. Students and parents are able to consider areas of mastery and deficiency based upon data reports, which provide details regarding skills that have been mastered, need to be remediated, or are ready to be learned next. Students set personal goals each quarter that are confirmed by teachers, and teachers post formative data to support student goal-setting. Additionally, students are guided in developing the skills to conduct their own PLP conferences with parents, which take place at a minimum of twice annually.

#### Multi-Tier System of Supports (MTSS)

Implementation of an MTSS model ensures that all students are given the instruction and support needed to succeed. NRCA will utilize MTSS guidelines to quickly identify student learning and behavior needs that require a coordinated focus of staff and school resources. A multi-tiered approach is essential to ensuring growth for all students and promotes a sense of shared responsibility among staff and leadership for the success of the entire school and each student. The identification process for academic supports within the MTSS model begins with the implementation of high-quality instruction and universal screening of all students in the general education classroom setting. Interventions are provided at increasing levels of intensity for identified students intended to accelerate student learning. Student progress is closely monitored and used to assess the effectiveness of the intervention. The MTSS model is comprised of three tiers described further in the application:

- \* Tier 3-Intensive Individualized Intervention and Support
- \* Tier 2-Targeted Supplemental Intervention and Support
- \* Tier 1-Core Universal Instruction and Support

#### Push-in/Pull-out Support

Students can receive targeted instruction through push-in/pull-out instruction, aligned with MTSS. Teachers are trained in the intervention program and are available to push-in with, or pull-out students who are performing below grade level in order to meet the demands of the curriculum. Customized weekly schedules are followed to guarantee students are receiving additional instruction as needed. Classroom teachers will communicate with the support staff to increase awareness of students' current skill levels and abilities. This additional time for instruction outside of class time is crucial for increasing student learning gains, as increased instructional minutes

is the primary driver for catch-up growth, as stated in Annual Growth for All Students and Catch Up Growth for Those Who Are Behind. (Fielding, Kerr, Rosier 2007).

#### Tutoring/Saturday School

Tutoring provides students with additional instructional minutes beyond the regular school day focused on high-priority grade-level standards as well as test taking strategies. Tutoring will be offered to students who require remediation and intensive practice to master standards and demonstrates just one way the school will give multiple opportunities for students to reach proficiency in grade-level content. NRCA's tutoring program is designed to accommodate student schedules by offering before/after school tutoring sessions, Saturday tutoring sessions, and boot camp tutoring sessions as necessary. Tutoring group size will be limited to 15 or fewer students, allowing for more individualized attention.

Based on the enrolled student population, enrichment opportunities may also be provided for students performing on or above grade level.

#### Cambridge

To further challenge students, NRCA may apply to offer the Cambridge program for students in grades 3-5. Cambridge studies are demanding and emphasize higher order thinking; oral, writing, and investigative skills; problem solving; and teamwork. Highly motivated students who excel academically and are well rounded in their extracurricular activities are attracted to this program, which provides an emphasis on research and global studies that compliment state standards.

#### Success Time

NRCA will implement Success Time, a dedicated period in the school day for students to receive standards-aligned tutorials and enrichment sessions. Success Time supports the school's mission of providing individualized, data-driven instruction within a culture of high expectations and achievement. Success Time is based on Patricia Davenport's 8-Step Process for Continuous Improvement, a proven approach to aligning resources toward student performance that encourages collaboration among teachers, students, and instructional staff. After each instructional cycle, made up of approximately 20 instructional days and based on the Education Model's Guaranteed and Viable Curriculum (GVC), teachers administer common monthly unit assessments. Student mastery data is then analyzed to determine instructional groupings and the focus for Success Time sessions. School leadership will participate in summer training sessions related to the 8-Step Process for Continuous Improvement and receive ongoing support through the CSUSA Carolina's network to facilitate effective planning for a daily 30-minute, school-wide Success Time and ensure instructional resources are maximized. NRCA's Success Time will be instrumental in providing the extra time necessary for students to make gains in learning and nurture individual strengths, while increasing professional collaboration among staff members.

#### Accountability

As a charter school, NRCA will be held to high standards of achievement in order to continue serving the community, making accountability an integral part of the school culture. Consistent, regularly monitored measures will ensure we are meeting the expectations and goals described in this application. The Board will monitor progress toward school goals, the principal will monitor class-level goals, and teachers will monitor individual student goals. Monitoring will be conducted through monthly Board meetings, CSUSA's SSSP, data chats, and PLP conferences, respectively. If it is found that we are not reaching our goals at any level, programs and instruction will be adjusted accordingly.

NRCA will develop a strategic action plan focused on its mission, vision, and values and utilize CSUSA's SSSP to monitor progress toward achievement of the strategic plan. Through analysis of assessment results, observations, surveys, and other feedback items, the school will create key intended outcomes in each of the following five priority areas: academic excellence, financial health, growth, operational performance, and culture of excellence. NRCA will then create initiatives and monitor their implementation throughout the year. This plan is continuously reviewed and monitored at the school level, along with the Board, the EMO's State Director, Curriculum and Instruction Team, and CSUSA.

Weekly classroom walk-throughs and teacher performance evaluations will hold teachers accountable for providing students with rigorous, high-quality instruction. Lesson plan delivery, grade book checks for alignment with the school's grading philosophy, and other preparedness and organizational components are also checked regularly. The leadership team will also monitor the integration of 21st century learning skills and technology resources to ensure teachers are creating engaging and relevant experiences that enhance instruction.

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

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

The principal provide's a status report to the Board at monthly meetings, which includes educational, enrollment, personnel, and various other operational reports.

#### Operations

##### Specific:

- \* Market to and enroll the targeted number of students each year.
- \* Ensure adequate food, transportation, security, and custodial services.
- \* Ensure building standards are met.
- \* Procure furniture, fixtures, equipment, and school supplies as needed.
- \* Develop and update the school's website on a regular basis.

Measurable: CSUSA's New School Opening Team (NSOT) will ensure each of these goals are met prior to school opening.

Attainable: These goals are critical to the operation of the school and are expected to be attained.

Relevant: Operational effectiveness is crucial to the schools success in fulfilling its mission.

Time Bound: These goals are expected to be met before each school year and maintained throughout the year.

#### Academic

Specific: Each year on the math, reading, and EOG/EOC, NRCA will significantly increase student proficiency (level 3 or higher). If proficiency is at or above 90% in any prior year, NRCA will increase proficiency by 1% or meet or exceed the performance of demographically similar area schools. In Year 1, without a baseline, NRCA will meet or exceed the proficiency of demographically similar area schools.

**Measurable:** In the absence of statewide guidance on what constitutes a significant increase, a significant increase will be defined as a 2% increase in the number of students who are Proficient on the Reading and Science EOGs, and a 2.7% increase in the number of students who are Proficient on the Math EOG, as outlined in the ESSA-aligned "All Student" subgroup improvement rate. EOG/EOC scores in Year 1 establish a baseline. Scores in Year 2 will provide the initial baseline comparison.

**Attainable:** These goals are attainable, given that our students will have the appropriate resources and access to high-quality teachers.

**Relevant:** This goal is relevant to NRCA's mission, highlighting the importance of a rigorous education program.

**Time Bound:** The establishment of a baseline will occur at the completion of the first full year of the charter. At the end of each year, NRCA will document goal attainment and revise multi-year goals.

Please see Appendix O for a detailed academic goals table.

## Finance

### Specific:

- \* Develop accounting systems and internal control policies that allow for safeguarding of assets and financial viability.

- \* Timely submission of financial reports as required.

- \* Prepare applications for grants and loans.

- \* Adopt, maintain, and (if necessary) amend the annual budget.

- \* Ensure NRCA contracts with a certified public accountant for the annual financial audit.

- \* Review and approve audit reports, including audit findings and recommendations.

**Measurable:** These goals will be measured by the school's financial standing and compliance.

**Attainable:** Given the financial efficiency of other CSUSA schools, these goals are attainable.

**Relevant:** The school's financial standing and reporting compliance is relevant to its overall sustainability.

**Time Bound:** Financial reports will be submitted as needed and the operating budget will be amended annually.

## Governance

### Specific:

- \* Set policies, including:

- o Operational policies

- o Academic and financial accountability

- o Annual progress reporting to the Department of Public Instruction (DPI)

- o Policies consistent with the schools mission

- \* Review the EMO's performance reports:

- o Financial reports

- o School reports

- o Satisfaction surveys

- o Strategic plans

- o Annual accountability reports

**Measurable:** Reporting policies and their review by the Board will be measured by school-wide improvement.

**Attainable:** Given CSUSA's successful partnerships with other governing

boards, goals are attainable.

Relevant: The Board's involvement in the school's foundation and performance is vital to its overall success.

Time Bound: Policies must be set prior to school opening.

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

Goals are developed, implemented, and executed as part of a collaborative effort between the Board, CSUSA, and the school.

As the Board is the initial and leading driver of the mission, it is crucial that we stay informed of the progress of NRCA. Student assessment and performance data are vital to our mission to offer a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology-rich methodology tailored to meet their needs. With the continuous improvement Education Model, we will regularly evaluate student performance to personalize and target instruction to each student's needs, helping them reach their academic potential. This data-driven cycle of assessment, analysis, and action is critical for increasing student achievement and is the top priority for school-wide improvement. Regular assessments will verify whether students have successfully acquired crucial skills, mastered grade-level content, and are challenged to think critically.

In addition to state assessments, all students will take the computer-based, adaptive NWEA Measure of Academic Progress (MAP) assessment, or another growth measurement instrument, three times per year. The NWEA assessment also gives students the opportunity to practice with the newest technologically enhanced item types.

We will monitor and evaluate specific, measurable goals regarding academic performance and growth which will be tracked on three dimensions:

- \* Proficiency: The percentage of students who are proficient in math, reading, and science on the EOG and EOC assessments.
- \* Growth: At each grade-level, the percentage of students meeting growth targets in English language arts (ELA), math, and science will surpass 50%.
- \* State Accountability: The school's Performance Component of the NC School Performance Grade (SPG) will improve annually.

At the conclusion of each testing season, and throughout the year as data becomes available, NRCA will report state and interim assessments to the Board at monthly meetings. In NRCA's first year, these initial results will act as a baseline for future goals. A baseline year will also be utilized when the state introduces new state-wide assessments or SPG calculations. In lieu of a baseline comparison in Year 1, we will monitor NRCA's performance relative to demographically similar area schools.

We will also approve the Strategic Plan (described above) and School Improvement Plan (if applicable) to ensure that measures are put into place to achieve our mission of offering a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology-rich methodology tailored to meet their needs. Instructional site visit data from the EMO will deliver evidence that the teachers are adhering to the Education Model and

implementing highly effective teaching strategies.

To monitor NRCA's culture, we will view results from parent and staff surveys, which provide insight on pertinent issues such as satisfaction and safety. Financial reports, enrollment and attendance figures, and other information needed to further monitor progress toward the mission will also be evaluated.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Please detail further how technology is utilized and incorporated to deliver instruction and/or tailor to student needs?	Jessica Whalen	Mission Stat
Great summary of detailed data!	Steven Walker	Educational
What makes this "technology-rich learning environment" unique from traditional public schools?  Who will create each Personalized Learning Plan? Who will implement and own the collaboration needed for each PLP? Who will guide students in owning their data and "developing the skills necessary to conduct their own PLP conferences? If this is a teacher responsibility, will teachers be given time and training to effectively implement this aspect of the educational program?	Ashley Baquero	Educational
Would like to know more detail in the personalized learning plan that will make different from traditional counterparts?	Heather Soja	Educational
Need more sufficient evidence to demonstrate a need for this charter.  Who is responsible for making Personalized Learning Plans?  Please clarify what the following looks like and examples: "Teachers will have ready access to vetted programs, tools, products, and approaches used to increase student engagement and make connections to real-life applications."	Jessica Whalen	Educational
Applicant needs to clarify: What evidence is there to support a difference in approach from the current LEA? What evidence is there to state/show that the current LEA is not providing individualized, data driven instruction?	Kristen Parker	Educational
How can the applicant demonstrate that the local LEA is not already offering both the personalization and/or data-driven instruction?	Shannon Stein	Educational
What aspects of this program is not currently offered in surrounding schools?	Jennifer Gnann	Educational
Please clarify where "baseline achievement levels to include in students PLPs" are coming from in the first year.  Please clarify where "student formative data is posted to support student goal-setting" and describe how students will be conditioned or supported with their data potentially being publicly displayed.  How are tiers identified, how is the tier system evaluated, and who is responsible for overseeing the support system?  What is the difference between Saturday tutoring sessions and boot camp tutoring sessions? What additional supports are in place to ensure ED students are able to access these sessions?  Please describe further exactly what is Success Time and what it looks like.	Jessica Whalen	Purposes of
There is not anything specifically innovative about these details but actually implementing these consistently and utilizing the data is a novel idea in the current education environment that seems to plague our traditional counterparts.	Heather Soja	Purposes of
When you say that "building standards" must be met; what is that?  NRCA plans on a goal of meeting or exceeding local, demographically similar schools; could you be more specific since there is a wide variety of schools in that area to compare to (i.e. how will you know if you are specific)?  What is your fund balance goal?	Shannon Stein	Goals for th



<b>What type of expectations do you have for the audit (i.e. not exceptions, etc.) other than reviewing it?</b>		
<b>Are there any Board specific training expectations?</b>		
<b>Goals are not adequate SMART goals.</b>	<b>Jessica Whalen</b>	<b>Goals for th</b>
<b>How are growth targets calculated?</b>		
<b>How will the board know the Strategic Plan/School Improvement Plan that is adopted is followed?</b>		

<b>Reviewer</b>	<b>Score</b>
Jennifer Gnann	Pass
Heather Soja	Pass
Steven Walker	Pass
Danielle Allen	
Cheryl Turner	
Bruce Friend	
Ashley Baquero	Pass
Alan Hawkes	
Alex Quigley	
Joe Maimone	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Robert McOuat	
Jessica Whalen	Fail
Phyllis Gibbs	
Lynn Kroeger	
Kristen Parker	Pass
Lindalyn Kakadelis	

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

The proposed Education Model is an instructional philosophy developed after extensive study of instructional practice and grounded in over 35 years of Dr. Robert J. Marzano's research. Its purpose is to facilitate each student's mastery of the North Carolina Standard Course of Study's (NCSCS) content standards. Its structure enables administrators and teachers to better understand, explain, and predict the elements needed to ensure student academic success. The heart of the Education Model is the GVC, which is comprised of a year-long plan for standards-based instruction at each grade level. The GVC ensures steady academic progress as students build their knowledge and skills from one year to the next to master state standards. The GVC is primarily a combination of factors that have strong correlations with academic achievement: "opportunity to learn" and "time," which address the extent to which the curriculum is "guaranteed" (Marzano). After clear guidance is given to teachers regarding the content to be mastered in specific courses and at specific grade levels, CSUSA and NRCA's administration monitor learning so academic content necessary for achievement within each grade is not disregarded or replaced.

Successful implementation of the Education Model is supported by a framework comprised of Core Fundamental Educational Components (Core Fundamentals) and Patricia Davenport's 8-Step Process for Continuous Improvement.

#### Core Fundamental Educational Components

Successful implementation of the Education Model is supported by a framework comprised of 16 Core Fundamental Educational Components. The Core Fundamentals provide a structure that will enable NRCA to establish a positive school climate, attend to curriculum and instruction, and develop data literacy for all stakeholders. When implemented effectively, the Core Fundamentals create a pathway for innovation and student success. The Core Fundamentals are grouped into categories that serve as the foundation of the Education Model: School Climate, Curriculum and Instruction, and Data Literacy.

School Climate - Reflects the way the school feels, both to visitors and school community members engaged in academic and school life activities.

School climate includes:

- \* Professional Development
- \* School-wide Behavior Plan
- \* Expectations and Procedures

\* Social-Emotional Learning (SEL) and Character Education

Curriculum and Instruction Reflects the work that takes place in the classroom setting and addresses the critical elements necessary to meet student academic needs and create engaging and meaningful learning experiences. This category encompasses the following:

- \* GVC
- \* Lesson Planning and Delivery
- \* Data-Driven Instruction
- \* Instructional Focus Calendar
- \* MTSS
- \* Tutoring
- \* Instructional Software

Data Literacy - Ensures all stakeholders can access and interpret data related to school, student, and teacher effectiveness and determine next steps for growth and opportunity. Data literacy includes:

- \* Balanced Assessment System
- \* Data Chats
- \* Grading
- \* PLPs
- \* North Carolina Educator Effectiveness System

8-Step Process - The 8-Step Process represents a continuous improvement model that focuses on student performance through the alignment of planning, instruction, assessment, and support efforts school-wide. The process encourages the collaboration among teachers, students, and instructional support staff required to effectively implement the Education Model in a manner that supports a high level of data-driven instruction. The process incorporates a Plan-Do-Check-Act (PDCA) model that aligns well with the steps of the Education Model and supports improved academic achievement. The 8-Step Process includes:

1. Data Disaggregation
2. Timeline Development
3. Instructional Focus
4. Assessment
5. Tutorials
6. Enrichment
7. Maintenance
8. Monitoring

The Education Model, Core Fundamentals, and 8-Step Process are further detailed in Appendix O.

**Curriculum and Instructional Design:**

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

Clear behavior expectations and classroom management procedures posted in each room will help develop the learning environment and support the use of an agenda to protect instructional time. The agenda will serve to focus teaching and learning and facilitate daily active participation as students

learn to connect the daily learning focus with their personal learning goals. To further deepen learning, anchor charts generated during instruction that reflect step-by-step processes for taught material will be posted to serve as a reminder of instructional focus areas.

Various simultaneous learning experiences will occur, such as teachers working with a small group of students on a targeted skill, students on digital devices receiving remedial or enrichment practice, groups of students working cooperatively on a challenge-based project, or students working independently on leveled tasks. Structured procedures and behavior expectations are developed and monitored by each learning community to minimize distractions and ensure productive work spaces.

At capacity, kindergarten classrooms are designed to accommodate 20 students. First through fifth grade classrooms are designed to accommodate 23 students, while classrooms for sixth through eighth grades will accommodate 25 students. Since it is anticipated that students will perform at various levels, classrooms will be organized to accommodate differentiated instruction, including teacher-led small-group work and blended learning mobile work stations.

To create a future-ready environment conducive to the learning styles of 21st century students, NRCA will be supported in identifying, and acquiring innovative furniture and materials that are designed to stimulate learning and create classroom cohesiveness. Examples include standing desks, flexible seating design, and maker spaces. Professional development will be provided to support teachers in leveraging these tools to positively affect student learning.

NRCA will integrate tools, technology, software, and structures in classrooms to enhance the learning environment by focusing on the development of 21st century learning skills detailed earlier. Technology expands the learning environment beyond the classroom and helps cultivate interest in global issues through exploration and virtual field trips. The development of a technology rich environment and infusion of 21st century learning skills directly supports NRCA's mission of providing a student-centered, data-driven environment where students develop critical thinking skills.

Classroom resources will be maximized within each room. Both fiction and nonfiction electronic or print resources will be available to enable students to read appropriately leveled books. With the integration of technology, all students have increased targeted access to curricular resources, assessments, technology-based intervention, and enrichment enhancing differentiation. For example, NRCA will be equipped with SMART Instructional Flat Panels and the SMART Learning Suite which are used to increase student interaction and engagement in direct instruction, small group activities, and student collaboration. The following technology is available in each classroom:

- \* Interactive displays/panels with tablets
- \* Student laptops
- \* Document camera
- \* Headphones and microphones

NRCA also intends to have a production room for filming, processing, and streaming morning announcements; and multi-purpose rooms outfitted with audio/video equipment. Wireless networking will be employed to allow students access to digital content via vetted online resources.

Provide a synopsis of the planned curriculum, including:

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

NRCA will use the GVC, which is aligned to the NC Accountability Model and focuses on mastery of the standards outlined in the NCSCS, to support the mission of building a student-centered, data-driven learning environment. NRCA will also implement the requirements outlined in the North Carolina Read to Achieve Program. The research behind the GVC comes from the work of Dr. Marzano, who articulates that the GVC is primarily a combination of the factors "opportunity to learn" and "time." Both have strong correlations with academic achievement.

NRCA will implement the GVC through the process outlined in Understanding by Design, (Wiggins & McTighe). The GVC provides the specific learning outcomes within each standard and was created in three stages: 1) identifying desired results, 2) determining acceptable evidence, and 3) planning learning experiences and instruction. Through PD, teachers continue this process. Understanding by Design supports teachers working within the standards-driven curriculum to clarify learning goals, devise assessments that reveal student understanding, and craft effective and engaging learning activities aligned with real-world experiences that prepare students to achieve mastery of the Standard Course of Study for ELA and Math and State Essential Standards. The Understanding by Design process and the GVC allows educators to center the curriculum and assessments by establishing goals (content standards, course or program objectives, learning outcomes), big ideas (what specific understandings about the big ideas are desired), essential questions (what provocative questions will foster inquiry, understanding, and transfer of learning), and authentic performance tasks (the type(s) of performance tasks that learners demonstrate the desired understandings). Use of the GVC map enables educators to provide the targeted student population with optimal learning opportunities based on their individual needs. The standards are ordered and grouped in a particular way, and there are essential questions and objectives provided to target instruction. Sample resources, lesson ideas, and item specifications are included on the curriculum map to provide further guidance.

When planning for the year, teachers study the curriculum map and the test specifications in order to have an understanding of what students are expected to learn. For each unit, pacing guides are provided; however,

teachers have the flexibility to adjust pacing according to their students current levels.

Teachers are expected to incorporate technology into all lessons and are supported in doing so throughout the year. They can use interactive displays and tablets with students to incorporate online resources from Wonders, Envision, or any other vetted and proven resource. Students will supplement teacher instruction by utilizing blended learning techniques through online software programs, such as Reading Plus and Imagine Math, to work at their own pace and target deficient skills or enrich learning. With monitoring from the classroom teacher, students can take courses online through Plato for enrichment or course recovery.

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

Teachers will use multiple engaging, research-based instructional strategies, as it is our mission to provide a student-centered, data-driven learning environment. Teachers will implement Dr. Marzano's 13 high-probability instructional strategies (detailed in Appendix O), which research shows yield the most academic gains across all grade levels when employed consistently. These strategies are used in all grade levels, but instruction will vary by increasing expectations and complexity as the grade levels progress.

Instructional methods are dependent on the needs of the individual student. Teachers will adapt lessons to meet the needs of all learners through differentiating the content, process taught, and assessment type. Instruction will include leveled texts and resources for students on, above, and below grade level. Innovative learning methods will range from any or all of the following strategies briefly described below and detailed in Appendix O.

#### Student-Centered Learning

Based on Marzano's research and categories of instructional elements to guide instruction, students will be the designers of their own learning in order to obtain a deeper level of understanding. Teachers will use various Marzano strategies that focus on students developing autonomy in processing, evaluating, analyzing, and demonstrating knowledge.

#### Blended Learning

Blended learning is a style of classroom teaching in which a student learns at least in part through online delivery of content and instruction, with some element of student control over time, place, path, and/or pace. This instructional approach is conducive to the 21st century learning environment planned at NRCA.

#### Differentiated Instruction

NRCA will emphasize daily differentiated instruction to accommodate and motivate all learners. The school will follow the belief that differentiated instruction is: 1) a teachers response to student needs, 2) the recognition of students varying background knowledge and preferences, 3) student-centered, 4) instruction that addresses students differences, and 5) a blend of whole-group and small-group instruction. Teachers can differentiate in

three ways: 1) the content students are learning, 2) the process in which the material is being taught, and 3) the product that is developed to demonstrate learning.

#### Cross-Curricular Instruction and Learning

Cross-curricular instruction requires that teachers plan appropriately complex connections to more than one academic area simultaneously through a central theme, issue, problem, process, topic, or experience. This creates an opportunity for deepened understanding and addresses the issue of skill isolation.

#### Challenge Based Learning (CBL)

Allows students to use 21st century technology while working in collaborative groups to tackle real-world issues surrounding their school, families, community or global concerns. CBL allows teachers to work with students on making connections between the standards reflected in the GVC and issues within the school, family setting, community, or on the world stage.

#### Cooperative Learning

A strategy combining teamwork with individual and group accountability, allowing students of different ability levels to work jointly to improve their understanding of a subject. Within formal cooperative learning, teachers strategically group students to complete an assignment, designating roles so all students are held accountable for providing input and holding ownership of learning. For an informal cooperative learning opportunity, teachers will have students participate in focused discussions in which students make predictions, summarize learning, make connections, or respond to other teacher questions.

#### Success Time

Success Time, described earlier, provides dedicated, daily time during the school day for standards-based tutoring and enrichment based on formative assessment data after each instructional cycle.

5. *Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.*

CSUSA's GVC is aligned to the NCSCS, and is mapped to ensure teachers have adequate time to teach all standards and students have time to master them. NRCA's balanced assessment system will enable the school to track overall mastery of the standards for each grade level. Teachers will receive extensive training on the use of the GVC to guide instruction, create effective lesson plans, and track mastery to ensure readiness to transition to the next grade level. To further ensure students are on pace for mastery, teachers will plan and schedule learning objectives aligned to the PDCA model described in Appendix O.

Report cards serve to keep parents informed of their child's academic growth and will be distributed quarterly and available via the parent portal. The report card provides a comprehensive overview of the students current skill level and a measure of progress toward attaining standards mastery. Interim progress reports are distributed to parents at the midpoint of each quarter. Since each assignment and assessment is directly aligned to state standards

and graded accordingly, a passing grade in the content area denotes that a student has attained an acceptable level of mastery. The report card, in conjunction with the child's PLP, will keep families more than adequately informed of each child's progress and readiness for promotion to the next grade level. Interventions and remediation described further in this application provide additional assurance that NRCA is taking appropriate actions to support all students in their academic success.

The academic goals tables included in Appendix O outlines identified performance levels as they relate to ELA and mathematics, as well as other assessments and indicators. As stated above, all grade levels can take into consideration multiple factors with regard to promotion and retention, including performance in all areas, as well as social and emotional readiness. This chart is a guide for teachers and administrators to appropriately target students who may be eligible for retention. The teacher, parent, MTSS representative, and principal will work together to ensure a plan is in place to prevent retention during the school year, but the ultimate decision for promotion or retention is made by the principal.

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

AOC

Research informs us that there is an instructional difference between annual growth for students who are on grade level, and catch-up growth for students that are below or significantly below grade level (Fielding, Kerr and Rosier 2007). Addressing literacy and reading for those who are multiple years behind grade level is not a single year process. In fact, it is only after 2 - 3 years of comprehensive reading instruction of more than 200 minutes per day that students begin to cross the threshold of grade-level performance (50th percentile). With this in mind, we intend to maximize instructional minutes to accommodate interventions and enrichment opportunities by exceeding the required 185 days of instruction, or instructional hour equivalent, with designated days for teacher professional development. This will help NRCA meet the needs of all students and accelerate learning in innovative ways in order to support the schools mission. The professional development days coincide with the legislative purpose of increasing opportunities for teachers to develop their craft and enhance their skills in the field. Professional development opportunities will be focused on topics that align with our mission of building a rigorous student-centered, data-driven learning environment, such as data-driven instruction, setting goals and tracking progress, critical thinking skills, and using technology to support learning within the classroom.

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

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

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



*progress and academic student growth.*

Teachers will differentiate instruction to reach all learners in each subject area, but there will be times when students need additional support to ensure they do not fall further behind. Diagnostic and benchmark assessments are used to identify skill deficiencies and monitor progress, such as Wonders diagnostic assessment, Fountas and Pinnells Benchmark Assessment System, and NWEA assessments. When students are not performing at expected levels, procedures are in place to ensure students are properly identified and placed into appropriate intervention programs to get them back on track for success. NRCA will follow the (Response to Intervention) RtI tiers listed below.

**Tier 1: Standards-Based Classroom Learning**

All students participate in general education learning that includes universal screenings to target groups in need of specific instructional and/or behavioral support; implementation of the North Carolina Essential Standards through a standards-based classroom structure; differentiation of instruction, including flexible grouping, multiple means of learning, and demonstration of learning; progress monitoring of learning through multiple formative assessments; and positive behavior supports.

**Tier 2: Needs-Based Learning**

In addition to Tier 1, targeted students participate in learning that is different by including a standard intervention protocol process for identifying and providing research-based interventions based on student need, and ongoing progress monitoring to measure student response to intervention and guided decision-making. Instruction occurs in small-groups in addition to the time allotted for core instruction.

**Tier 3: SST-Driven Learning**

In addition to Tier 1 and Tier 2, targeted students participate in learning that is different by including intensive, formalized problem solving to identify individual student needs; targeted research-based interventions tailored to individual needs; different curriculum resources; frequent progress monitoring; and analysis of student response to intervention(s). The time spent on instruction for Tier 3 students is in addition to the combined Tier 1 and Tier 2 amounts.

Depending on which tier the child falls under, NRCA will implement various interventions and increase the amount of instructional minutes provided. The following interventions are available:

- \* Differentiated RtI Block: Students are placed in various classes for a block of time to receive targeted instruction in either reading, math, or science depending on their levels and skill deficiencies.
- \* Push-in/Pull-out Instruction: Outside of their core classes, students receive intensive instruction based on their skill level.
- \* Tutoring/Extended Day: After-school small-group instruction utilizing a separate curriculum to reach the needs of the below-grade-level students.

The RtI block is provided to students for a set amount of time each day, but other interventions may be increased or decreased depending on the amount of support the child needs. For example, students can attend Saturday tutoring sessions or have multiple push-in/pull-out sessions during the week to catch up to grade level.

Teachers will create a Progress Monitoring Plan (PMP), which describes the current level of the students based on data from their assessments, the targeted interventions needed, the frequency in which the interventions will be administered, and the expected outcome or goal of the intervention. Parents, teachers, and administrators sign the PMP and the team reconvenes at least quarterly to monitor progress and review the plan. Teachers provide more frequent updates through parent conferences, informal conversations, and graded assignments.

Various programs are utilized within the interventions described above, which may include:

- \* Reading Plus
- \* Triumph Learning
- \* Lexia Reading
- \* Voyager Learning
- \* Reading Mastery

2. *Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:*

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

NRCAs program for ELL students prepares and successfully equips ELL students to fully participate, engage, and lead in their global community without a language barrier. To support our mission of providing a student-centered, data-driven learning environment, we will equip them with targeted instructional supports necessary to achieve mastery of the NC English Language Proficiency Standards as measured by the W-APT and Assessing Comprehension and Communication in English State-to-State (ACCESS) for ELLs 2.0. A structured English immersion methodology will be used at NRCA to fulfill this goal. This strategy has been shown to demonstrate the best results with ELL students.

ELL students will be identified in the initial assessments administered upon enrollment and through a Home Language Survey. Students will be selected to take the assessment if they are foreign-born or do not speak English in the home.

If students are language-minority students, they will be scheduled to be administered the W-APT within 30 calendar days of enrollment and the parent will be notified. If a student is tested and determined to be limited English proficient, the student will be tested annually.

Once the assessment results are collected, an instructional plan for students who qualify will be created, including the integration of scaffolding methods to address the ELL student and setting goals for achieving mastery of the NC English Language Proficiency Standards.

As prescribed by law, intervention that facilitates growth in English mastery while promoting content knowledge will be administered. To support literacy and proficiency, the ELL program provides English language

development instruction that is age and grade appropriate, and tailored to the students English proficiency level. The ELL program will be conducted in a climate that not only stimulates listening, speaking, and reading, but also writing. ELL students are offered instructional services through an English Immersion program mainstream/inclusion instructional delivery model. Instruction is supported through the use of ELL instructional strategies. In addition, the curriculum, textbooks, and other instructional materials used by ELL students will be comparable to those used by their non-ELL counterparts. Supplemental text and materials are also provided.

Mainstream/inclusion instruction is provided to ELL students equal in amount, sequence, and scope to the instruction provided to non-ELL students at the same grade levels, while also including specific accommodations and modifications to the curriculum. The PLP is used to show the areas of success and growth that the student maintains. The ELL strategies are documented in the teachers lesson plan as well as in the students PLP and ELL folder. ELL students have the added benefit of the schools use of differentiated, individualized instruction as described in Appendix O.

The ACCESS 2.0 is administered yearly to assess ELL students language proficiency. Once a student reaches proficiency in all four language domains of the assessment, as determined by DPI, he or she exits the program. The students academic progress is regularly monitored after exiting from the ELL program. Documentation, including the monitoring form and tool, is placed in the students ELL file. The language arts teacher will indicate if the student is making appropriate progress or if an ELL committee meeting needs to be held. During the ELL committee meeting, recommendations regarding the students progress, including placing the student back into the ELL program, can be made.

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

AOC

NRCA will welcome and encourage the enrollment of students with all learning profiles. During the school year, NRCA will systematically review data from a variety of sources which will allow the school to identify those students who are performing at higher levels. These data sources may include EOC/EOG assessments from the prior year, NWEA results, classroom assessments, and other informal measures. The data review will provide relevant information for instructional decision making rather than labeling, and will allow for teachers to appropriately differentiate instruction to meet the academic needs of these scholars.

All students at NRCA will have PLPs. The PLPs for these high performing scholars may reflect opportunities for enrichment based on the students areas of particular strength to enhance their abilities. Professional development will be provided to teachers on how to utilize differentiation strategies in their classrooms to further extend the learning of these

students. This is in alignment with NRCA's mission of building a student-centered, data-driven learning environment where students develop critical thinking skills.

Each quarter, teachers will analyze their students performance data. For NRCA's high-ability students, this analysis may result in identifying new enrichment areas. Within the framework of NRCA's Education Model, teachers determine the instructional focus, strategies, and curriculum resources to be used for enrichment during the six weeks between unit assessments. Thus, the learning plans for these students are continually monitored and adjusted as needed to foster student success.

### **Exceptional Children**

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

### **Identification and Records**

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

AOC

NRCA will identify students who have previously been found eligible for EC services/protected under Section 504 by:

1. Utilizing the Comprehensive Exceptional Children Accountability System (CECAS), or a comparable state system which tracks student information across school and district boundaries within NC.
2. Enrollment packet documentation requesting copies of IEP/504 and asking families to self-identify.
3. Requesting complete academic records from prior school to review for indicators of EC/504 designation.

A team is formed to collaboratively address the needs of students who display learning and/or behavioral challenges. The team will systematically monitor student progress and performance data and identify interventions to improve student performance. A student may be referred to the team by a teacher or at the request of the parent/guardian. This serves to ensure that all students suspected of having a disability and are in need of instructional accommodations and/or special education and related services

are identified, located, and evaluated. All students will participate in evidence-based instruction. A tiered system of interventions will be provided to help struggling students make progress.

Periodic assessments are conducted during the intervention period to evaluate whether the student is responding to the interventions and to determine if the strategies are successful. If successful, the team continues to monitor. If not, and evidence exists that shows a disability may be the primary cause of the students difficulties, the student is referred for an evaluation in accordance with state policy NC 1503.

After obtaining parental consent, a comprehensive evaluation is conducted by certified/licensed professionals who may be contracted for services. Testing includes all areas related to the suspected disability, such as cognitive functioning, academic achievement, psychological processing, speech/language skills, medical information, social/emotional functioning, and results from vision and hearing screenings. Once testing is complete, an eligibility meeting is held.

If special education/related services are necessary, an IEP is written. If the child needs accommodations, but not EC services, a 504 Plan is written. It is the responsibility of the IEP Team (parent, general education teacher, special education provider, evaluation specialist, and LEA representative) to make placement decisions and ensure that the students individual instructional needs are reflected in the IEP based on Free Appropriate Public Education (FAPE) and provisions of least restrictive environment.

In addition to cumulative files, separate files are maintained for EC records and 504 Plans. These files are accessible only by authorized individuals in accordance with state and federal policy. EC files will be organized with the most current IEP forms on top. The previous years forms are arranged chronologically in descending order, with initial placement documentation at the bottom of the file.

Record request forms will be used to request records from previous schools. Once the enrollment registrar receives this signed form from the parent, it is faxed to the previous school. If the records are not received in a timely manner, a follow-up process is followed with documentation of contact attempts. Student records are maintained in locked cabinets in a secure area of the school. We will comply with Family Educational Rights and Privacy Act (FERPA) and state policies related to reading, inspecting, and copying a student's educational records. All school employees will receive training, at least annually, related to the confidential nature of student records. NRCA's EC contact will receive training on the use of the Compliance Checklist published by DPI. This will be used as a self-evaluation tool. Should areas of non-compliance be noted, the school will take necessary steps to correct them.

### Exceptional Children's Education Programming

- 1. Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
- 2. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*

3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
4. *Describe the proposed plan for providing related services.*

For students who are performing below grade level, provisions of reasonable supplementary supports and services and/or modifications and accommodations are provided to ensure that they achieve the NC Standard Course of Study and NC Extended Content Standards.

Teachers use scaffolding and provide students with direct instruction, modeling, guided practice, and independent practice. Small groups are used for more individualized instruction when necessary with additional support provided by EC staff or instructional coaches when needed.

Based on benchmark assessment data, students may receive additional instruction and practice on identified skills. Teachers provide additional instruction outside of the standard instructional block through content area integration, during enrichment activities or lunch, and any other opportunity to support student achievement of individual learning goals.

We will meet the individual needs of students who, based on diagnostic data, are identified to have significant skill deficiencies and/or read two or more years below grade level through additional instructional minutes using a research-based intervention program. Students receive additional instruction in a small-group setting with more frequent progress monitoring to ensure accelerated progress toward grade-level expectations.

Teachers with NC Exceptional Children certification will serve students meeting the eligibility criteria for EC as specified in the students IEP. Based on the enrollment of students with disabilities, we will hire and train the appropriate number of teachers/paraprofessionals to ensure adherence to federal and state guidelines for class size and caseload and ensure all necessary IEP services are being implemented.

Licensed/certified vendors will be contracted to provide special education and related services. The students IEPs determine the specific services that will be contracted. Students with disabilities whose IEPs demonstrate the need for special education or related services are served in the regular classroom or EC setting, as determined by the IEP Team through consideration of the least restrictive environment based on the individual students need. The Lead EC Teacher ensures that students are scheduled in a manner that allows for implementation of the services identified on each students IEP.

EC services are provided through a model of inclusion for all students with disabilities in the least restrictive environment as determined by the IEP Team. A full continuum of special education and related services will be offered to meet the needs of students with disabilities. Students are educated in an EC setting only if the nature and severity of the students disability is such that education in general education classes with the use of supplementary aides and services cannot be achieved satisfactorily.

EC teachers and general education teachers collaborate with regard to lesson planning and implementation and student progress. Related service providers

will also collaborate with the students EC and general education teachers. This ensures that all teachers working with EC students are focused on meeting student needs as well as student growth and goal attainment. We will comply with state policy NC 1501 to ensure that students with disabilities receive a FAPE. A full continuum of services will be provided to meet the needs of enrolled students. Decisions related to addressing the needs of students with disabilities are made through the collaboration of a team. For students with an IEP, this team will consist of the students parents, the student if appropriate, EC provider(s), general education teachers, and the LEA representative. For students protected under Section 504, a team of no less than three individuals who know the student, have knowledge about the students disability, and are knowledgeable about instructional aids/accommodations form the collaborative decision-making team. Families of students with disabilities are provided with written procedural safeguards in the native language of the parent(s), unless it is not feasible to do so, in order to notify and make parents aware of their rights and responsibilities. If a written document in the native language of the parent(s) is not available, the explanation of the notice is given orally or in a manner of communication the parent(s) understand. Personnel at the school will ensure that the parent(s) understand(s) the information.

To ensure the provision of FAPE, personnel at the school consider whether the student requires assistive technology devices in order to access education. The need for extended school year services will also be reviewed and provided to students if determined necessary by the students IEP Team. Steps are also taken to provide nonacademic and extracurricular services and activities to students with disabilities by providing supplementary aids as appropriate and necessary. Additionally, staff members responsible for student discipline receive training on FAPE requirements to ensure that state policies are followed related to the discipline of students with disabilities.

Teachers and EC service providers are responsible for implementing each student's IEP. Providers maintain service logs to reflect the delivery of services indicated on each student's IEP. Teachers and service providers are involved in progress monitoring to assess the progress each student is making toward his/her IEP goals. This information is communicated quarterly to the students parent/guardian or more frequently if feedback is requested.

In addition, classroom teachers remain in contact with relevant stakeholders by updating the students PLP, using data derived from ongoing progress monitoring and interim testing results.

Vendors are contracted to provide EC and related services including but not limited to speech and language services, occupational therapy, physical therapy, and school psychology evaluation services. The students IEPs determine the specific services that are contracted. All contracted providers are required to be appropriately certified/licensed based on State Board of Education requirements. In addition, contracted providers are required to maintain professional liability insurance. During the summer prior to NRCA's opening, IEPs of enrolled students will be reviewed to determine which of these EC contracted services are needed and to finalize contracts to allow services to be in place at the start of the school year. The Lead EC Teacher ensures that students are scheduled in a manner that

allows for implementation of the services identified on each students IEP.

All clinicians will comply with FERPA and provide a range of services including evaluation, participation in team meetings, development and generation of the IEP/Section 504 plan, treatment and remediation, and collaboration with school staff.

### **Student Performance Standards**

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

NRCA will administer the NWEA MAP, or a comparable assessment instrument, three times per year to track student growth in grades K - 8. The nationally normed MAP provides RIT (scale) score growth targets in math, ELA, and science. Each fall, NWEA provides students with a nationally normed spring RIT target representing the average fall to spring growth of students nationwide at their grade and RIT level, thus ensuring that each student has a growth target unique to his/her academic needs. More than 50% of students in each grade-level will meet or exceed their spring RIT growth targets in math, ELA, and science annually exceeding the national average. All students with fall and spring scores will be included in NWEA's grade-level calculations of "Percentage of Students who Met or Exceeded their Projected RIT."

In NC's SPG calculation, 80% or more of an elementary and middle schools final grade is determined by student proficiency on the EOGs/EOCs. The remaining 20% is determined by a value-added growth model. NRCA's dual focus on proficiency and growth aligns to the states accountability expectations. Based on the September 2018 release of SPG data, NRCA-area schools combined scored an estimated 70 on the SPG performance component for 2017-18, the culmination of their EOG reading (67%), EOG math (67%), and EOG science (78%) scores. This approximates the performance of NRCA's expected student population as of 2018. For example, applying the schools goal of a 2% increase in the number of students who are Proficient on the Reading and Science EOGs, and a 2.7% increase in the number of students who are Proficient on the Math EOG, would produce a Year 5 performance component goal of 77.

For a list of the NRCA-area schools included in the above calculation and a table of SPG goals by year, please see Appendix O.

NRCA will adhere to all state accountability and testing requirements, including administration of state math, reading, and science assessments, currently the READY End-of-Grade and End-of-Course Assessments. NRCA will



also administer any alternative assessments as appropriate. Third grade students who do not pass the 3rd grade reading EOG, and do not meet any of the good cause exemptions outlined by the state will take the Read to Achieve test. NRCA's balanced assessment system will contribute to a common understanding of the assessment tools and data needed to continually make informed instructional decisions and ensure learner needs are not ignored or subject to ineffective assessment measures. To ensure the adequate progress and preparation for every student, the following assessments are included in the schools balanced assessment system:

- \* Formative (Ongoing): Frequent check-ins to assess student learning as it happens (exit tickets, graphic organizers, classroom polls, class discussions). When used effectively, results drive instruction and improve learning by identifying those students in need of support and enrichment.
- \* Benchmark(1 - 3 per year): "In time" evaluations of student mastery on common grade-level standards. Timing of assessment provides valuable "early warning" information and feedback. Teachers adjust instruction as a result of student performance.
- \* Interim (3 per year): "In time" evaluations of student progress on a consistent scale to evaluate student learning (growth). Timing of assessment provides valuable "early warning" information and feedback. Teachers adjust instruction as a result of student performance.
- \* Summative (1 per year/semester/unit): "Sum-up" learning at the end of a unit, semester or year to document achievement. The availability of results typically does not provide teachers with timely information to reteach or make mid-course corrections, and does not inform a students current needs. Valuable as oversight for school leaders, districts, and states.
- \* Baseline (Ongoing): Analyze evidence and data before teaching occurs to identify what students know and where gaps are. A list of baseline assessments can be found in Appendix O.
- \* EL/ELL/ESOL: Assessments to measure the fluency of students who are still developing their proficiency in the English language.

In addition to the assessments described above, formative assessments used in the classroom may include:

- \* Achievement of goals and objectives in the students PLP
- \* K-2 Skills Checklists (NWEA)
- \* MAP Skills
- \* MAP Reading Fluency
- \* EasyCBM
- \* Fountas & Pinnells Benchmark Assessment System
- \* Oral Reading Fluency Checks
- \* Journals/Interactive notebooks
- \* Teacher observations
- \* Anecdotal records of the students performance
- \* Tools within instructional software programs

NRCA's use of a research-based, data-driven Education Model provides the structure and accountability necessary for the continuous monitoring and analysis of the academic program. The data is used to develop PLPs and PMPs to ensure students are on track to master the required standards. This data is analyzed during weekly or bi-weekly data chats to determine action steps to help students improve, or make adjustments in schoolwide initiatives.

Students are expected to meet adequate levels of performance in reading, writing, mathematics, and science for each grade level. These levels of performance are used to identify students who must receive remediation, and may be retained. No student may be assigned to a grade level based solely on age, or other factors that constitute social promotion. Various indicators are used to determine performance levels, including but not limited to; multiple measures using appropriate grade level assessments, and teacher judgment. Teacher judgment factors may include, but are not limited to the following:

- \* Previous retentions
- \* Observations
- \* Checklists
- \* Student portfolios
- \* Classroom assessments
- \* Current grades

Teachers, parents, and the principal will work together to ensure a plan is in place to prevent retention during the school year. Students in grades 3-8 also take end-of-year state assessments in reading, math, and science in order to provide more evidence for evaluating student performance. Third grade students who do not pass the end-of-grade assessment for reading are subject to additional requirements under the state's Read to Achieve law. The ultimate decision for promotion or retention is made by the principal.

Middle school students in grades 6, 7, and 8 are required to achieve a grade of "D" or higher in English language arts, math, science, and social studies in order to be promoted to high school. Students in grades 6 and 7 who fail a subject will have the opportunity to participate in course recovery. Middle school students will also take an elective and physical education course at each grade level, but those participating in course recovery or intensive reading or math will waive their elective course.

Unless a special education student is on an alternative curriculum per the student's IEP, that student is held to the same policies in effect for general education.

Promotion criteria is communicated to parents at the start of the school year. Parents are kept informed of their child's progress formally in writing twice quarterly: once via a progress report at mid-quarter, and secondly via a report card distributed at the end of each quarter. Parents are also notified of their child's assessment scores after each administration. They will have constant online access to their child's grades through PowerSchool, and may schedule conferences and contact the teacher as necessary. After the first indication that a student is below grade level and may be "at-risk" for retention, the teacher develops a PMP, which is signed by the students parents or guardians. The PMP is updated in writing at least quarterly, with progress communicated more frequently in an informal manner.

### **Student Conduct:**

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

charter school.

Be sure to include:

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

NRCA will actively work to establish a school culture in which academics, a sense of community, and innovations flourish. The school will leverage the focus on Core Fundamentals impacting school culture to ensure equity, positive interactions, academic success, and the healthy development of students as well-rounded individuals.

The Code of Conduct is provided to parents and students at the beginning of the school year to ensure all families are aware of behavior expectations and consequences, due process and grievance procedures. It outlines and defines the infractions that may lead to in-school consequences, suspension and/or expulsion. Depending on the severity and situation of each case, the following offenses may lead to a consequence ranging from in-school disciplinary action to suspension/expulsion:

- \* Infractions of class/school rules
- \* Contraband items (i.e. lighters, matches)
- \* Integrity (i.e. cheating, forgery)
- \* Trespassing
- \* Inappropriate interpersonal/sexual behavior (including harassment)
- \* Disrespect and noncompliance
- \* Use of electronic devices
- \* Gambling
- \* Harassment, abusive, offensive language
- \* Bullying
- \* Hazing
- \* Physical, written, or verbal aggression, or threat of
- \* Unjustified activation of a fire alarm or other system
- \* Theft or destruction
- \* Possession of weapon, tobacco, narcotics, alcohol, or controlled substance

All discipline decisions, especially those related to students with disabilities, will be determined on a case-by-case basis. NRCA will adhere to all federal and state laws regarding discipline of all students, including students protected under IDEA and 504 legislation. To the extent that they also take such action for children without disabilities, NRCA personnel may, for not more than 10 school days in a row, remove a child with a disability who violates a provision of the Code of Student Conduct from his or her current placement to an appropriate interim alternative educational setting, another setting, or suspension. Additional removals of the child of not more than 10 school days in a row in that same school year for separate incidents of misconduct may be imposed, as long as those removals do not constitute a change of placement. Once a child with a disability has been removed from his or her current placement for a total of 10 school days in the same school year, NRCA will provide, during any

subsequent days of removal in that school year, services to the extent required.

A principal may impose a short-term or long-term suspension when a student willfully engages in conduct that violates a provision of the Code of Student Conduct authorizing such consequences. For short-term suspensions, the student will be provided an informal hearing including the basis for the accusations and the opportunity to respond to the charges. The principal may impose a short-term suspension without providing the student a hearing if the presence of the student creates a direct and immediate threat to the safety of other students or staff, or substantially disrupts or interferes with the education of other students or the maintenance of discipline at the school.

The Board will provide the student a hearing before imposing a long-term suspension. The principal will provide notice to the student's parent of the long-term suspension recommendation. Long-term suspension hearings shall be conducted in accordance with state law and students will be provided procedural due process.

Upon recommendation of the principal, the Board may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff. Prior to the expulsion of any student, the Board shall conduct a hearing. The student shall be given reasonable notice of the recommendation in accordance with the provisions for long-term suspensions as well as reasonable notice of the time and place of the scheduled hearing.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
The instructional program is detailed and ambitious. Will your school utilize academic deans or coaches to ensure teachers can meet the high expectations of this plan? Will teachers be allotted adequate planning time to allow the implementation of this plan?	Ashley Baquero	Instructiona
It is not clear on the exact curriculum that will be used. All curricula should be guaranteed and viable. Please clarify. What makes the curriculum you are using guaranteed and viable?  Where does technology fit in the instructional program? It is mentioned how technology is used to support student learning (remediation or reteaching) but it is not described how it is used to engage students in rich use of technology. What sets North Raleigh apart in their incorporation of technology? How is blended learning incorporated with no student computers in the budget?  Please clarify what the "Plan-Do-Check_Act model" looks like?	Jessica Whalen	Instructiona
Applicant needs to clarify: What assessments will be used to diagnose/determine students mastery against the standards?  Applicant needs to clarify: Is there a specific curriculum that the school will be using?	Kristen Parker	Instructiona
Please clarify: "With monitoring from the classroom teacher, students can take courses online through Plato for enrichment or course recovery." What does this look like? When does this occur?  What support is offered for teachers to implement "Dr. Marzano's 13 high-probability instructional strategies" if they are struggling to implement them?  How are teachers supported in cross-curricular instruction?  When will "students of different ability levels work jointly to improve their understanding of a subject" if classes are based on abilities? When will this occur?  Please detail further the following: "To further ensure students are on pace for mastery, teachers will plan and schedule learning objectives aligned to the PDCA model described in Appendix O"  How will ED parents or families with no internet access access report cards through the parent portal online?	Jessica Whalen	Curriculum a
Please provide more information to what a typical day looks like and the incorporation of tier support system, success time?  How will low income students be accommodated to ensure participation in Saturday tutoring or extended days? Who is carrying out these types of interventions?  How does the RtI block affect classroom instruction? When will it occur?  How will you decrease burn-out with students/parents with all of this after school and weekend tutoring?  What supports are in place to ensure low income parents are able to come in at least quarterly for monitoring plans and parent conferences?  Who conducts/monitors the ELL program?  Please provide more detail and clarity in how ELL students who exit ELL program are monitored?	Jessica Whalen	Special Prog

<p>Please clarify who consists of the "team that is formed to collaboratively address the needs of students who display learning and/or behavioral challenges."</p> <p>Who is responsible for making IEPs?</p> <p>"Periodic assessments are conducted during the intervention period to evaluate whether the student is responding to the interventions and to determine if the strategies are successful." Who makes and through what platform are these assessments made? How long is the intervention period and what is the resulting determination from this period if strategies are successful or not? Need additional clarity.</p>	Jessica Whalen	Exceptional
<p>The application indicates "Small groups are used for more individualized instruction when necessary with additional support provided by EC staff or instructional coaches when needed." What are the components of the full continuum of service delivery? How does your school plan to provide those components? The personnel budget indicates one EC staff. How will one person provide the full continuum across all grade levels?</p>	Robert McOuat	Exceptional
<p>Please clarify the following: "Teachers provide additional instruction outside of the standard instructional block through content area integration, during enrichment activities or lunch, and any other opportunity to support student achievement of individual learning goals." What does content integration look like? What does this mean for struggling students and their enrichment blocks? How will lunch or this particular block be affected if students may always need additional help?</p> <p>How often does the collaboration between EC teachers and general ed teachers occur? Does this include contracted EC teachers as well?</p> <p>Who makes up the team that form the collaborative decision making team for students protected under Section 504?</p> <p>How will you ensure one EC teacher adequately serves 61-62 EC students?</p>	Jessica Whalen	Exceptional
<p>Applicant needs to clarify: What assessments will you use to gain an understanding of what students have/have not mastered in regards to standards already taught throughout the year? MAP assesses and adapts to where a student is and can show growth but not directly in relation to the standards taught.</p>	Kristen Parker	Student Perf
<p>There is a great emphasis on assessments and data, how will NCRA deal with and decrease burn-out or too much testing stigma?</p> <p>Who conducts the weekly or bi-weekly data chats? Who is responsible for analyzing the data?</p> <p>What electives are offered?</p> <p>How is course recovery conducted?</p>	Jessica Whalen	Student Perf
<p>This section was the first section that detailed a sense of community. How is this evident from day to day at NCRA?</p> <p>How will NCRA deal with behavior that is still disruptive but not worthy of suspensions/expulsions?</p> <p>Please clarify the following: "All discipline decisions, especially those related to students with disabilities, will be determined on a case-by-case basis. NRCA will adhere to all federal and state laws regarding discipline of all students, including students protected under IDEA and 504 legislation. To the extent that they also take such action for children without disabilities, NRCA personnel may, for not more than 10 school days in a row, remove a child with a disability who violates a provision of the Code of Student Conduct from his or her current placement to an appropriate interim alternative educational setting, another setting, or suspension. Additional removals of the child of not more than 10 school days in a row in that same school year for separate incidents of misconduct may be imposed, as long as those removals do not constitute a change of placement. Once a child with a disability has been removed from his or her</p>	Jessica Whalen	Student Cond

current placement for a total of 10 school days in the same school year, NRCA will provide, during any subsequent days of removal in that school year, services to the extent required." When does the manifest meeting happen?		
Who conducts and/or is a part of the informal hearings for short term suspensions?		
Please explain further Core Fundamentals.	Jennifer Gnann	Student Cond
Would infractions of school rules not have to be "repeated" offenses to reach the severity necessary to be considered for suspension/expulsion?	Shannon Stein	Student Cond

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Tammi Sutton	
Ashley Baquero	Pass
Bruce Friend	
Cheryl Turner	
Danielle Allen	
Steven Walker	Pass
Heather Soja	Pass
Jennifer Gnann	Pass
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Robert McQuat	
Jessica Whalen	Fail
Phyllis Gibbs	
Lynn Kroeger	
Kristen Parker	Pass
Lindalyn Kakadelis	
Joe Maimone	
Alan Hawkes	

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

(No more than ten total pages in this section)

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

##### **Governance:**

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

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

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

*Name of Private NonprofitMunicipality:* Triangle Charter Education Association

*Mailing Address:* 11408 Lostwood Lane

*City/State/Zip:* Raleigh NC 27614

*Street Address:* 11408 Lostwood Lane

*Phone:* 919-757-2343

*Fax:*

*Name of registered agent and address:* Allen Taylor, Jr.

11408 Lostwood Lane

Raleigh, NC 27614

*FEDERAL TAX ID:* 90-1031905

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

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

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

No

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

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

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

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



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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these professional licenses?</b>
Allen Taylor	President	WAKE	Marketing Executive	N/A	N
Elaine Shamel	Vice President	WAKE	Retired Educator	NC Teaching License	N
Drew Baumgartner	Treasurer	WAKE	Corporate Development	N/A	N
Megan Christie	Secretary	WAKE	Parent	N/A	N
Lee Teague	Director	WAKE	Lobbyist/Consultant	N/A	N
Alex Krawchick	Director	WAKE	Founder/CEO	N/A	N

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

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

AOC

NRCA will be governed by the Triangle Charter Education Association, Inc. We have partnered with CSUSA and plan to implement their educational and operational model. The Board understands our responsibility as board members for developing and outlining the mission, vision, and values of NRCA and developing the appropriate policies to ensure those fundamentals are maintained. We shall be responsible for NRCA's legal and financial obligations and will ensure that the schools programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements. We will continue to uphold the mission and vision of NRCA through visible leadership and stewardship, including the following:

- \* Communicating NRCA's mission and vision to the community
- \* Holding CSUSA accountable for achieving NRCA's mission and vision
- \* Participating in fundraising and other community events on behalf of NRCA
- \* Setting, approving, and monitoring the school budget
- \* Reviewing and approving the monthly financials, making adjustments as needed
- \* Reviewing school performance
- \* Monitoring NRCA's overall health and viability

- \* Communicating with the community and state Board of Education
- \* Monitoring progress toward goals
- \* Operational oversight of CSUSA
- \* Hiring of teachers
- \* Strategic planning
- \* Ensuring compliance with all local, state, and federal reporting requirements

Under the terms of the management agreement, CSUSA shall consult with the Board with respect to the hiring of the principal. NRCA will use a robust recruiting process called the Leadership Assessment Center. This process is used to determine if a candidate would be a good building leader and is an important component of the interview process. Qualified candidates participate in this 1-day event, which includes a Data Analysis Performance Task, a Character Survey/Essay, and at least two interviews with CSUSA lead principals and regional directors. Candidates that participate in this event may be invited into the pool of approved candidates for consideration. The Board is included in the final decision-making process in an effort to support a positive working relationship between the principal and the Board. The principal will be employed by and report directly to CSUSA. A strong relationship will exist between the principal and the Board. The Board will ultimately hold the principal accountable through the performance expectations defined by the Board and through the management agreement between the Board and CSUSA. The principal will provide a status report for the Board at monthly meetings which will include educational, enrollment, personnel, technology, facility and various other operational reports. The principal will attend all Board meetings and field any questions of the Board members and conduct follow-up action items as necessary. Board members will be given the opportunity to provide input on the principals performance and CSUSA will remove the principal if the Board is reasonably dissatisfied with his/her performance.

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

The Triangle Charter Education Association, Inc. is currently a 6-member board comprised of local leaders who are committed to providing quality educational options in Wake County. The Boards demonstrated capacity includes strong community, financial, business, marketing, educational and operational experience.

Our board is focused on maintaining members who hold the same heartbeat of the school's mission, reflect the commitment to the community, and have the ability to provide board governance duties as a whole. Our bylaws give us the ability to expand up to a total of 9 members. We plan to expand as qualified candidates are identified.

Board members cannot formulate or implement policy on an individual basis, and all decisions must be made collectively in accordance with Board procedure.

Monthly Board meetings will be publicly noticed on NRCA's website as well as at the school. Parents are welcome and acknowledged, and public comment is encouraged at each meeting. The Board will follow up with the principal and CSUSA when needed to ensure complaints and suggestions are handled properly and timely. Monthly board meetings include a detailed principals report and financial reports to be evaluated by the Board in partnership with CSUSA.

The Board evaluates the success of NRCA and the principal by continuous monitoring, which includes quarterly and semi-annual surveys and active and effective representation of all stakeholders to ensure that the school will be an educational and operational success.

NRCA will have a Parent Teacher Committee (PTC) that will meet on a regular basis. The PTC will work closely with school administration and the Board to identify opportunities for school programming, fundraising, and special events to meet the needs of the school and its students. Given the areas of expertise represented by the Board members, the active parental participation through the PTC, and the day to day oversight of CSUSA, there will be active and effective representation of key stakeholders.

The President presides at all meetings of the Board. The President signs, with any other proper Officer, instruments which may be lawfully executed on behalf of the Corporation, except where required or permitted by law to be otherwise signed and executed, and except where the signing and execution is delegated by the Board to some other Officer.

The Vice President exercises the powers of the President during that Officer's absence or inability to act. The Vice President holds these powers and performs other duties as assigned by the President or the Board.

The Secretary is responsible for keeping the minutes of the Board meetings and ensuring that all meeting notices are provided in accordance with the provisions in the Board's bylaws or as required by law. The Secretary maintains general charge of the corporate books and records.

The Treasurer has charge and custody of and is responsible for all funds and securities of the Corporation; keeps accurate books and records of receipts and disbursements; deposits all moneys and securities received by the Corporation in such banks, trust companies, or other depositories as selected by the Board; and sees that all required corporate filings are made.

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

Triangle Charter Education Association Inc. board members have been organized since December 2012, and currently hold the charter for Cardinal Charter Academy (opened August 2014). The founding board members were joined together through the efforts of the board chair; Allen Taylor, Jr., who was instrumental in holding several organizational meetings with individuals in the community that had an interest in bringing a high quality charter school option to Wake County. Board members were selected based on their educational and/or business experiences with an effort to ensure that all areas of oversight are met (financial, educational, and operational). Our

Board is focused on maintaining members who hold the same heartbeat of the school's mission, reflect the commitment to the community, and have the ability to provide board governance duties as a whole.

Vacancies on the Board will be filled at the annual meeting of the board by a vote of a majority of the directors then in office. The annual meeting is scheduled to take place in March of each year. However, if a vacancy results in the Board having less than five members or it is otherwise determined that it is desirable and in the Boards best interest to fill a vacancy before the next annual meeting, then a board recruitment/selection committee shall be formed by at least two board members to search for qualified candidates to present to the entire board for consideration. Any two members of the board may call a special meeting for the purpose of filling the vacancy. The vacancy may then be filled at a special meeting by a vote of the majority of the board members then in office.

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

The Board meets on a monthly basis with our annual meeting held in March and a strategic planning workshop in October of each year.

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

AOC

The orientation training and professional development of existing and new board members will be provided throughout the year by the Boards legal counsel and also through CSUSA's Board Governance team. To ensure board members are effective in their role, they receive training on a variety of topics. Proper orientation ensures desired continuity of NRCA's mission and goal attainment. New board members receive an orientation and are given a thorough review of the charter application, charter contract, Articles of Incorporation and Bylaws and any other applicable governing documents. Professional development also includes attendance at annual charter school conferences and regional workshops offered by the NC Public Charter Schools Association, the Charter School Initiative, and other charter school organizations. Below is a timetable covering training and professional development to be provided:

\* April through June: Roles of the Board, Parliamentary Procedure, Drafting Board Policies

\* July through September: Review of Open Meeting Laws, Reading a Financial Statement

\* October through December: Charter School Law, Guided Questions for Mission Statement and Strategic Planning

\* January through March: Models of Governance and Leadership, Review of Bylaws

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

AOC

Triangle Charter Education Association Inc. has an existing Conflict of Interest Policy in place. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest

applicable to nonprofit and charitable organizations. A board member must inform the Board of any direct or indirect conflict of interest which the member has with regard to any transaction contemplated by the Board. A conflict of interest shall exist in board actions including, but not be limited to, actions concerning a transaction in which the member: (a) has a material financial interest; or (b) is presently serving as a director, trustee, officer, or general partner of another party. Pursuant to the provisions of Section 55A-8-31 of the North Carolina General Statutes, the board member with a conflict of interest may participate in the discussion, but may not vote on the transaction. The transaction is authorized, approved, or ratified by the vote of a majority of the board members who have no conflict of interest (which must be more than one member) and when a majority of members who have no conflict of interest so vote, a quorum is deemed to be present at the meeting for purposes of that vote. There are no existing relationships that could pose actual or perceived conflicts of interest if the application is approved. Board members will have no financial interest in the school. In addition, board members are independent of CSUSA and no employees of CSUSA will sit on the board.

The Board may not enter into a contract with a related person to the extent that such contract and any related transfers might cause or imply private benefit under the relevant sections or applicable provisions of state ethical requirements for local government officials.

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

The Board has policies in place for our existing school, Cardinal Charter Academy. We will develop policies with the support of the principal, school staff, and legal counsel (when necessary). All policies will be created after researching best practices and using proven systems to guide our work. When appropriate, parent focus groups will be formed to gather input. Policies will be presented to the full board to allow for open discussion and collaboration at a public meeting and then brought to a vote for approval. Policies will be provided to parents via the Student Handbook and will also be made available through the student information system. Policies will be reviewed annually to ensure compliance with federal and state law as well as local regulations and policies.

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

AOC

A Parent Teacher Committee will be established each year to provide a voice for parents and community input that can be used in the development of school programs. The Board believes that active parental participation is essential to operating high quality charter schools. Parent participation is the key to the success of the overall program and will be solicited for the development of school goals and objectives. The PTC will be organized each school year and comprised of parents of enrolled students, administrators, and teachers. The PTC will report directly to the principal.

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

Parents may bring complaints to the school administration at any time. It is the responsibility of the leadership team to work to understand the concern. Academic concerns should first be discussed with the teacher. If the parent determines that the concern has not been adequately addressed, then the

parent must make an appointment with a member of NRCA's administration. If ample time is given to address the concern and the parent has determined that the concern has not been addressed after a discussion with administration, then the parent may contact CSUSA. If the grievance is not resolved through the school administration or CSUSA, the parent may appeal to the Board. It is our desire, in partnership with CSUSA, to create the best learning environment for each student, including working to resolve concerns parents have regarding their child's academic environment.

When a staff member believes a work condition or treatment is unjust, inequitable, or a hindrance to effective operation; he or she is encouraged to discuss the condition or treatment with school administration. School policy provides for alternative lines of communication when the employee has such issues with his or her direct supervisor. If the teacher or staff member feels he or she has been treated unfairly as a result of actions from the schools administration, the employee can present a formal grievance to CSUSA Corporate Human Resources Department and a further investigation will be conducted. CSUSA will report violations of ethics or misconduct as required or deemed necessary. Misunderstandings or conflicts can arise in any organization and should be resolved before serious problems develop. Most incidents resolve themselves without formal intervention. However, should a situation persist that the employee believes is detrimental to himself/herself or the Board, the employee should follow the procedure described here for bringing the complaint to school administration and/or CSUSA Human Resources Department's attention. If the aggrieved employee is not satisfied with the outcome, the employee may request a review of the matter by the Board. The Board will review the written documentation and in consultation with the administration and CSUSA, will issue a final written decision.

NRCA will follow the Boards approved Grievance Policy, which is currently in place for Cardinal Charter Academy.

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

#### Include in the Appendices:

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

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

*If the proposed school does not intend to contract with an education service provider, mark "Not Applicable"*

**and follow the direction #3 in the Application Specifications.**

**Not Applicable**

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

Name of the Company: Charter Schools USA  
Address: 800 Corporate Drive Suite 700  
Fort Lauderdale FL 33334  
Website: [www.charterschoolsusa.com](http://www.charterschoolsusa.com)  
Phone Number: 770-500-9037  
Contact Person: Sandy Castro  
Fax: 954-416-4027  
Email: [scastr@charterschoolsusa.com](mailto:scastr@charterschoolsusa.com)

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

The Board has an existing agreement with CSUSA to manage Cardinal Charter Academy. We were pleased with the successful opening of our first school and the support services we have received from our educational partner and look forward to working with them in developing and operating additional schools.

We have observed, through site visits to CSUSA-managed schools and also by attending their annual Summit, that CSUSA manages schools with a personal mission by providing the most consistent and research proven instruction. They excel at teacher training and support and above all have an exceptional educational program.

CSUSA's assistance in marketing our initial school has exceeded our expectations. Our first school was fully enrolled with a large waiting list. CSUSA delivered a state-of-the-art facility on time and our teachers and students had all the resources needed on day one. Its Education Team worked closely with the principal to ensure all textbooks and curriculum resources were ordered and teachers were properly trained. Its Finance Team worked closely with our schools business manager to ensure all reporting systems were in place.

There is a reporting mechanism in place for educational, financial, and operational updates during monthly board meetings, and a support team at CSUSA works closely with our school staff and administration to ensure we are on task and working toward meeting our educational and financial goals.

Our relationship with CSUSA is governed by a performance-based management agreement. The Board has engaged Donna Rascoe, Esq. as independent legal counsel and has been working with her since the Boards inception. Board members have worked closely with legal counsel to review and negotiate the terms of the management agreement prior to execution (see Appendix I).

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

*this proposed school.*

The Board currently contracts with CSUSA to operate Cardinal Charter Academy (opened in August 2014). We have been working closely with CSUSA's development, education, finance, and operations teams and are satisfied with the delivery of services, and we plan to continue this partnership with CSUSA for our future schools. We have not recently compared CSUSA to other EMOs due to our existing relationship and level of satisfaction with their delivery of services.

CSUSA has a large support staff that provides services across all areas of expertise needed to successfully operate a charter school. This includes a team of Regional Directors and Managers, encompassing Finance, Education, Facilities, Operations, Marketing, Enrollment and Human Resources. Throughout our partnership with CSUSA for Cardinal Charter Academy, CSUSA has worked closely with us to support the infrastructure needed to ensure adequate school resources.

3. *Provide and discuss student performance, governance performance and financial data from other schools managed by the management company to demonstrate how this organization is a good fit for the targeted student population. Nationally, what is the highest and lowest performing school of the EMO/CMO? Why are these two schools so different in overall achievement?*

CSUSA currently operates 83 charter schools in 6 states, serving over 70,000 students. All schools are AdvancED accredited. Over 60% of students receive free or reduced lunch, and over 70% are classified as minorities. Of the schools that receive traditional A-F grades, over 90% of those managed since 2011-12 earned "passing grades" (A, B or C) in 2017. Currently, only North Carolina and Florida have released 2017-18 accountability results and 100% of schools received an A, B or C letter grade.

For the 2015-16 school year, three schools managed by CSUSA in North Carolina (Langtree Charter Academy, Cabarrus Charter Academy, and Cardinal Charter Academy) outperformed both the state and their respective districts, averaging an advantage of 17% points in reading, 14% points in math, and 7% points in science over the state. Compared to their respective districts, these schools outperformed by an average of 12% points in reading, 8% points in math, and 3% points in science. The 16-17 school year brought a more diverse set of schools to CSUSA's portfolio. Three new schools were opened this year with about 43% of students receiving free or reduced price lunch, compared to an average 18% at existing schools. That being said, the last school year was one of challenges, even for existing schools, but there were areas where these schools excelled. Cabarrus Charter Academy out-performed a majority of local schools in reading, Kannapolis Charter Academy met or exceeded the performance of all of their local schools except one in reading, and Cardinal Charter Academy exceeded the average performance of local schools in their overall SPG score, overall performance and CCR scores, reading, and Math I. As of the most recent school performance grade results (2017-18), over half of the CSUSA-managed schools in NC met or exceeded state and district performance in math and reading EOGs, including Cardinal Charter Academy, who exceeded Wake County Schools by almost 5% points in math and almost 12% points in reading. Compared to the state, Cardinal Charter Academy exceeded the overall state performance by almost 12% points in math and almost 20% points in reading.



The three turnaround schools in Indiana are CSUSA's lowest performing. Managed since 2012-13, more than 90% of the students qualify for free and reduced lunch, and the student body is 53% minority. Collectively, the Indiana schools have made outstanding progress, far exceeding one year's annual growth on NWEA MAP assessments. In 2017, approximately 110% of growth targets were met in reading and 119% in math, the equivalent of over one year's worth of growth. School grades at the Indiana schools were markedly improved from prior years. Two schools earned passing grades for the first time in the last decade. Preliminary results for the 2017-18 school year are indicative of continued improvements.

Some of CSUSA's highest performing schools are in Florida, their most established state, with 60 schools in 14 school districts. The schools range from FRL populations of 1% to 100% and minority rates of 43% to 97%. For the 2017-18 school year, CSUSA-managed schools outperformed the state on ELA and social studies proficiency, learning gains in math and ELA, learning gains among the lowest 25% of students in math and ELA and graduation rate. When compared to each of the districts in which CSUSA operates more than one school, the CSUSA "district" of schools met or exceeded the learning gains among the lowest quartile of students in both math and ELA, in addition to the ELA gains, social studies proficiency and graduation rates\*. One hundred percent of CSUSA-managed schools in Florida earned a passing grade (A, B or C) in 2017-18, and 75% of schools open more than 3 years earned an A or B.

Please see Appendix K for individual school financial data.

\*The CSUSA graduation rate in Florida exceeded the graduation rates in all districts in which CSUSA operates a high school.

4. *Describe how the governance structure will be affected; if at all, by the EMO/CMO and particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.*

Our relationship with the EMO is codified with a performance-based contract. The executed management agreement in Appendix I outlines the duties and responsibilities of each party and the specific performance requirements of the EMO.

We will independently adopt a comprehensive budget on an annual basis, which will include all forms of revenue and all expenditures. Any and all budget amendments will require our approval. On a monthly basis, the EMO will provide a detailed accounting of all school revenues and expenditures. In addition, the EMO will report, on a monthly basis, the current student enrollment of the school and the number of students on the waiting list (if any). The EMO will provide monthly financials, which will include a statement of revenues and expenditures prepared in accordance with generally accepted accounting principles.

The EMO will be responsible for the daily financial management of the school, subject to the budget and oversight of the Board. The Board will be responsible for overall policies regarding NRCA's governance, academic, personnel, discipline, and grievance policies. It is our responsibility to hold the EMO responsible for the successful operation of the school and its ability to deliver academic results. This system of accountability ensures

that NRCA will be devoted to its mission of providing a rigorous educational program.

The principal will be responsible for implementing and enforcing all policies set forth by the Board. School employees will be responsible for, above all else, the delivery of NRCA's rigorous academic program. Teachers are jointly employed by both the Board and CSUSA, with the Board retaining ultimate authority over the hiring and firing of teachers. This relationship is described further in response to the next question.

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

Teachers will be jointly employed by the Board and CSUSA, and administrators and non-instructional staff will be solely employed by CSUSA. This arrangement is necessary for the administration of employee benefits and pay and does not reduce the Boards authority to hire and fire teachers, and complies with N.C.G.S., Article 14, 115C.

6. *Explain how the contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles.*

The management agreement outlines the EMO's responsibilities to the Board for the operation and performance of the school in accordance with the charter contract and the performance criteria outlined in this application.

The EMO's responsibilities to the Board include, but are not limited to:

- \* Timely submission of required reports as set forth in the management agreement and in the charter contract.
- \* Strict adherence to the approved annual budget for the operation and management of NRCA.
- \* Performance goals stated in the charter application and the charter contract.

The management agreement contains an article that outlines the reasons for which the Board may terminate the management agreement. Please refer to the management agreement attached as Appendix I.

7. *Is the facility provided by the EMO/CMO? N*

- If yes, include as Appendix J a detail of the buyout formula for the board of directors to purchase the facility if a buyout formula or process exists.

8. *List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.*

9. *Provide as Appendix K the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO, provide confirmation that the EMO is in good financial standing with either financial statements, bank letter, D & B report or credit rating.*

2017

- \* Cardinal Charter Academy FY17 audit fund balance: \$620,349.
- \* Cabarrus Charter Academy FY17 audit fund balance: \$3,241.
- \* Langtree Charter Academy FY17 audit fund balance: \$99,332.
- \* Iredell Charter Academy FY17 audit fund balance: N/A.
- \* Kannapolis Charter Academy FY17 audit fund balance: N/A.
- \* Union Prep Academy FY17 audit fund balance: \$32,706.

2016

- \* Cardinal Charter Academy FY16 audit fund balance: \$314,915.

- \* Cabarrus Charter Academy FY16 audit fund balance: \$344,379.
- \* Langtree Charter Academy FY16 audit fund balance: \$568,059.

2015

- \* Cardinal Charter Academy FY15 audit fund balance: \$160,900.
- \* Cabarrus Charter Academy FY15 audit fund balance: \$248,800.
- \* Langtree Charter Academy FY15 audit fund balance: \$336,900.

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

**X Not Applicable**

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

**Not Applicable**

1. The proposed charter school will be governed by an existing charter school board
2. Describe the rationale for replicating the application based upon the success of another charter school. Include documentation and evidence that the existing charter school model is successful in student achievement, charter school governance, and fiscal responsibility. Base this explanation upon academic data available through state and national summative assessments, financial audits, and state compliance reports.

Triangle Charter Education Association has an existing partnership with CSUSA. In partnership with us and other non-profit boards, CSUSA has successfully developed six NC charter schools: Langtree Charter Academy, Cabarrus Charter Academy, Cardinal Charter Academy, Kannapolis Charter Academy, Iredell Charter Academy and Union Preparatory Academy at Indian Trail. Langtree and Cabarrus opened in 2013, Cardinal in 2014 and Kannapolis, Iredell and Union in 2016. Students at these schools have exceeded county and state proficiency averages in many grades and subject areas. Cardinal Charter Academy, the school we are replicating, outperformed the state in overall performance by 12 percentage points and on college and career performance by just over 14 percentage points in math. In reading, Cardinal Charter Academy's performance exceeded the state by 20% points and 18% points respectively. Cardinal also surpassed its home district, Wake County Schools, by about 5% points in overall performance and college and career performance in math and 12% points overall and 8% points on college and career performance in reading. Success at these schools is due to the strength of the CSUSA Education Model and the fidelity of its application. In addition, the charter school governance and fiscal responsibility relationships make this a successful model to replicate. The boards exercise fiduciary responsibility, ensure accountability, and use best practices to ensure the budget and policies are aligned to the school's mission. The boards ensure that programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements. Each of the schools financial affairs is in good standing and has clean audits with unqualified opinions.

Please see Appendix A for tables that show Cardinal Charter Academy's performance and how it compares to both the state and the district.

3. Depict and analyze the current enrollment trends and student demographics of the replicated charter school model over the past three academic years.

The Board has chosen to continue working with CSUSA due to its ability to establish a replication model for a high-performing charter school in North

Carolina. Cardinal Charter Academy has just begun its fifth year of operation. It currently has 904 students enrolled in grades K 8. The current demographic data is as follows:

- \* American Indian/Native Alaskan: 5%
- \* Asian/Pacific Islander: 15%
- \* African American: 14%
- \* Hispanic: 9%
- \* Multi: 14%
- \* Other: <5%
- \* Caucasian: 47%

As shown by Cardinal Charter Academy, NRCA will comply with N.C.G.S. 115C-218.45(e). NRCA's student body will represent the area/community directly surrounding it. The trend of steady student membership at Cardinal Charter Academy can be seen from the data listed below.

2016-2017

- \* Enrollment: 1,058
- \* Wait Lists: 702
- \* New Applications Received: 1,118
- \* Recommitment (students returning for 2017-2018): 737

2017-2018

- \* Enrollment: 996
- \* Wait Lists: 682
- \* New Applications Received: 1,342
- \* Recommitment (students returning for 2018-2019): 628

2018-2019

- \* Enrollment: 904
- \* Wait Lists: N/A
- \* New Applications Received: 885
- \* Recommitment (students returning for 2019-2020): data not yet available

4. Explain why the governing board of the proposed charter school is a good fit for the proposed student population as noted in Section II Mission and Purposes.

Our Board is currently operating a school which serves a similar student population. We have developed a strong knowledge base of the academic, operational and financial matters required to successfully operate NRCA. Board members have a vested interest in the success of the school since NRCA will essentially be a replication of our existing school in Cary. Board members possess a thorough understanding of the demographics and population, and especially the desire of parents who want a quality educational choice option for their children.

5. Provide a copy of the organization's IRS Form 990 for the last three years as Appendix N

### **Projected Staff:**

*Below, please outline a list of positions anticipated for the charter school (e.g., principal/director,*

*finance officer, administrative support staff, teachers (part-time and full-time), paraprofessionals/teaching assistants, clerical, and maintenance). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings and align with the proposed budget.*

Administration

- \* Principal
- \* Assistant Principal
- \* School Operations Administrator
- \* Administrative Assistant
- \* Receptionist
- \* Enrollment Registrar
- \* Student Services Coordinator
- \* IT Support
- \* Data Coordinator
- \* Food Service-Director
- \* Food Service
- \* Before/Aftercare-Director
- \* Before/Aftercare

Instructional

- \* Teachers (K-5)
- \* Teachers (6-8) (Math, Sci, SS, ELA)
- \* General Music/Chorus Teacher
- \* Art Teacher
- \* PE Teacher
- \* Foreign Language Teacher
- \* Technology Teacher
- \* Instructional Aide - PE
- \* Special Education (EC / AIG)
- \* Special Education (EC / AIG) Aide
- \* Intensive Reading / Math
- \* Co-Teacher
- \* Curriculum Resource Teacher

**Staffing Plans, Hiring, and Management**

Include the following information for the proposed charter school:

The Board and CSUSA will be an equal opportunity employer and will recruit quality staff throughout the year for job openings using a progressive and innovative recruiting plan. Recruitment will occur locally, state-wide, and nationally through various resources that include:

- \* NRCA's website.
- \* CSUSA's website.
- \* Education job fairs.
- \* College recruiting by identifying colleges and universities, both locally and nationally in order to attract and hire newly graduated teachers.
- \* Select educational, professional, and job recruitment websites to advertise and communicate teaching openings.
- \* Minority referring organizations to help ensure that the workforce is reflective of the diverse community served.

CSUSA will manage job advertising, conduct applicant screening, and refer qualified applicants to the school administration and Board to ensure NRCA's staffing needs are met. A consistent process of screening, interviewing, and selecting employees is essential to our ability to recruit qualified staff. A consistent process will ensure that candidates are provided an equal opportunity to demonstrate and/or articulate their skills and abilities. Retention of highly-qualified and effective teachers will be part of the principals annual evaluation system. The principal will be encouraged to set goals and the annual evaluation will be based upon achieving those goals.

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

The Board has contracted with CSUSA for the provision of certain management services, including personnel services. Teachers will be jointly employed by the Board and CSUSA. Administrators and non-instructional staff will be solely employed by CSUSA. This arrangement is necessary for the administration of employee benefits, does not impact the Boards ultimate authority to hire and fire teachers, and complies with N.C.G.S., 115C-218.90. This arrangement has been reviewed and approved by legal counsel for DPI and the State Board of Education.

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

The Board and CSUSA will follow the protocol established for screening school employees, vendors, and Board members. The Board currently has a policy regarding employee criminal background checks that mirrors that of the LEA, as required by N.C. Gen. Stat. 115C-218.90, and will ensure that the same policy is in effect at NRCA. Every 5 years, school staff will be required to be fingerprinted and pass a criminal background check. The School Operations Administrator will be responsible for complying with and arranging criminal background checks.

A comprehensive criminal history background check will be conducted on each applicant. The Board and CSUSA will also ask legal questions on its employment application in relation to felony convictions, probation, pleadings, and pending disciplinary actions. If a candidate misrepresents information, the Board and CSUSA reserve the right to end the hiring process or employment relationship.

The selection process is informed by factors identified in applied psychology, such as interview structure and phrasing of questions, and draws on effective teacher research. Interview protocol focuses on job-related questions and is within the legal bounds of interviewing guidelines. Every hired non-instructional employee signs an offer of employment with CSUSA. Every teacher signs an offer letter from CSUSA and a separate letter from the Board due to the joint employment structure. Staff is hired "at will" on a year-to-year basis. Extensions of employment offers are recommended on an annual basis. All instructional personnel are considered 10-month employees paid over a 12-month period.

The first 90 days of employment are an introductory period. During this period, the employee may resign without reason and/or notice and the Board and CSUSA may terminate employment without cause and without notice. After this period, all employee resignations will be accepted as long as they are

submitted in writing with proper notice.

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

NRCA's salaries are competitive with the surrounding area schools but structured differently, with a greater emphasis on performance-based pay. For base salaries, pay bands have been established to a minimum, midpoint, and maximum scale by which job families can grow with merit increases. The Board will work with CSUSA to establish budget criteria, incentives, and other motivating factors that attract, reward, and retain the best employees. A salary worksheet will be used to calculate starting salaries in a fair and consistent manner. Below is an example of how starting salaries are determined:

- \* \$45,000 average salary for teachers (190 days)
- \* Up to \$2,000 positive adjustments to base for experience
- \* \$1,000 positive adjustments to base for education credentials (Masters or PhD)
- \* \$2,000 positive adjustments to base for critical shortage areas if applicable
- \* \$-3,000 negative adjustments to base if all requirements met and waiting for certification documentation.

Employees are offered mandated benefits as follows: Workers Compensation; Unemployment Insurance; and Social Security Insurance. Employees are also provided benefits with various levels of coverage and premiums. Full time employees are able to participate in the benefits plan the first of the month following their first 60 days of employment. If an employee has a qualifying life event during the year, they can enroll, drop coverage, and add dependents (i.e. birth of child, marriage, divorce, etc.). Qualifying events are mandated by the IRS. If benefits are not selected during the employees eligibility period, or within 30 days of a qualifying event, enrollment changes may only be made during the annual open enrollment period, which become effective January 1st. Benefits available include medical, dental, vision, life insurance, supplemental life insurance, dependent life insurance, short and long term disability, 401k (if eligible), Paid Personal Time Off, and Employee Assistance Program.

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

If an employee feels he or she has been treated unfairly as a result of actions from NRCA's administration, the employee can present a formal grievance to CSUSA's Director of Human Resources.

Instructions for Staff Submitting a Grievance

1. Discussion of the problem with the immediate supervisor is encouraged. Requests for an initial meeting to discuss a grievance must be made within 30 calendar days of the event giving rise to the grievance. The supervisor will schedule a meeting within 5 days of any such request by an employee and provide a written response within 5 days of the meeting. If the employee does not believe a discussion with the supervisor is appropriate, the employee should proceed directly to Step 2.
2. If the matter is not resolved, the employee should request to meet with the Regional Director, who will provide the employee with a written response within 5 days of the meeting.
3. If the matter is not resolved, the employee may submit a formal grievance in writing to CSUSA's Director of Human Resources within 10 days of

receiving the Regional Directors written response. The employee is encouraged to request a meeting with the Director of Human Resources, who will conduct an investigation and consider the facts and may review the matter with the aggrieved employees supervisor.

#### Terminations

The first 90 days of employment are an introductory period, and the employee may resign without reason and/or notice and the Board and CSUSA may terminate employment without cause and without notice. After this period, progressive discipline policies are followed for minor performance situations and investigations will be conducted by CSUSA and NRCA for any violations of a serious nature. The employee will be put on paid leave pending determination of the investigation. In the case of both progressive discipline and severe violations, the Board will vote on the determination at either an emergency Board meeting or the next scheduled meeting.

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

In the proposed staffing model, there are no positions with dual responsibilities. The Board and CSUSA strategically put together a 5-year staffing plan to cover all needs of the school so no position will have dual responsibilities. There will be employees that may have additional duties if they choose, such as mentoring, professional development, etc. These employees will be paid a stipend (which is included in the budget calculations) in addition to the salary for any additional duties as needed.

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

Staffing is flexible and subject to change based on the needs of the students as identified by the principal and the Board. Staffing needs are constantly monitored to enable NRCA to meet student needs.

Initially we plan to hire one EC teacher in Year 1 and add a second EC teacher by Year 3, one of whom will serve as Lead EC teacher to oversee EC compliance. An EC aide will also be hired for all years. This will be adjusted based on student needs as indicated in their IEPs and guidelines for class size (NC 1508-3) and caseload (NC 1508-4). We will also seek teachers certified in ELL, EC, or teachers with demonstrated experience in differentiated instruction, including extending knowledge for higher performing students.

We will contract with licensed related service providers including but not limited to a speech/language pathologist, occupational therapist, physical therapist, school psychologist, and other professionals as needed to address the students' needs per their IEPs.

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

#### AOC

The Board and CSUSA will ensure during the hiring process that 100% of instructional staff hired at the school have, or possess the qualifications to pursue, a North Carolina Professional Educator Licenses of either Standard Professional 1 (SP1) or Standard Professional 2 (SP2).

The Board and CSUSA will assist our teachers in meeting the licensure



requirements established by DPI and the Board of Education. We will develop, maintain, and promote a development program for all teachers and instructional staff to progress from a SP1 to a SP2 License. Assistance will be provided to instructional staff as well as the required information and documents needed to make this progression. The employee will be responsible for all fees for license progression and renewals. CSUSA Employee Services and the School Operations Administrator will maintain each employees file with updated licenses and alert all employees of the need to renew their current license with this program.

North Carolina's requirements for teachers from outside the state must be completed for clear renewable certification. These requirements are incorporated into North Carolina's approved teacher preparation programs and must be completed within five years.

All teachers will be jointly employed by the Board and CSUSA. The termination of employment of a teacher is subject to review and approval by the Board, which retains the ultimate decision to terminate. It is the responsibility of the Board and CSUSA to ensure teachers meet the requirements prior to employment and to ensure any conditional requirements are met by the educator within the required timeline.

The Board and CSUSA may employ or contract with skilled, selected, non-certified personnel to provide non-instructional services or to assist faculty members as teacher aides. Teachers will demonstrate content mastery in the subject area they are teaching through a state exam, as well as demonstrate successful completion of graduate work, an undergraduate academic major or advanced certification/credentialing. The EC Lead and consultants hired for occupational therapy, physical therapy, speech language, and other services will meet licensure or certification requirements for the services that they provide.

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

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

AOC

The Teacher Support Team is responsible for maintaining teacher licensure requirements and professional development. The team consists of the principal, assistant principal, and designated mentors. Each will assist teachers to grow as educators.

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

To ensure teachers provide an academically rigorous education, NRCA will mentor, retain, and evaluate staff in accordance with N.C.G.S., section 115C-333.1. All teachers who have not been employed for at least three years shall be observed at least three times annually by the principal or the principal's designee, and at least once annually by a teacher. Two of the principal or principal designee observations shall take place within the first semester for teachers with fewer than two years of employment, with one of the two observations prior to the first grading period, if possible.

All teachers with fewer than three years of service must be evaluated at least once annually by a principal. All teachers with career status shall be evaluated annually unless rules to be evaluated more or less frequently are adopted by the Board.

All teachers will be evaluated in accordance with NC Educator Evaluation System (NCEES). The NCEES also includes a Professional Development Plan (PDP) for beginning teachers, which is described further below. Before participating, every teacher must complete training on the evaluation process.

The Beginning Teacher Support Program (BTSP)

NRCA's BTSP will comply with SBE policy TCED-016 and utilize the North Carolina Department of Public Instruction BTSP self-assessment to monitor program compliance and efficacy. This program provides a number of required activities and additional tools to assess the performance of teachers and to facilitate the refinement of essential practices and skills. Additional support tools include a beginning teacher website, notification of professional development opportunities, online training modules, and additional instructional materials that support teacher retention.

Beginning teachers are assigned a mentor to assist with their growth in the first three years of the BTSP. Mentors will:

- \* Conduct observations of beginning teachers.
- \* Meet and/or communicate with beginning teachers on a bi-monthly schedule, at a minimum.
- \* Provide feedback to beginning teachers from observations and formative assessments.
- \* Assist beginning teachers with developing lesson plans; classroom management; behavior management; analyzing and collecting data; organization; positive communication with peers and parents; the curriculum; and instruction.
- \* Assist with collecting and analyzing data to improve instructional strategies.
- \* Share information regarding professional development.
- \* Assist in the preparation and implementation of the PDP.

NRCA's principal will help facilitate the development of beginning teachers by:

- \* Providing orientation.
- \* Conducting informal/formal observations.
- \* Meeting and conferencing with beginning teachers to offer feedback from observations and formative assessments.
- \* Providing an environment conducive for the support of beginning teachers.
- \* Ensuring completion and providing assistance in the development of PDPs.
- \* Monitoring beginning teachers throughout the year and notifying the Director of Human Resources of any concerns with beginning teacher performance.
- \* Evaluating the BTSP to identify areas requiring improvement.

NRCA will document compliance of the BTSP through informal/formal observations, PDPs, summative evaluations, and other documentation regarding the evaluation of beginning teachers pursuant to the NCEES on the State-maintained Home Base website.

### Teacher Learning Communities (TLCs)

NRCA will implement TLCs to provide support to teachers in their first year. TLCs support teachers throughout the year by focusing on research-based instructional strategies, classroom management, lesson planning, time management, state and district requirements, and professional communication. A master teacher will lead NRCA's TLC program. This highly organized program receives support from the EMO network through quarterly training sessions, monthly web-based video training sessions, and training materials.

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

Beginning teachers are required to develop an annual PDP based on the North Carolina Professional Teaching Standards and must include individualized goals, strategies, and an assessment of the teacher's progress in improving professional skills. The plan shall be created within 10 days of the beginning of the school year. The plan will be kept on the Home Base website.

### Individual Growth Plan

Teachers who are rated at least "Proficient" on all the standards on the Teacher Summary Rating Form (TSRF) shall develop a PDP designed to improve performance on specifically identified Standards and Elements.

### Monitored Growth Plan

A teacher shall be placed on a Monitored Growth Plan whenever he/ she:

- A. Is rated "Developing" on one or more standards on the TSRF; and
- B. Is not recommended for dismissal, demotion, or nonrenewal.

A Monitored Growth Plan shall identify the Standards and Elements to be improved, the goals to be accomplished, the activities the teacher should undertake to achieve proficiency, and a timeline which allows the teacher one school year to achieve proficiency. A Monitored Growth Plan that meets those criteria shall be deemed to satisfy the requirements of N.C.G.S., 115C-333.1(b).

### Directed Growth Plan

A teacher shall be placed on a Directed Growth Plan whenever he/she:

- A. Is rated:
  - 1) Not Demonstrated" on any Standard on the TSRF; or
  - 2) Developing" on any Standard on the TSRF for two sequential years; and
- B. Is not recommended for dismissal, demotion or nonrenewal

The Directed Growth Plan shall identify the Standards and Elements to be improved, the goals to be accomplished, the activities the teacher shall complete to achieve proficiency, a timeline for achieving proficiency within one school year.

PD will be conducted by various parties, including but not limited to school leaders, EMO representatives, and curricular and/or software vendors. The scope of PD will also vary according to the needs of the school and staff.

4. *Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will*

*be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.*

#### Principal's Institute

CSUSA provides principals with their own PD institutes each summer to best prepare for the upcoming year. Principals within the network are provided with a multi-day Principal's Institute (PI) where leaders of CSUSA-managed schools develop professional networks, share best practices, and calibrate understanding of state regulations. The institutes serve to celebrate successes, drive planning for the upcoming school year, and motivate school leader accountability. PI sessions prepare school leaders with key initiatives to increase student achievement and allow for regional planning. Leaders who are new to the CSUSA network also benefit from New Principals Institute (NPI), which provides an introductory training on school and network systems, expectations, and programs. Post NPI and PI, monthly meetings provide additional support for principals and assistant principals throughout the school year and is overseen by the state director, curriculum specialists, and special program coordinators.

#### New Teacher Induction (NTI) / Returning Teacher Orientation (RTO)

NRCA will be responsible for conducting a formal orientation in the summer, which is provided and supported by CSUSA's Education Team. In year one, NTI/RTO will be conducted over fifteen days (ten days for NTI and five days for school-specific orientation) and include all teachers, including teachers who are new to the CSUSA network and experienced teachers. Teachers will first receive comprehensive training that ensures understanding of the Education Model and Core Fundamentals, prior to receiving training that includes reviewing the works *The New Art and Science of Teaching* and *What Works in Schools*, classroom management, curriculum mapping, lesson planning, differentiated instruction, formative and summative assessments, grading philosophy, tracking progress, the code of ethics, exceptional children education, and more. NTI/RTO is modified annually based upon the needs of NRCA and to reflect new strategies and innovations in effective teacher preparation. The governing board acts as the monitor for this program, which is provided by CSUSA.

The NTI portion of the program consists of the following:

- \* A tour of the school.
- \* NRCA's faculty handbook.
- \* Beginning Teachers Handbook which includes pertinent school policies and procedures as well as CSUSA's vision and mission statement.
- \* Information regarding the available services and training opportunities for beginning teachers.
- \* BTSP and a detailed review of licensure procedures, requirements and information regarding the conversion process from the initial SP 1 license to the continuing SP 2 license.
- \* North Carolina Teacher Evaluation Process, including expectations for the required performances of beginning teachers during the 3-year Beginning Teacher Program.
- \* NC Standard Course of Study and the GVC.
- \* Safe and appropriate use of seclusion and restraint of students.
- \* State's Ready Accountability Model.
- \* State Board of Education's mission and goals.

The RTO portion of the program, which begins after year one, includes training on school initiatives, safety and procedural protocols, curriculum, and other pertinent information for the school year.

#### Curriculum Resource Teacher (CRT) Bootcamp

CRTs attend boot camp prior to the start of each school year to provide training on how to best support the school. CRTs from the CSUSA network will meet with CSUSA's regional Curriculum Specialist (CS) team in the summer to prepare for teacher coaching and supporting implementation of the Educational Model and Core Fundamentals. This will set the stage for increasing student achievement throughout the school year. CRT Bootcamp is followed by monthly CRT Cadre sessions, also facilitated by the regional CS team, that provide CRTs a regular opportunity to discuss innovative classroom methods, analyze data, and share and implement the most effective strategies.

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

During the school year, needs and opportunities for staff training are identified according to analysis of student performance data, administrator and CRT observations, CSUSA Carolinas instructional site visit data, and teacher requests. NRCA will design or select PD programs based on the schools needs with input from administrators and staff. PD will be held in various formats including consultation, modeling, coaching, learning communities, observation and feedback, lesson studies, mentoring, content training sessions, reflective collaboration, and technical assistance. Sessions may be led by mentor or lead teachers, administration, the CRT, state CS team, or outside experts.

The sample school calendar provided in Appendix C identifies four full professional development days, which could be utilized to train staff in the use of instructional software reports and teacher resources, implementation support for the schoolwide behavior plan, integrating technology, or any other focus aligned with the schools needs.

Throughout year one, CRTs, with guidance from the state CS team, will provide weekly coaching support to teachers based on individual or grade-level need, and deliver professional development activities at the school.

The daily school schedule is designed to accommodate common grade planning periods. One schoolwide meeting per month is devoted to topics associated with Professional Standards. This time is also used for targeted PD sessions based on specific needs identified through professional learning communities and monthly data chats. Teachers meet with administrators, CRTs, CSs, or peers to receive PD based on NRCA's Core Fundamentals strategic implementation plan, school initiatives, survey results, teacher demand, or other areas needed for school improvement. Meetings are conducted after school, on PD days, or during weekly planning.

#### Professional Development Plan

NRCA's PD plan is intended to be completed over the course of the school year and consists of targeted PD segments rolled out to support the schools implementation of the Education Model. Trainings are facilitated in the

first year by the schools CS team, and in subsequent years by the CS and/or the school-based CRTs and administrative team. A sample PD Plan could consist of the following topics, which establish the Core Fundamentals that enable full and effective implementation of the Education Model:

1. Expectations and Procedures (aligned to schoolwide behavior plan)
2. Grading Philosophy and Processes (gradebook setup)
3. GVC (unpacking standards)
4. Lesson Planning
5. Instructional Software
6. Introduce Balanced Assessment System
7. Instructional Focus Calendar and Success Time
8. Social Emotional Learning and Character Education
9. Balanced Assessment System (Benchmark Assessment Training)
10. Data-Driven Instruction - Small Group Instruction
11. Response to Intervention (MTSS)
12. Tutoring Expectations
13. Balanced Assessment System (Formative Assessment Training)
14. Data Driven Instruction Differentiation
15. Balanced Assessment System (Summative Assessment Training Test Specifications)
16. Personalized Learning Plans
17. Effective Data Chats
18. Teacher Evaluation System (TFET/DPP Training)

### **Enrollment and Marketing:**

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

### **Marketing Plan**

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

#### Primary Target Demographics

Families with children ages 5 - 14 residing in the North Raleigh area, specifically Wake Forest, Youngsville, Franklinton and the surrounding communities.

#### Marketing Strategy

The communication strategy includes an integrated marketing approach; which may include digital advertising, social media, print, radio, television, community outreach and events. Each medium is evaluated based on its reach (how many potential targets will see or use this medium) and frequency (how often potential targets will see/read/hear our message), as well as its likelihood to drive traffic.

Digital advertising will be utilized to reach out to our target demographic. This will include but not be limited to social media sites, online education resources, online parenting resources and community sites. Online ads will

direct the potential parent/guardians to the schools website at [www.northraleighcharter.org](http://www.northraleighcharter.org) Targeted email blasts and campaigns that piggy-back on community websites/events are utilized whenever possible. Online advertising primarily includes Facebook, GreatSchools.com, and Google focusing on geographic data and targeted searches.

A television campaign may be run on cable and/or broadcast television. Cable television provides a more targeted reach with a very high frequency. Broadcast provides a very large reach, but low frequency. A radio campaign will also be considered to build awareness. Stations will be chosen based on how they align with our targeted demographic. Print back-to-school sections and age-appropriate advertising sections will be considered.

Paid advertising on social media outlets is utilized to reach our demographic and geographic targets. Facebook, Twitter, YouTube, Instagram and Pinterest will be considered.

Community outreach and events will be offered. NRCA will align with community partners such as the Chamber of Commerce as well as area rotary clubs and other civic organizations. NRCA will work with area civic/community centers, such as the YMCA, Regional Library, and Park and Recreation Centers to post information and hold community outreach events. We will also distribute flyers to local pre-schools, daycare centers, and churches.

#### Implementation

Sept. 2018 - Jan. 2019

- \* Update web site
- \* Participate in community events
- \* Join community organizations
- \* Build relationships with local media

Jan. 2019 - June 2019

- \* Research and tentatively secure paid advertising media
- \* Plan community information sessions
- \* Prepare all advertisements; brochures/flyers; direct mail pieces; press releases
- \* Update website with NRCA information, building process photos, application process, enrollment policy, lottery process, community information session dates, venues, and times
- \* Host community information sessions
- \* Send out first of a series of direct mail pieces introducing the school

Feb. 2019 - March 2019

- \* Community information sessions
- \* Open local enrollment office - distribute promotional materials
- \* Set advertising campaign to run through the end of open enrollment
- \* Distribute direct mail pieces encouraging applications once per month for three months; evaluate application generation at the end of campaign and decide if additional mailings are necessary
- \* Evaluate results on a monthly basis to determine if advertisements are working

March 2019 - Aug. 2019

- \* Schedule lottery
- \* Continue advertising and distribute additional two direct mail pieces mailed monthly
- \* Attend events at community centers, libraries and YMCA
- \* Develop sponsorship opportunities and attend school expos

Sept. 2019 - Dec. 2019

- \* School Open House events

Jan. 2020 - March 2020

- \* Continue advertising based on need/number of seats available
- \* Parent information sessions
- \* School tours

## **Parent and Community Involvement**

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

AOC

We plan to communicate and engage parents and community members through enrollment information sessions, speaking opportunities at local churches and civic organizations, distribution of informational materials to preschools, churches, and local business and service organizations in the community, all of which provide a forum to share our vision and mission for NRCA. A number of public information sessions will be hosted to introduce the Board and its vision for NRCA, inform the community of the mission and educational focus, and communicate the enrollment process to parents. These sessions allow for a Q&A and open forum to provide parents an opportunity to ask questions and further engage with the Board. Parents are able to learn more about NRCA, its educational model, and how to apply. Public information meetings are advertised through direct mail, email, newspaper ads, and flyers. We will continue to look for community events where we can distribute marketing collateral to inform the community about the proposed charter school and how to apply. Once parents submit an application, we are then able to continually update them via email through the student information system. NRCA's website will serve to communicate general information, provide updates regarding the school's opening, offer an enrollment tool, provide updates on the progress of the school, and provide updated FAQs. The website will also include an informational video for those who are unable to attend information sessions that covers much of the same content.

We will continue to engage parents in the life of NRCA by following the CSUSA Education Model which includes a comprehensive parental involvement program and family-school-community partnership model. Parental involvement includes attending school functions; attending conferences; helping children improve their school work through encouragement, providing study time and place, model behavior, and tutoring; serving as advocates for their children



and the school; volunteering in the school and community; and assuming an active decision-making role in their child's education (Maynard 1997).

NRCA will utilize the framework of Joyce Epstein, whose model includes six types of cooperation between families, schools, and other community organizations: 1. Parenting; 2. Communicating; 3. Volunteering; 4. Learning at home; 5. Collaborating with the community; and, 6. Decision-making (Epstein, 1995; Epstein, 1997). The framework of six types of involvement helps educators develop more comprehensive programs of school-family-community partnerships. Although NRCA will use the framework as a guide; the Board, parents, and school staff will choose practices that help achieve important goals and meet the needs of students and families.

Parent participation is integral to the success of NRCA and will continue to be solicited for the development of school goals and objectives. All parents agree to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents shall be strongly encouraged to volunteer a total of 30 hours per school year. Parents can track volunteer hours via the student information system. To ensure that all parents and stakeholders understand the unique programming of the CSUSA model, parents and students are given thorough explanations of the curriculum, expectations, and requirements of NRCA prior to enrollment. This information is delivered through a variety of ways: open houses, published information, brochures, online applications, and website question/answer modules. After enrollment and the start of school, parents continue to have flexibility to monitor their child's progress online and/or through parent conferences. Because NRCA follows a continuous improvement model, parents have real-time access to their child's progress.

## **Admissions Policy**

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

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

NRCA will follow the admission requirements stated in N.C.G.S., 115C-218.45. For the first year, open enrollment will (tentatively) begin February 17th and close on March 31st. In subsequent years, open enrollment will open on December 1st and close on February 1st.

The process and policies for open enrollment and the lottery are outlined below.

- \* Applications are primarily collected via the student enrollment system.
- \* Applications submitted within the open enrollment period are processed in the lottery, if a lottery is needed.

\* At the close of open enrollment, NRCA will determine if a lottery is needed at any grade level. A lottery will be completed if there are more applications (received within open enrollment) than seats available in any grade level.

\* If needed, a lottery will be held two to four weeks after the open enrollment period closes.

\* NRCA will verify preferences and number of seats available prior to the lottery.

\* NRCA will give enrollment preference to the applicant children of Board members and full-time school employees. The number of students receiving this preference may not exceed 15% of the school's enrollment.

\* NRCA will extend sibling preferences to eligible applicants.

\* NRCA will give enrollment preference for applicants who qualify for Economically Disadvantaged status.

\* Parents will receive lottery ID letters approximately one week prior to the public lottery.

Applicants selected to receive an open seat receive an offer. An applicant whose name is drawn after all open seats are filled is placed on the waitlist. As seats become available, NRCA offers the open seat to the next child on the waitlist. NRCA will exhaust the waitlist prior to moving to the list of applicants who applied after the close of open enrollment. Applications received after the close of open enrollment are ordered on the waitlist according to the date/time received.

If a family wishes to withdraw from NRCA, they must complete a withdrawal form at the school. Once NRCA receives a records request from the child's new school, the school will send the records as requested. Upon withdrawal, the school will then offer the open seat to the next child on the waitlist.

Parents may withdraw or transfer students at any time and records will be forwarded.

If a family leaves NRCA and wishes to re-enroll at the school, the family must submit a new application, be placed on the waiting list, and then wait until a seat becomes available for their child. A student who was enrolled in the charter school within the two previous school years but left the school (i) to participate in an academic study abroad program or a competitive admission residential program or (ii) because of the vocational opportunities of the student's parent may re-enroll without submitting a new application or being placed on the waitlist.

There are no mandatory pre-admission activities. The following events are optional:

\* Open House: Allows parents and their children to become acquainted with their child's classroom and teacher(s).

\* Orientation: Typically takes place right before the start of school. This event is primarily a medium through which NRCA communicates operational practices and procedures to families.

\* Family Information Session: This event is for interested families who want to learn more about NRCA.

\* School Tour: The purpose of this event is to show the school building to families, and field any questions families may have.

### **Weighted Lottery**

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

Yes:

No:

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

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

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*

NRCA is committed to providing equitable access to a high quality, technology-rich, personalized learning environment for all students within the schools community. NRCA is also committed to reflecting the makeup of that community within the school as genuinely as possible, which includes enrolling a proportionate amount of Economically Disadvantaged (ED) students. ED students are those students who are classified as eligible to receive free or reduced lunch. According to DPI statistics, Wake County Schools averaged approximately 33% of students classified as eligible for receiving Free and Reduced Lunch in 2017-18 according to the National School Lunch Program (NSLP) guidelines. Schools within the 15 minute drive time of the Wake Forest area had a comparable percentage to the LEA average (31%). Students classified as ED in Wake County Public Schools significantly underperformed the general student population. 39.1% of ED students scored a Level 3 (Grade Level Proficient) compared to 65.8% of the general population. 29.8% of ED students scored a Level 4 or 5 (College and Career Readiness) compared to 57.8% of the general population.

Goal 6 of the State Board of Education Strategic Plan is "to ensure equity of educational opportunity for all students." NRCA will provide an opportunity for academic growth for lower income families by offering a personalized approach of actively integrating the school population and reducing the barriers to enrollment for low-income families. NRCA will encourage enrollment of ED students by offering support for families through

participation in the NSLP, transportation assistance, personalized education, and connections to community resources.

*2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*

The goal of the weighted lottery for NRCA is to ensure equitable access for students classified as Economically Disadvantaged (ED) using the NSLP guidelines for Free and Reduced Lunch. NRCA will institute a priority lottery for the remaining available lottery seats (after staff, board, and sibling preferences) in order to achieve 15% of students meeting the ED criteria are reflected in the school population.

With each annual lottery, the principal will identify the number of FRL seats to make available per grade level in order to promote a balance of admitted students across each grade. The number of total openings at each grade level will be reduced based on the number of openings reserved for ED priority. Each applicant will have the opportunity to select priority ED status on the lottery application. This designation will be optional and not required. However, applicants that do not select ED priority on the lottery application will not be able to indicate priority at a later date. Applicants that select ED priority status will be required to consent to household income verification by designated school staff to verify FRL status. Only designated staff will have access to this information. Once the status is verified, the documentation will not be retained for used for any other purposes.

*3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

The Century Foundation, the National Assessment of Educational Progress, the American Educational Research Association, and The National Coalition on School Diversity have researched the positive effects of a diverse learning environment for all students, particularly low-income students and students of color. Research over the last five decades from the Coleman Report in 1966 to the 2011 National Assessment of Educational Progress indicates that a diverse learning environment enhances creativity, cognitive ability, critical thinking, and social skills for all students.

In 2012, the Central Park School for Children located in Durham, became the first charter school in North Carolina to purposefully strive to balance economic diversity within the school population through the use of a weighted lottery. In the six years since the policy was piloted, other charter schools have followed suit including the Community School of Davidson in 2016, and The Exploris School in 2018.

Both state and national research indicates that charter school populations often vary dramatically from the traditional school system in which they are located, leading opponents to criticize charter schools for pulling the affluent families away from traditional schools. Charter schools have very little beyond marketing efforts to control the economic and racial make-up of the student population. The use of a weighted lottery is one tool that has allowed schools like the Central Park School for Children and the Community School of Davidson the ability to balance out the economic

demographics while providing an engaging, diverse learning environment for all students.

The Century Foundation

<https://tcf.org/content/facts/the-benefits-of-socioeconomically-and-racially-integrated-schools-and-classrooms/?agreed=1>

The National Coalition on School Diversity

<http://school-diversity.org/pdf/DiversityResearchBriefNo10.pdf>

American Educational Research Association

[http://www.aera.net/Portals/38/docs/Annual\\_Meeting/2016%20Annual%20Meeting/2016%20Knowledge%20Forum/Wells.pdf](http://www.aera.net/Portals/38/docs/Annual_Meeting/2016%20Annual%20Meeting/2016%20Knowledge%20Forum/Wells.pdf)

**PROJECTED ENROLLMENT**

**Year 1 through Year 5**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Wake County Schools
- LEA #2 Franklin County Schools
- LEA #3 Granville County Schools

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

	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA 920	LEA 350	LEA 390	LEA 920	LEA 350	LEA 390	LEA 920	LEA 350	LEA 390	LEA 920	LEA 350	LEA 390	LEA 920	LEA 350	LEA 390
Kindergarten	64	12	4	64	12	4	64	12	4	64	12	4	64	12	4
Grade 01	74	14	4	74	14	4	74	14	4	74	14	4	74	14	4
Grade 02	74	14	4	74	14	4	74	14	4	74	14	4	74	14	4
Grade 03	74	14	4	74	14	4	74	14	4	74	14	4	74	14	4
Grade 04	74	14	4	74	14	4	74	14	4	74	14	4	74	14	4
Grade 05	74	14	4	74	14	4	74	14	4	74	14	4	74	14	4
Grade 06	60	11	4	60	11	4	60	11	4	60	11	4	60	11	4
Grade 07	0	0	0	60	11	4	60	11	4	60	11	4	60	11	4
Grade 08	0	0	0	0	0	0	60	11	4	60	11	4	60	11	4
	494	93	28	554	104	32	614	115	36	614	115	36	614	115	36
	615			690			765			765			765		

Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
What assurances does the board have that they can effectively oversee the opening of two new schools in one year?	Jennifer Gnann	Certify Gove
<p>Please clarify and detail further the power structure between CSUSA, the board, and the Triangle Charter Education.</p> <p>What experience do you feel your board needs more of? Are there plans to increase legal experience in the future?</p> <p>"CSUSA will remove the principal if the Board is reasonably dissatisfied with his/her performance." How is this determined. What if CSUSA, the board, and/or Triangle Education are at odds?</p> <p>How are parents recruited for the parent teacher committee and/or focus groups? How will you ensure participation from all walks of life (i.e. ED parents)?</p> <p>What does the board recruitment process look like and/or entail?</p> <p>Please explain the rationale for the parents to go to CSUSA before the board on grievances.</p>	Jessica Whalen	Governance a
Please elaborate on the number of schools the board governs. Will there be separate board meetings for each school?	Ashley Baquero	Governance a
Since the Board is the Triangle Charter Education Association & there is work with an EMO, is there concern about one Board having to make decisions and have representation for two schools?	Shannon Stein	Governance a
<p>Based on the following, "The three turnaround schools in Indiana are CSUSA's lowest performing. Managed since 2012-13, more than 90% of the students qualify for free and reduced lunch, and the student body is 53% minority. Collectively, the Indiana schools have made outstanding progress, far exceeding one years annual growth on NWEA MAP assessments. In 2017, approximately 110% of growth targets were met in reading and 119% in math, the equivalent of over one years worth of growth. School grades at the Indiana schools were markedly improved from prior years. Two schools earned passing grades for the first time in the last decade. Preliminary results for the 2017-18 school year are indicative of continued improvements." How will NCRA ensure ED students are supported and performing as suspected as being ED may be a factor to CSUSA lowest performing schools?</p> <p>How does the board oversee financial decisions or is this strictly CSUSA's responsibility? If it is CSUSA's responsibility, explain rationale.</p> <p>Please detail what it looks like to be employed by two different entities. How does this work in regards to benefits?</p>	Jessica Whalen	Proposed Man
Please explain the fund balance decreases from FY 16 to FY 17.	Jennifer Gnann	Proposed Man
Why has Cardinal's enrollment been decreasing over the past few years?	Jennifer Gnann	Charter Scho
For the 2017-2018 school year, why was the % of students that recommitted so much lower than the year before?	Shannon Stein	Charter Scho
<p>Please detail ED, ELL, and SWD percentages.</p> <p>Why has enrollment decreased at Cardinal Charter? Why has the number of new applications received also decreased? Please explain why commitments have decreased as well.</p> <p>The following is not evident in regards to ED population: "Our Board is currently operating a school [Cardinal Charter] which serves a similar student population." What will NCRA do differently to ensure ED students are supported adequately when ED population may be double that of Cardinal Charter?</p>	Jessica Whalen	Charter Scho
Will one EC teacher suffice for 600+ students?	Ashley Baquero	Staffing Pla

<p>finance officer is not in staffing plan but in budget?</p> <p>school operations administrator is not in the budget.</p> <p>Please detail what the before/aftercare-director and before-aftercare entails. Will NCRA have an afterschool care for students? Please explain rationale.</p> <p>How will you ensure EC teachers are effective and adequately support all EC students given the amount of EC students?</p> <p>CSUSA vet teachers and the Board hires them but then what? Please clarify the relationship between teachers, board, and CSUSA.</p> <p>How will teachers not receiving benefits for the first two months affect recruitment?</p> <p>How are EL students supported and monitored if there is no EL teacher or coordinator? Who will be doing this?</p> <p>Who is responsible for overseeing the licensure requirements or renewal for teachers? What does this look like?</p>	Jessica Whalen	Staffing Pla
<p>Since the administrative staff are CSUSA employees, what "voice" will the Board have if there are concerns about performance?</p> <p>What flexibility does the Board have for staffing depending on student needs (i.e. ESL, EC, etc.)?</p>	Shannon Stein	Staffing Pla
<p>The number of EC/AIG teachers seems low for this population.</p>	Jennifer Gnann	Staffing Pla
<p>Who are the designated mentors? How are they determined?</p> <p>When does this mentoring occur?</p> <p>Who conducts the teacher evaluation training and when does this occur?</p> <p>How will a "master teacher" be determined?</p> <p>A big chunk of time for the principal seems to be spent on developing teachers. How will this affect other areas or responsibilities of the principal?</p>	Jessica Whalen	Staff Evalua
<p>How will you ensure effective communication with families whose first language is not English?</p>	Ashley Baquero	Parent and C
<p>Please detail other options to adequately reach all parents if they have no internet access or email.</p> <p>"All parents agree to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents shall be strongly encouraged to volunteer a total of 30 hours per school year. Parents can track volunteer hours via the student information system." What will parents be doing as they volunteer? If a parent does not do these hours, what happens? If parents are having trouble completing hours or getting to the school or destination to complete hours, what supports are available?</p>	Jessica Whalen	Parent and C
<p>What other options can be provided to submit applications if parents or students do not have internet to apply online.</p> <p>Please explain rationale: "If a family leaves NRCA and wishes to re-enroll at the school, the family must submit a new application, be placed on the waiting list, and then wait until a seat becomes available for their child. A student who was enrolled in the charter school within the two previous school years but left the school (i) to participate in an academic study abroad program or a competitive admission residential program or (ii) because of the vocational opportunities of the student's parent may re-enroll without submitting a new application or being placed on the waitlist."</p>	Jessica Whalen	Admissions P
<p>What happens if all the students in grade 05 matriculate to grade 06? (i.e. you would be over projections)</p>	Shannon Stein	Projected St
<p>Why do you expect a decrease in enrollment from 5th to 6th grade?</p>	Jennifer Gnann	Projected St



<p>What is the rationale for having grades K, 6-8 not have as many students as grades 1-5?</p> <p>This projection calls for max enrollment in the first year, how will you ensure this? How will staffing plans change if enrollment is not met?</p>	Jessica Whalen	Projected St
<p>Is this the first time a CSUSA partner school has proposed a weighted lottery?</p>	Steven Walker	Weighted Lot
<p>It is not evident and clear that NCRA is reducing barriers for enrollment for low-income families (i.e. application must be submitted online, parent volunteers, etc.)</p> <p>"Applicants that select ED priority status will be required to consent to household income verification by designated school staff to verify FRL status. Only designated staff will have access to this information." Who confirms or is in charge of this? What does this look like?</p>	Jessica Whalen	Weighted Lot

Reviewer	Score
Alex Quigley	
Alan Hawkes	
Ashley Baquero	Pass
Bruce Friend	
Cheryl Turner	
Danielle Allen	
Steven Walker	Pass
Heather Soja	Pass
Jennifer Gnann	Pass
Joe Maimone	
Lindalyn Kakadelis	
Kristen Parker	Pass
Lynn Kroeger	
Phyllis Gibbs	
Jessica Whalen	Fail
Robert McOuat	
Shannon Stein	Pass
Sherry Reeves	
Stephenie Clark	
Tammi Sutton	

## V. OPERATIONS

### Transportation Plan:

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

The Board recognizes that transportation cannot be a barrier to any child attending the school. Therefore, school administration and CSUSA will assist parents with the identification and coordination of transportation options to ensure that transportation to the school is available to all students. This will include facilitating car pools and informing parents as early as Open House of their transportation options. All parents will be provided with a link to an electronic survey through which they are able to express their interest in ride sharing and gain access to a pool of parents residing within the same region.

In the event ridesharing may not be achievable, the school may provide transportation through an agreement or contract with the local school district or a private provider. If necessary, the school will contract with a district-certified and licensed school bus company to provide transportation. The provider shall furnish proof that it meets or exceed all applicable district, state, and federal rules and regulations governing student transportation.

If transportation is offered, the school will restrict transportation of students to those who live within a reasonable distance, generally considered to be within a 2 - 4-mile walkout radius of the school, and those students subject to a hazardous walking condition. The school may provide transportation to students outside of the reasonable distance when transportation is necessary to provide adequate educational facilities and opportunities which otherwise would not be available. Transportation will be provided for students with disabilities enrolled in the school as required by the students IEP.

At the request of the parent, the School shall provide transportation pursuant to the McKinney-Vento Homeless Assistance Act (42 U.S.C. Section 11431, et. seq.) for each child of a homeless individual and each homeless youth.

One bus has been included in the budget for transportation at an average rate of \$300 per day for year one. A 2% increase has been budgeted each year thereafter. The school shall receive its portion of categorical funds relating specifically to transportation of students.

- \* Year 1: \$54,000
- \* Year 2: \$55,080
- \* Year 3: \$56,182
- \* Year 4: \$57,305
- \* Year 5: \$58,451

All transportation related information will be provided to parents via student information system communication as well as in the Live Binder of

Frequently Asked Questions, which will be published online for all applicants and enrollees.

**School Lunch Plan:**

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

AOC

The facility plan will include a multipurpose room which will mainly be used as a spacious cafeteria and also serve as a gym. The school will contract with a national food service vendor to provide breakfast and lunch. The food vendor will provide a quality, unitized meal program that includes all the components of a full-service operation. The component meal system should consist of individually packaged entrees, side dishes, fresh fruits, vegetables, bread, milk, condiments, plastic wear, and trays and liners. Prior to the beginning of the school year, the selected food vendor and the Board will send training personnel to the school to train food service staff on how to properly run the food service program, including: ordering, inventory, food preparation, serving procedures, and clean up.

The school will utilize a computerized point-of-sale system that will track meals and provide a reporting function for accountability and claiming. All students are assigned a unique account number and can add funds to their account in the cafeteria office and online. Regardless of account balance, no child is ever denied a meal. Serving lines are set up with the point of service station at the end. This set up ensures the cafeteria personnel can verify students are receiving all required components of a reimbursable meal.

In addition, the Board will complete all necessary NSLP applications in advance of the school year. At the end of each month, the cafeteria staff will be responsible for sending the monthly edit check to the NSLP Director for use in the submission of the reimbursement claim. If the schools application for participation in this program is not accepted, the school will continue to serve free and reduced meals to students who would have otherwise qualified under NSLP regulations. The school will amend its operating budget to reflect the reduction in revenues associated with reimbursement from the NSLP.

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

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

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;

- e. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' compensation: as specified by Chapter 97 of the General Statutes, Workers' Compensation Law.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$7,900.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$2,200.00
Property Insurance	\$10,367,690		\$21,185.00
Motor Vehicle Liability	\$1,000,000		\$15.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$500.00
Other	\$3,395,944		\$19,317.00
Total Cost			\$51,117.00

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

**Health and Safety Requirements:**

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

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

trianglecharter 10/01/2018

(Board Chair Signature) (Date)

**Facility:**

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

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

The Board has been working in conjunction with a third-party developer and CSUSA for the past several months to identify and acquire a site in the Wake Forest community. In addition, the developer has met with officials from the town of Wake Forest to garner their support and ensure that schools are an approved use for this site. As a result of these efforts, the Board has already identified a site for the school on Falcate Drive, just east of Capital Boulevard between Dr. Calvin Jones Highway and Durham Road. The seller has also agreed to hold the property throughout the application

process, and we will begin finalizing site acquisition upon application approval.

CSUSA will not provide the facility; however, the Board has partnered with third-party partners and developers who can finalize site acquisition and successfully execute the facility strategy under the guidance of the Board and CSUSA. CSUSA will undertake the necessary arrangements to ensure that the Board gets a facility.

It is anticipated that the facility will be owned, constructed, and financed by a private developer, who will then lease the facility to the Board which will make rent payments for the facility.

We will review all options and approve a facilities solution that is competitive, encompasses the needs of the school, and fits within the budget. The Board intends for NRCA to be a newly constructed facility that meets the needs of the student population. The facility will meet all applicable commercial and life safety codes. The facility layout will be based upon previous plans that have been successfully deployed for charter schools serving similar sized populations. The two-story facility is expected to be approximately 39,860 square feet in size. The facility layout will accommodate a logical separation of the elementary (K-5) and middle (6-8) school grades. In addition, the layout will include adequate resource rooms for enrichment programs, common areas for gathering for assemblies and other functions, a multi-purpose room that will serve as both a spacious cafeteria and a gym, and space for school administration. The school site plan will also include appropriate outdoor recreational areas, designated pick-up and drop-off zones, and parking for staff and guests.

CSUSA will work with us to design a superior learning environment to achieve thematic and specialty programs inclusive of school technology, academic communities, and arts and sciences. CSUSA works with and has access to a variety of architectural firms experienced in building schools that provide a safe learning environment and operate efficiently and effectively. The process is accomplished by a team of experts, whose disciplines include: education, licensed general contracting, and project management.

Detailed project plans will be implemented for each phase of the project. All construction and renovation projects undertaken prior to the opening of the school or during the term of the charter will be carried out by experienced and appropriately licensed and insured construction professionals who will perform all work in accordance with the construction specifications, drawings, and other documents, as directed by the design professional.

Schedule of the key milestones for the development of the school:

9/18 - 8/19

- \* Approval of charter application
- \* Construction drawings/plans approval
- \* Finalize architectural design
- \* Site selected and contract executed
- \* Site review
- \* Construction financing

- \* Site plan approval
- \* Land development permit

8/18 - 4/20

- \* Apply for general building permit
- \* Land development
- \* Facility construction
- \* Technology planning

4/20 - 7/20

- \* RFPs for vendors
- \* Community activities
- \* Execute facility lease
- \* Construction (ongoing)
- \* Direct marketing for student enrollment
- \* Complete construction

6/20 - 8/20

- \* Certificate of Occupancy
- \* Installation of FF&E
- \* Technology installation
- \* First day of school

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

The cost per square foot approximately \$19 (capital lease payment).

Costs are derived in consideration of acreage, location, and design. The Board will review all options and approve a package that is competitive and encompasses the needs of NRCA.

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

The Board has evaluated several potential locations and settled on a final site on Falcate Drive just east of Capital Boulevard that we are currently in the process of acquiring. Once acquisition of this site has been finalized, the other sites that we explored throughout the site selection process will be considered backup locations. In the unfortunate event that an adequate, permanent school facility is not secured, the Board and CSUSA will work diligently to secure an alternative short-term facility. The temporary facility would fully meet the needs of students and staff and would not impact any program offerings at the school.

X

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<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Do you have data on transportation needs thus far?  When is the decision made to get a bus?  Does the bus funds provided include gas and/or maintenance?  What evidence do you have that the following will more for a majority of students: "If transportation is offered, the school will restrict transportation of students to those who live within a reasonable distance, generally considered to be within a 2 - 4-mile walkout radius of the school, and those students subject to a hazardous walking condition. The school may provide transportation to students outside of the reasonable distance when transportation is necessary to provide adequate educational facilities and opportunities which otherwise would not be available. Transportation will be provided for students with disabilities enrolled in the school as required by the students IEP"?	Jessica Whalen	Transportati
Does the Board feel that the transportation plan is consistent with the demographics and desire to have a purposeful EDS population?	Shannon Stein	Transportati
Does the Board feel that the food plan is consistent with the demographics and desire to have a purposeful EDS population?	Shannon Stein	School Lunch
"The facility plan will include a multipurpose room which will mainly be used as a spacious cafeteria and also serve as a gym." How will this work? How will this affect students who may gym during another lunch wave?  Who is responsible for point-of-sale system during lunch? Who is responsible for overseeing school lunch and ensure its success?  What supports are in place if students forget lunch or lunch money?	Jessica Whalen	School Lunch
Please clarify the backup locations.	Jessica Whalen	Facility and
Please elaborate on the facility contingency plan.	Ashley Baquero	Facility and

<b>Reviewer</b>	<b>Score</b>
Jennifer Gnann	Pass
Tammi Sutton	
Steven Walker	Pass
Danielle Allen	
Cheryl Turner	
Bruce Friend	
Ashley Baquero	Pass
Alan Hawkes	
Alex Quigley	
Joe Maimone	
Lindalyn Kakadelis	
Kristen Parker	Pass
Lynn Kroeger	
Phyllis Gibbs	
Jessica Whalen	Pass
Robert McOuat	
Shannon Stein	Pass
Sherry Reeves	
Stephenie Clark	
Heather Soja	Pass

## VI. FINANCIAL PLAN

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

### Budget: Revenue Projections from each Year 1

<p><b>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</b></p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p><b>State Funds:</b> Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1<sup>st</sup> month average daily membership.</p> <ul style="list-style-type: none"> <li>In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides</li> <li>In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located.</li> </ul> <p><b>Local Funds:</b> Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p><b>Federal Funds:</b> Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p><b>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</b></p>			
	LEA #1 920 - Wake County Schools			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,233.73	494	\$2,585,462.62
	Local Funds	\$2,326.68	494	\$1,149,379.92
	Federal EC Funds	\$4,464.16	49	\$218,743.84
	<b>Totals</b>			\$3,953,586.38
	LEA #2 350 - Franklin County Schools			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,967.20	93	\$554,949.60
Local Funds	\$1,615.20	93	\$150,213.60	
Federal EC Funds	\$4,464.16	9	\$40,177.44	
<b>Totals</b>			\$745,340.64	
LEA #3 390 - Granville County Schools				
<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>	
State Funds	\$5,977.38	28	\$167,366.64	
Local Funds	\$1,565.97	28	\$43,847.16	
Federal EC Funds	\$4,370.14	3	\$13,110.42	
<b>Totals</b>			\$224,324.22	



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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>-State ADM Funds</b>	\$3,307,779	\$3,785,578	\$4,279,521	\$4,361,819	\$4,444,118
<b>-Local Per Pupil Funds</b>	\$1,343,441	\$1,537,214	\$1,737,533	\$1,770,947	\$1,804,361
<b>-Exceptional Children Federal Funds</b>	\$272,032	\$313,881	\$354,817	\$361,640	\$368,463
<b>-Other Funds*</b>	\$1,174,874	\$366,616	\$414,595	\$422,887	\$431,344
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$6,098,125	\$6,003,289	\$6,786,466	\$6,917,293	\$7,048,286

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

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	Year 1			Year 2			Year 3			Year 4			Year 5		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$90,000	\$90,000	1	\$91,800	\$91,800	1	\$93,636	\$93,636	1	\$95,509	\$95,509	1	\$97,419	\$97,419
Assistant Administrator	1	\$65,000	\$65,000	1	\$66,300	\$66,300	1	\$67,626	\$67,626	1	\$68,979	\$68,979	1	\$70,358	\$70,358
Finance Officer	1	\$45,000	\$45,000	1	\$45,900	\$45,900	1	\$46,848	\$46,848	1	\$47,754	\$47,754	1	\$48,709	\$48,709
Clerical	9	\$25,611	\$230,499	10	\$24,208	\$242,080	10	\$24,692	\$246,920	11	\$23,557	\$259,127	11	\$24,028	\$264,308
Food Service Staff	2	\$12,720	\$25,440	3	\$11,098	\$33,294	3	\$11,320	\$33,960	3	\$11,546	\$34,638	3	\$11,777	\$35,331
Custodians	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
<b>A - Total Admin and Support:</b>	<b>14</b>		<b>\$455,939</b>	<b>16</b>		<b>\$479,374</b>	<b>16</b>		<b>\$488,990</b>	<b>17</b>		<b>\$506,007</b>	<b>17</b>		<b>\$516,125</b>
Instructional Personnel:															
Core Content Teacher(s)	33	\$45,000	\$1,485,000	35	\$45,900	\$1,606,500	40	\$46,818	\$1,872,720	40	\$47,754	\$1,910,160	40	\$48,709	\$1,948,360
Electives/Specialty Teacher(s)	2	\$45,000	\$90,000	3	\$45,900	\$137,700	4	\$46,818	\$187,272	4	\$47,754	\$191,016	4	\$48,709	\$194,836
Exceptional Children Teacher(s)	1	\$45,000	\$45,000	1	\$45,900	\$45,900	2	\$46,818	\$93,636	2	\$47,754	\$95,508	2	\$48,709	\$97,418
Instructional Support	2	\$45,000	\$90,000	2	\$45,900	\$91,800	2	\$46,818	\$93,636	2	\$47,754	\$95,508	2	\$48,709	\$97,418
Teacher Assistants	2	\$19,000	\$38,000	2	\$19,380	\$38,760	2	\$19,768	\$39,536	2	\$20,163	\$40,326	2	\$20,566	\$41,132
Instructional Support (Subs)	38	\$3,042	\$115,596	41	\$5,283	\$216,603	48	\$5,302	\$254,496	48	\$5,378	\$258,144	48	\$5,453	\$261,744

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B - Total Instructional Personnel:	78		\$1,863,596	84		\$2,137,263	98		\$2,541,296	98		\$2,590,662	98		\$2,640,908
A+B = C - Total Admin, Support and Instructional Personnel:	92		\$2,319,535	100		\$2,616,637	114		\$3,030,286	115		\$3,096,669	115		\$3,157,033
Administrative & Support Benefits															
Health Insurance	11	\$2,745	\$30,195	11	\$2,803	\$30,833	11	\$2,865	\$31,515	11	\$2,923	\$32,153	11	\$2,981	\$32,791
Workers Compensation	14	\$382	\$5,348	16	\$395	\$6,320	16	\$409	\$6,544	17	\$412	\$7,004	17	\$420	\$7,140
Payroll Taxes	14	\$3,659	\$51,226	16	\$3,785	\$60,560	16	\$3,926	\$62,816	17	\$3,953	\$67,201	17	\$4,030	\$68,510
D - Total Admin and Support Benefits:			\$86,769			\$97,713			\$100,875			\$106,358			\$108,441
Instructional Personnel Benefits:															
Health Insurance	40	\$2,745	\$109,800	43	\$2,803	\$120,529	50	\$2,865	\$143,250	50	\$2,923	\$146,150	50	\$2,981	\$149,050
Workers Compensation	40	\$382	\$15,280	43	\$395	\$16,985	50	\$409	\$20,450	50	\$412	\$20,600	50	\$420	\$21,000
Payroll Taxes	40	\$3,659	\$146,360	43	\$3,785	\$162,755	50	\$3,926	\$196,300	50	\$3,953	\$197,650	50	\$4,030	\$201,500
E - Total Instructional Personnel Benefits:			\$271,440			\$300,269			\$360,000			\$364,400			\$371,550
D+E = F - Total Personnel Benefits			\$358,209			\$397,982			\$460,875			\$470,758			\$479,991
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	14		\$542,708	16		\$577,087	16		\$589,865	17		\$612,365	17		\$624,566
B+E = H - Total Instructional Personnel (Salary & Benefits)	78		\$2,135,036	84		\$2,437,532	98		\$2,901,296	98		\$2,955,062	98		\$3,012,458
G+H = J - TOTAL PERSONNEL	92		\$2,677,744	100		\$3,014,619	114		\$3,491,161	115		\$3,567,427	115		\$3,637,024

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
	Administrative & Support:					
Office:	Office Supplies	\$16,438	\$16,859	\$17,289	\$17,635	\$17,988
	Paper	\$5,000	\$5,100	\$5,202	\$5,306	\$5,412
	Computers & Software	\$13,350	\$0	\$0	\$0	\$0
	Communications & Telephone	\$60,000	\$61,200	\$62,424	\$63,672	\$64,946
	Copier leases	\$12,300	\$12,546	\$12,797	\$13,053	\$13,314
Management Company	Contract Fees	\$0	\$180,099	\$339,323	\$466,917	\$563,863
Professional Contract	Legal Counsel	\$25,000	\$5,000	\$5,100	\$5,202	\$5,306
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$17,000	\$30,340	\$30,947	\$31,566	\$32,197
	Other / Start-Up	\$73,753	\$73,793	\$73,834	\$3,122	\$3,185
	Other Professional	\$0	\$0	\$0	\$0	\$0
Facilities	Facility Lease/Mortgage	\$956,517	\$1,096,360	\$1,213,836	\$1,240,014	\$1,246,557
	Maintenance	\$95,664	\$97,577	\$99,529	\$101,519	\$103,550
	Custodial Supplies	\$34,108	\$34,790	\$35,486	\$36,196	\$36,920
	Custodial Contract	\$98,853	\$100,830	\$102,846	\$104,903	\$107,001
	Insurance (pg19)	\$31,800	\$33,237	\$33,902	\$34,580	\$35,271
	Other	\$429,700	\$170,130	\$128,793	\$113,988	\$115,718
Utilities	Electric	\$93,671	\$95,544	\$97,455	\$99,404	\$101,393
	Gas	\$0	\$0	\$0	\$0	\$0
	Water/Sewer	\$10,762	\$10,977	\$11,197	\$11,421	\$11,649
	Trash	\$22,720	\$23,175	\$23,638	\$24,111	\$24,593
Transportation	Buses	\$54,000	\$55,080	\$56,182	\$57,305	\$58,451
	Gas	\$0	\$0	\$0	\$0	\$0
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$138,375	\$17,213	\$17,213	\$12,000	\$12,000
	Child nutrition	\$190,656	\$217,662	\$245,672	\$250,586	\$255,598
	Travel	\$25,000	\$25,500	\$26,010	\$26,530	\$27,061
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$2,404,667	\$2,363,012	\$2,638,675	\$2,719,030	\$2,841,973
	Instructional:					
Classroom Technology	Computers	\$0	\$0	\$0	\$0	\$0

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	Software	\$0	\$0	\$0	\$0	\$0
	Instructional Technology	\$557,066	\$151,240	\$162,534	\$208,533	\$208,533
	Other	\$0	\$0	\$0	\$0	\$0
Instructional Contract	Instructional Support	\$0	\$0	\$0	\$0	\$0
	Staff Development	\$15,000	\$15,300	\$15,606	\$15,918	\$16,236
	Contracted Sped Instruction	\$48,050	\$55,335	\$62,086	\$63,328	\$64,594
Books and Supplies	Instructional Materials	\$287,660	\$158,929	\$171,731	\$216,155	\$220,478
	Curriculum/Texts	\$2,000	\$2,040	\$2,081	\$2,122	\$2,165
	Copy Paper	\$0	\$0	\$0	\$0	\$0
	Testing Supplies	\$13,530	\$15,484	\$17,510	\$17,860	\$18,217
	Other	\$8,000	\$8,160	\$8,323	\$8,490	\$8,659
	L - TOTAL Instructional Operations	\$931,306	\$406,488	\$439,871	\$532,406	\$538,882
	K+L = M - TOTAL OPERATIONS	\$3,335,973	\$2,769,500	\$3,078,546	\$3,251,436	\$3,380,855

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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
J - TOTAL PERSONNEL	\$2,677,744	\$3,014,619	\$3,491,161	\$3,567,427	\$3,637,024
M - TOTAL OPERATIONS	\$3,335,973	\$2,769,500	\$3,078,546	\$3,251,436	\$3,380,855
J+ M =N TOTAL EXPENDITURES	\$6,013,717	\$5,784,119	\$6,569,707	\$6,818,863	\$7,017,879
Z - TOTAL REVENUE	\$6,098,125	\$6,003,289	\$6,786,466	\$6,917,293	\$7,048,286
Z - N = SURPLUS / (DEFICIT)	\$84,408	\$219,170	\$216,759	\$98,430	\$30,407

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

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

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

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

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

We plan to focus on the student population residing in and around the Wake Forest community located in north Wake County. The bordering counties of Franklin and Granville are also included in our projected student population. We chose the community of Wake Forest due to its current student-aged population and population growth rate, as well as the overcrowding and below-average performance of the public schools in the area. Within the 15-minute drive-time of the projected site, the percentage of the population of school-aged children (5 - 14) is approximately 17%, and the population growth rate within this same area is projected to be approximately 2.7% annually between 2018 and 2023. In addition, the average capacity utilization for all public schools that serve grades K-8 within 15 minutes is currently at 96%, which shows that there is definite demand for additional student stations. Furthermore, the average SPG for these schools is currently a C, which indicates a need for an additional quality school choice option within the community.

We determined our school's total enrollment after considering various school models developed by our EMO. CSUSA's 20 years of management experience have allowed it to create specific school sizes for each model. These models have been developed to ensure that each grade level has a consistent size to allow students to matriculate over time. This also ensures an appropriate number of classes per grade level to allow optimal staffing of teachers, particularly in elective courses (music, art, PE, etc.) and middle school. In addition, CSUSA has shown the ability to consistently fill schools of this size throughout their network. The school model/size that we chose for NRCA was determined after a thorough population analysis was performed.

The results of that analysis drove our decision on the enrollment projections. To fully enroll NRCA, a facility of 765 students would only have to attract 4% of the children aged 5 - 14 (i.e. ages in grades K-8) within a 15-minute drive time of the local area.

Assuming school capacity of 765, a footprint of approximately 39,860 square feet, and maintaining student teacher ratios of 18:1; our breakeven is

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approximately 490 students.

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

AOC

In the event that the anticipated revenues are lower than expected, a budget realignment of expenditures to the revised revenue stream would be in order. Measures would include re-evaluation of staffing needs or postponement of hiring and a reduction in enrollment driven expenses such as textbooks, consumables, fees and subscriptions, food service, technology and equipment needs, etc. Additionally, other previously non-contemplated sources of revenue, such as grants and contributions would be exercised. In addition, CSUSA, as set forth in our management agreement, will stand behind the school and carry its operating costs in the event this is necessary to achieve a balanced budget.

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

AOC

The operational budget is primarily based on the projected state, county, and federal funds and does not rely on other sources of funds to operate NRCA. However, the budget does include revenues and expenditures from both before and after care and food service, which are voluntary programs whose revenues and expenditures adjust together based on participation thus they do not have any material impact to the operational budget. In addition, the budget does assume the school will obtain short-term financing to cover the year 1 initial purchases of capital equipment (technology and furniture) to outfit the school totaling \$854,515. The repayment of these purchases is included in the budget provided in this application. The ability to secure this financing is a benefit of our relationship with CSUSA who has secured financing from various sources in order to complete the equipping of charter school facilities it opens and operates. Sources of financing have included: i) issuance of taxable and tax-exempt bonds to finance the acquisition of educational facilities and associated equipment, to-date, CSUSA has participated in the issuance of approximately \$880 million of taxable and tax-exempt bonds; ii) use of an available revolving line of credit; iii) commercial bank financing in some cases backstopped by a guarantee from either the EMO or its affiliated development company; iv) financing provided by either the EMO or the development company and v) financing provided by a construction partner. Appendix M provides the assurance that CSUSA will provide the necessary financial support to the school to ensure its ability to operate.

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

The budget is based upon an average ratio of 18:1.

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

AOC

Yes. General provisions for purchasing requisitions depend upon the

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

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magnitude of the purchase. For purchases between \$1,000 and \$4,999, two written quotes are to be obtained and submitted along with a purchase requisition. For purchases over \$5,000, three written quotes are to be submitted.

Financial audits are conducted annually by an independent certified public accountant determined by the Board. The Board may also select an audit committee to oversee the audit.

The budget also contemplates ongoing contracted special education services such as speech therapy and psychotherapeutic services. These contracts depend upon the needs of the school.

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

AOC

The budget reflects a financial commitment to ensuring that students receive an academically rigorous education that advances their academic and social development. In Year 1, the budget assumes \$931,306 for instructional operations. Thereafter, the budget assumes an average annual expenditure of nearly \$480,000 per year for instructional operations. Instructional technology, specifically, represents 60% of the Year 1 instructional budget. Integration of technology allows students to have targeted access to curricular resources, assessment, technology-based intervention and enrichment enhancing differentiation. Teachers are trained to integrate technology carefully and strategically into the student-learning environment to increase academic achievement for each student.

Regarding transportation, we recognize that transportation can inhibit NRCA's enrollment objectives. Therefore, the budget does contain an average of \$54,000 per year to accommodate potential transportation needs.

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

AOC

Our operational goal is to achieve a minimum cumulative fund balance of 8% of operating expenses by Year 3, as required the NC Local Government Commission policy. This will be achieved by developing and administering a comprehensive and balanced budget on an annual basis. The budget shall include all forms of revenue and all expenditures, including (i) Total Revenues; (ii) Operating Expenses; (iii) Reserve Expenses, (iv) Audit Expenses and (v) Fund Balance. Amendments to the budget require the approval of the Board. The budget will be prepared conservatively and with viability and sustainability of the school in mind. Maintaining alignment of all of these budgetary components is how the fund balance will be developed in accordance with school objectives.

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

The Board will not finance the construction or purchase of the facility. The Board will lease the facility and will not own the facility. Rent is projected at 15% of revenues in all years. The only debt financing in the proposed budget is for the purchase of school technology infrastructure,



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hardware, software, furniture, and equipment. The proposed budget includes a 5-year conventional loan for \$854,515 at a projected interest rate of 5.5%. This loan is assumed to be commercial bank financing and, in some cases, may be backed by a guarantee from either CSUSA or a third party developer. If necessary, the Board will request CSUSA's assistance in locating a third party developer, as CSUSA has worked with and has access to many.

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

AOC

Other than the sources identified herein, the school does not anticipate obtaining assets from any other sources.

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

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

AOC

We have contracted with CSUSA to provide financial management services. CSUSA has well-established processes and procedures to ensure fiscal responsibility and sound internal controls. We will approve a financial policy manual, which will include, at a minimum: establishment of a modified accrual accounting system, a chart of accounts that aligns with DPI's system, internal controls that establish segregation of duties and authorization and processing of disbursements, establishment of a payroll system, and process for meeting the DPI data reporting requirements.

To ensure proper internal controls, policies will be adopted which include General Governmental Accounting Policies, Financial Reporting, Budgeting, Cash Receipts and Deposits, Purchasing and Cash Disbursements, Capital Assets and Payroll.

Adherence to the budget will be enforced and monitored monthly via review protocols. CSUSA will provide financial statements to school leadership and the Board on a monthly basis which will allow stakeholders to review budget vs. actual results. Review meetings will also be held between the EMO and school leadership on a consistent basis to discuss any budget variances.

The Cash Receipts/Deposits and Purchasing/Cash Disbursements policies will address segregation of duties. Examples of controls in these areas include ensuring that staff handling deposits or disbursements are also not entering journal entries or preparing financial statements; prohibiting staff setting up new vendors from processing disbursements; and requiring that purchase orders for purchases over \$300 be approved by the EMO and school. At the school administration level, cash receipt deposits will be made when the total funds to be deposited reaches \$500 or at least once a week.

To further ensure safeguarding of cash, the school will have Positive Pay on all bank accounts. This fraud deterrent matches the checks the school issues with what was presented for payment. As asset purchases are completed, detailed lists are maintained by the EMO's Operations Department and Finance Department for adherence with the Capital Assets Policy.

Payroll and Human Resources internal controls procedures include hiring and advancing personnel, recording and maintaining accurate records, preparing payroll, paying employees and payroll taxes to taxing authorities, as well as payments to other parties for benefits. To ensure proper control and reduce the risk of fraud, these duties are segregated among the following departments: human resources, payroll, treasury, and accounting. The Payroll Department finalizes the amounts to be paid to employees based on information provided by timekeeping software. CSUSA's Treasury Department reviews and approves amounts to be funded from the operating bank account to the payroll bank account. The Accounting Department confirms that all payroll transactions are properly recorded and reported on financial statements.

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Financial records are maintained at the school and also by CSUSA. All transactions will be recorded in CSUSA's accounting software, Microsoft Dynamics Solomon. Internal controls are also maintained through standardized reporting formats, password and processing controls, and other application controls that are included in the accounting software.

Financial reports will be audited on an annual basis by an independent Local Government Commission-approved auditing firm selected by the Board. We will provide the information of the auditor as required by DPI. The annual audit will be completed and filed with the Local Government Commission and DPI by October 31 following the completed fiscal year ending June of the same year.

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

There are no related party transactions.

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

Keefe McCullough & Co., LLP, CPAs  
6550 North Federal Highway  
4th Floor  
Ft. Lauderdale, FL 33308  
Main Number 954-771-0896  
Fax 954-938-9353

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Where will the EC Federal funds money be made up in the first year as this money will not be available until year 2?	Jessica Whalen	Total Budget
Where is EL director or support staff included in the budget?  It is not clear if bus costs include staff pay in the budget. Please clarify where bus driver fee is included in the budget.  Finance officer is listed in budget but not in staff plan.  Who is responsible for facility cleaning as there is no custodian in the budget?	Jessica Whalen	Personnel Bu
What is the retirement plan or 401K plan? If there is not one, how will you attract and retain talent in your staff?	Heather Soja	Personnel Bu
No custodial staff or apparent contract for custodial company?	Shannon Stein	Personnel Bu
What all is included in bus projections? Does this include gas, maintenance, and staff pay?  I am concerned that there is no money budgeted for classroom computers and software yet NCRA's mission details using a "technology-rich methodology to meet student needs".  What is included in instructional technology? How many are provided for each classroom?  Where are ELL support services included in the budget?  Where is the audit included in the budget?	Jessica Whalen	Operations B
Using a custodial contract. What is Other/Start Up? What is "Other" in facilities?	Steven Walker	Operations B
There is a significant cost (\$429,700) for year #1 facilities "other"; what is that for?	Shannon Stein	Operations B
In what year will the fees to the management company level out and the school can build up a fund balance?	Jennifer Gnann	Total Expend

<b>Reviewer</b>	<b>Score</b>
Jennifer Gnann	Pass
Heather Soja	Pass
Steven Walker	Pass
Danielle Allen	
Cheryl Turner	
Bruce Friend	
Ashley Baquero	Pass
Alan Hawkes	
Alex Quigley	
Joe Maimone	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Shannon Stein	Pass
Robert McQuat	
Jessica Whalen	Fail
Phyllis Gibbs	
Lynn Kroeger	
Kristen Parker	Pass

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Lindalyn Kakadelis	
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## VII AGREEMENT PAGE

### **Application Fee:**

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

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

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

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

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

trianglecharter

Date: 10/01/2018

### **Applicant Signature:**

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

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

Print/Type Name: trianglecharter

Board Position: Board Chair

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

Date: 10/01/2018

Sworn to and subscribed before me this

North Raleigh Charter Academy - NRCA's mission is to build a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology-rich methodology tailored to meet their needs.

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

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

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

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

## OVERALL ASSESSMENT

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

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

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

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

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

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

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

### **Initial Screening**



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<b>Mission, Purposes, and Goals</b>	- danielle_allen
<b>Education Plan</b>	- danielle_allen
<b>Governance and Capacity</b>	- danielle_allen
<b>Operations</b>	- danielle_allen
<b>Financial Plan</b>	- danielle_allen
<b>OVERALL</b>	- danielle_allen - danielle_allen

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Please detail further how technology is utilized and incorporated to deliver instruction and/or tailor to student needs? - pttsj3</p> <p><u>Educational Need and Targeted Student Population</u> How can the applicant demonstrate that the local LEA is not already offering both the personalization and/or data-driven instruction? - shannon_stein</p> <p><u>Educational Need and Targeted Student Population</u> Applicant needs to clarify: What evidence is there to support a difference in approach from the current LEA? What evidence is there to state/show that the current LEA is not providing individualized, data driven instruction? - kzparker718</p> <p><u>Educational Need and Targeted Student Population</u> What aspects of this program is not currently offered in surrounding schools? - jengnann</p> <p><u>Educational Need and Targeted Student Population</u> What makes this "technology-rich learning environment" unique from traditional public schools?</p> <p>Who will create each Personalized Learning Plan? Who will implement and own the collaboration needed for each PLP? Who will guide students in owning their data and "developing the skills necessary to conduct their own PLP conferences? If this is a teacher responsibility, will teachers be given time and training to effectively implement this aspect of the educational program? - ashley_baquero</p> <p><u>Educational Need and Targeted Student Population</u> Need more sufficient evidence to demonstrate a need for this charter.</p> <p>Who is responsible for making Personalized Learning Plans?</p> <p>Please clarify what the following looks like and examples: "Teachers will have ready access to vetted programs, tools, products, and approaches used to increase student</p>
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	<p>engagement and make connections to real-life applications." - pttsj3</p> <p><u>Educational Need and Targeted Student Population</u> Great summary of detailed data! - dswalker</p> <p><u>Educational Need and Targeted Student Population</u> Would like to know more detail in the personalized learning plan that will make different from traditional counterparts? - heather_soja</p> <p><u>Purposes of Proposed Charter School</u> Please clarify where "baseline achievement levels to include in students PLPs" are coming from in the first year.</p> <p>Please clarify where "student formative data is posted to support student goal-setting" and describe how students will be conditioned or supported with their data potentially being publicly displayed.</p> <p>How are tiers identified, how is the tier system evaluated, and who is responsible for overseeing the support system?</p> <p>What is the difference between Saturday tutoring sessions and boot camp tutoring sessions? What additional supports are in place to ensure ED students are able to access these sessions?</p> <p>Please describe further exactly what is Success Time and what it looks like.</p> <p>- pttsj3</p> <p><u>Purposes of Proposed Charter School</u> There is not anything specifically innovative about these details but actually implementing these consistently and utilizing the data is a novel idea in the current education environment that seems to plague our traditional counterparts. - heather_soja</p> <p><u>Goals for the Proposed Charter School</u> When you say that "building standards" must be met; what is that?</p> <p>NRCA plans on a goal of meeting or exceeding local, demographically similar schools; could you be more specific since there is a wide variety of schools in that area to compare to (i.e. how will you know if you are specific?)?</p> <p>What is your fund balance goal?</p> <p>What type of expectations do you have for the audit (i.e. not exceptions, etc.) other than reviewing it?</p> <p>Are there any Board specific training expectations? - shannon_stein</p> <p><u>Goals for the Proposed Charter School</u> Goals are not adequate SMART goals.</p> <p>How are growth targets calculated?</p>
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<p><b>Education Plan</b></p>	<p>How will the board know the Strategic Plan/School Improvement Plan that is adopted is followed? - pttsj3</p> <p><u>Instructional Program</u>          Applicant needs to clarify: What assessments will be used to diagnose/determine students mastery against the standards?</p> <p>Applicant needs to clarify: Is there a specific curriculum that the school will be using? - kzparker718</p> <p><u>Instructional Program</u>          The instructional program is detailed and ambitious. Will your school utilize academic deans or coaches to ensure teachers can meet the high expectations of this plan? Will teachers be allotted adequate planning time to allow the implementation of this plan?          - ashley_baquero</p> <p><u>Instructional Program</u>          It is not clear on the exact curriculum that will be used.          All curricula should be guaranteed and viable. Please clarify. What makes the curriculum you are using guaranteed and viable?</p> <p>Where does technology fit in the instructional program? It is mentioned how technology is used to support student learning (remediation or reteaching) but it is not described how it is used to engage students in rich use of technology. What sets North Raleigh apart in their incorporation of technology? How is blended learning incorporated with no student computers in the budget?</p> <p>Please clarify what the "Plan-Do-Check_Act model" looks like?          - pttsj3</p> <p><u>Curriculum and Instructional Design</u>          Please clarify: "With monitoring from the classroom teacher, students can take courses online through Plato for enrichment or course recovery." What does this look like? When does this occur?</p> <p>What support is offered for teachers to implement "Dr. Marzano's 13 high-probability instructional strategies" if they are struggling to implement them?</p> <p>How are teachers supported in cross-curricular instruction?</p> <p>When will "students of different ability levels work jointly to improve their understanding of a subject" if classes are based on abilities? When will this occur?</p> <p>Please detail further the following: "To further ensure students are on pace for mastery, teachers will plan and schedule learning objectives aligned to the PDCA model described in Appendix O"</p> <p>How will ED parents or families with no internet access access report cards through the parent portal online?          - pttsj3</p> <p><u>Special Programs and "At-Risk" Students</u></p>
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	<p>Please provide more information to what a typical day looks like and the incorporation of tier support system, success time?</p> <p>How will low income students be accommodated to ensure participation in Saturday tutoring or extended days? Who is carrying out these types of interventions?</p> <p>How does the RtI block affect classroom instruction? When will it occur?</p> <p>How will you decrease burn-out with students/parents with all of this after school and weekend tutoring?</p> <p>What supports are in place to ensure low income parents are able to come in at least quarterly for monitoring plans and parent conferences?</p> <p>Who conducts/monitors the ELL program?</p> <p>Please provide more detail and clarity in how ELL students who exit ELL program are monitored? - pttjs3</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>Please clarify who consists of the "team that is formed to collaboratively address the needs of students who display learning and/or behavioral challenges."</p> <p>Who is responsible for making IEPs?</p> <p>"Periodic assessments are conducted during the intervention period to evaluate whether the student is responding to the interventions and to determine if the strategies are successful." Who makes and through what platform are these assessments made? How long is the intervention period and what is the resulting determination from this period if strategies are successful or not? Need additional clarity. - pttjs3</p> <p><u>Exceptional Children – Education Programming</u></p> <p>The application indicates "Small groups are used for more individualized instruction when necessary with additional support provided by EC staff or instructional coaches when needed." What are the components of the full continuum of service delivery? How does your school plan to provide those components? The personnel budget indicates one EC staff. How will one person provide the full continuum across all grade levels? - robert_mcouat1</p> <p><u>Exceptional Children – Education Programming</u></p> <p>Please clarify the following: "Teachers provide additional instruction outside of the standard instructional block through content area integration, during enrichment activities or lunch, and any other opportunity to support student achievement of individual learning goals." What does content integration look like? What does this mean for struggling students and their enrichment blocks? How will lunch or this particular block be affected if students may always need additional help?</p> <p>How often does the collaboration between EC teachers and general ed teachers occur? Does this include contracted EC teachers as well?</p> <p>Who makes up the team that form the collaborative decision making team for students protected under Section 504?</p>
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	<p>How will you ensure one EC teacher adequately serves 61-62 EC students? - pttsj3</p> <p><u>Student Performance Standards</u>          Applicant needs to clarify: What assessments will you use to gain an understanding of what students have/have not mastered in regards to standards already taught throughout the year? MAP assesses and adapts to where a student is and can show growth but not directly in relation to the standards taught. - kzparker718</p> <p><u>Student Performance Standards</u>          There is a great emphasis on assessments and data, how will NCRA deal with and decrease burn-out or too much testing stigma?</p> <p>Who conducts the weekly or bi-weekly data chats? Who is responsible for analyzing the data?</p> <p>What electives are offered?</p> <p>How is course recovery conducted?</p> <p>- pttsj3</p> <p><u>Student Conduct and Discipline</u>          Would infractions of school rules not have to be "repeated" offenses to reach the severity necessary to be considered for suspension/expulsion? - shannon_stein</p> <p><u>Student Conduct and Discipline</u>          Please explain further Core Fundamentals. - jengnann</p> <p><u>Student Conduct and Discipline</u>          This section was the first section that detailed a sense of community. How is this evident from day to day at NCRA?</p> <p>How will NCRA deal with behavior that is still disruptive but not worthy of suspensions/expulsions?</p> <p>Please clarify the following: "All discipline decisions, especially those related to students with disabilities, will be determined on a case-by-case basis. NRCA will adhere to all federal and state laws regarding discipline of all students, including students protected under IDEA and 504 legislation. To the extent that they also take such action for children without disabilities, NRCA personnel may, for not more than 10 school days in a row, remove a child with a disability who violates a provision of the Code of Student Conduct from his or her current placement to an appropriate interim alternative educational setting, another setting, or suspension. Additional removals of the child of not more than 10 school days in a row in that same school year for separate incidents of misconduct may be imposed, as long as those removals do not constitute a change of placement. Once a child with a disability has been removed from his or her current placement for a total of 10 school days in the same school year, NRCA will provide, during any subsequent days of removal in that school year, services to the extent required." When does the manifest meeting happen?</p> <p>Who conducts and/or is a part of the informal hearings for short term suspensions? - pttsj3</p>
<p><b>Governance and</b></p>	<p><u>Certify Governance</u></p>

<p><b>Capacity</b></p>	<p>What assurances does the board have that they can effectively oversee the opening of two new schools in one year? - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Since the Board is the Triangle Charter Education Association &amp; there is work with an EMO, is there concern about one Board having to make decisions and have representation for two schools? - shannon_stein</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Please elaborate on the number of schools the board governs. Will there be separate board meetings for each school? - ashley_baquero</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Please clarify and detail further the power structure between CSUSA, the board, and the Triangle Charter Education.</p> <p>What experience do you feel your board needs more of? Are there plans to increase legal experience in the future?</p> <p>"CSUSA will remove the principal if the Board is reasonably dissatisfied with his/her performance." How is this determined. What if CSUSA, the board, and/or Triangle Education are at odds?</p> <p>How are parents recruited for the parent teacher committee and/or focus groups? How will you ensure participation from all walks of life (i.e. ED parents)?</p> <p>What does the board recruitment process look like and/or entail?</p> <p>Please explain the rationale for the parents to go to CSUSA before the board on grievances. - pttsj3</p> <p><u>Proposed Management Organization (EMO/CMO)</u>          Please explain the fund balance decreases from FY 16 to FY 17. - jengnann</p> <p><u>Proposed Management Organization (EMO/CMO)</u>          Based on the following, "The three turnaround schools in Indiana are CSUSA's lowest performing. Managed since 2012-13, more than 90% of the students qualify for free and reduced lunch, and the student body is 53% minority. Collectively, the Indiana schools have made outstanding progress, far exceeding one years annual growth on NWEA MAP assessments. In 2017, approximately 110% of growth targets were met in reading and 119% in math, the equivalent of over one years worth of growth. School grades at the Indiana schools were markedly improved from prior years. Two schools earned passing grades for the first time in the last decade. Preliminary results for the 2017-18 school year are indicative of continued improvements." How will NCRA ensure ED students are supported and performing as suspected as being ED may be a factor to CSUSA lowest performing schools?</p> <p>How does the board oversee financial decisions or is this strictly CSUSA's responsibility? If it is CSUSA's responsibility, explain rationale.</p> <p>Please detail what it looks like to be employed by two different entities. How does this work in regards to benefits? - pttsj3</p> <p><u>Charter School Replication</u></p>
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	<p>For the 2017-2018 school year, why was the % of students that recommitted so much lower than the year before? - shannon_stein</p> <p><u>Charter School Replication</u> Why has Cardinal's enrollment been decreasing over the past few years? - jengnann</p> <p><u>Charter School Replication</u> Please detail ED, ELL, and SWD percentages.</p> <p>Why has enrollment decreased at Cardinal Charter? Why has the number of new applications received also decreased? Please explain why commitments have decreased as well.</p> <p>The following is not evident in regards to ED population: "Our Board is currently operating a school [Cardinal Charter] which serves a similar student population." What will NCRA do differently to ensure ED students are supported adequately when ED population may be double that of Cardinal Charter? - pttsj3</p> <p><u>Staffing Plans, Hiring, and Management</u> Since the administrative staff are CSUSA employees, what "voice" will the Board have if there are concerns about performance?</p> <p>What flexibility does the Board have for staffing depending on student needs (i.e. ESL, EC, etc.)? - shannon_stein</p> <p><u>Staffing Plans, Hiring, and Management</u> The number of EC/AIG teachers seems low for this population. - jengnann</p> <p><u>Staffing Plans, Hiring, and Management</u> Will one EC teacher suffice for 600+ students? - ashley_baquero</p> <p><u>Staffing Plans, Hiring, and Management</u> finance officer is not in staffing plan but in budget?</p> <p>school operations administrator is not in the budget.</p> <p>Please detail what the before/aftercare-director and before-aftercare entails. Will NCRA have an afterschool care for students? Please explain rationale.</p> <p>How will you ensure EC teachers are effective and adequately support all EC students given the amount of EC students?</p> <p>CSUSA vet teachers and the Board hires them but then what? Please clarify the relationship between teachers, board, and CSUSA.</p> <p>How will teachers not receiving benefits for the first two months affect recruitment?</p> <p>How are EL students supported and monitored if there is no EL teacher or coordinator? Who will be doing this?</p> <p>Who is responsible for overseeing the licensure requirements or renewal for teachers? What does this look like? - pttsj3</p>
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Staff Evaluation and Professional Development

Who are the designated mentors? How are they determined?  
When does this mentoring occur?

Who conducts the teacher evaluation training and when does this occur?

How will a "master teacher" be determined?

A big chunk of time for the principal seems to be spent on developing teachers. How will this affect other areas or responsibilities of the principal?

- pttsj3

Parent and Community Involvement

How will you ensure effective communication with families whose first language is not English? - ashley\_baquero

Parent and Community Involvement

Please detail other options to adequately reach all parents if they have no internet access or email.

"All parents agree to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents shall be strongly encouraged to volunteer a total of 30 hours per school year. Parents can track volunteer hours via the student information system." What will parents be doing as they volunteer? If a parent does not do these hours, what happens? If parents are having trouble completing hours or getting to the school or destination to complete hours, what supports are available? - pttsj3

Admissions Policy

What other options can be provided to submit applications if parents or students do not have internet to apply online.

Please explain rationale: "If a family leaves NRCA and wishes to re-enroll at the school, the family must submit a new application, be placed on the waiting list, and then wait until a seat becomes available for their child. A student who was enrolled in the charter school within the two previous school years but left the school (i) to participate in an academic study abroad program or a competitive admission residential program or (ii) because of the vocational opportunities of the student's parent may re-enroll without submitting a new application or being placed on the waitlist." - pttsj3

Projected Student Enrollment (Table)

What happens if all the students in grade 05 matriculate to grade 06? (i.e. you would be over projections) - shannon\_stein

Projected Student Enrollment (Table)

Why do you expect a decrease in enrollment from 5th to 6th grade? - jengnann

Projected Student Enrollment (Table)

What is the rationale for having grades K, 6-8 not have as many students as grades 1-5?

This projection calls for max enrollment in the first year, how will you ensure this? How will staffing plans change if enrollment is not met? - pttsj3

Weighted Lottery

It is not evident and clear that NCRA is reducing barriers for enrollment for low-income



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	<p>families (i.e. application must be submitted online, parent volunteers, etc.)</p> <p>"Applicants that select ED priority status will be required to consent to household income verification by designated school staff to verify FRL status. Only designated staff will have access to this information." Who confirms or is in charge of this? What does this look like? - pttsj3</p> <p><u>Weighted Lottery</u> Is this the first time a CSUSA partner school has proposed a weighted lottery? - dswalker</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> Does the Board feel that the transportation plan is consistent with the demographics and desire to have a purposeful EDS population? - shannon_stein</p> <p><u>Transportation Plan</u> Do you have data on transportation needs thus far?</p> <p>When is the decision made to get a bus?</p> <p>Does the bus funds provided include gas and/or maintenance?</p> <p>What evidence do you have that the following will more for a majority of students: "If transportation is offered, the school will restrict transportation of students to those who live within a reasonable distance, generally considered to be within a 2 - 4-mile walkout radius of the school, and those students subject to a hazardous walking condition. The school may provide transportation to students outside of the reasonable distance when transportation is necessary to provide adequate educational facilities and opportunities which otherwise would not be available. Transportation will be provided for students with disabilities enrolled in the school as required by the students IEP"? - pttsj3</p> <p><u>School Lunch Plan</u> Does the Board feel that the food plan is consistent with the demographics and desire to have a purposeful EDS population? - shannon_stein</p> <p><u>School Lunch Plan</u> "The facility plan will include a multipurpose room which will mainly be used as a spacious cafeteria and also serve as a gym." How will this work? How will this affect students who may gym during another lunch wave?</p> <p>Who is responsible for point-of-sale system during lunch? Who is responsible for overseeing school lunch and ensure its success?</p> <p>What supports are in place if students forget lunch or lunch money? - pttsj3</p> <p><u>Facility and Facility Contingency Plan</u> Please elaborate on the facility contingency plan. - ashley_baquero</p> <p><u>Facility and Facility Contingency Plan</u> Please clarify the backup locations. - pttsj3</p>
<p><b>Financial Plan</b></p>	<p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Where will the EC Federal funds money be made up in the first year as this money will not be available until year 2? - pttsj3</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u></p>

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	<p>No custodial staff or apparent contract for custodial company? - shannon_stein</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Where is EL director or support staff included in the budget?</p> <p>It is not clear if bus costs include staff pay in the budget. Please clarify where bus driver fee is included in the budget.</p> <p>Finance officer is listed in budget but not in staff plan.</p> <p>Who is responsible for facility cleaning as there is no custodian in the budget? - pttsj3</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> What is the retirement plan or 401K plan? If there is not one, how will you attract and retain talent in your staff? - heather_soja</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> There is a significant cost (\$429,700) for year #1 facilities "other"; what is that for? - shannon_stein</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What all is included in bus projections? Does this include gas, maintenance, and staff pay?</p> <p>I am concerned that there is no money budgeted for classroom computers and software yet NCRA's mission details using a "technology-rich methodology to meet student needs".</p> <p>What is included in instructional technology? How many are provided for each classroom?</p> <p>Where are ELL support services included in the budget?</p> <p>Where is the audit included in the budget? - pttsj3</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Using a custodial contract. What is Other/Start Up? What is "Other" in facilities? - dswalker</p> <p><u>Total Expenditure Projections (Table)</u> In what year will the fees to the management company level out and the school can build up a fund balance? - jengnann</p>
<p><b>OVERALL</b></p>	<p><u>Grade Levels Served and Total Student Enrollment:</u> Please explain rationale in opening school to serve elementary and middle grade students in the first year of operation. - pttsj3</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Would like more information on the projected numbers? Interest surveys and commitments? Not just waiting lists from other charter school. - heather_soja</p> <p><u>Certify Application</u> Would like to know more about projected numbers and whether they are realistic. - heather_soja</p>

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

<b>Overall Summary</b>	
<b>Initial Screening</b>	The Office of Charter Schools deemed this application complete on October 5, 2018.
<b>Application Review</b>	<p>Dr. Allen stated that North Raleigh Charter Academy is proposed to locate in Wake County. Dr. Allen gave a brief introduction of the schools proposed enrollment and grade levels. There is not a LEA impact statement and there is not a due diligence report for this applicant. Dr. Allen reviewed the pass/fail ratings for this applicant. She stated the applicant is requesting replication and is a repeat applicant that previously applied for Cardinal Charter West. She stated they plan to partner with Charter Schools USA.</p> <p>Dr. Allen stated that Wendell Falls Charter Academy is proposed to locate in Wake County. Dr. Allen gave a brief introduction of the schools proposed enrollment and grade levels. There is not a LEA impact statement and there is not a due diligence report for this applicant. Dr. Allen reviewed the pass/fail ratings for this applicant. She stated the applicant is requesting replication and is a repeat applicant that previously applied for Cardinal Charter West. She stated they plan to partner with Charter Schools USA.</p> <p>* Mr. Allen Taylor introduced himself as the Board Chair. He spoke about the governance structure of the board. He deferred to the principal to answer some educational questions. The principal, Becky Draper, of Cardinal Charter spoke about the educational plan of the school and the important educational goals of the school.</p> <p>* Mr. Walker asked about the data on the communities the school had in its application. Mr. Taylor stated you can buy that type of data. He spoke about how the research was so important for determining the site locations.</p> <p>Motion: Committee motion to allow North Raleigh Charter Academy and Wendell Falls Charter Academy to continue to full interview.</p> <p>Motion: Steven Walker</p> <p>Second: Heather Vuncannon</p> <p>Vote: Unanimous Pass Committee Vote</p>

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	<p>Motion: Full CSAB motion to allow North Raleigh Charter Academy and Wendell Falls Charter Academy to continue to full interview.          Motion: Steven Walker          Second: Lynn Kroeger          Vote: Unanimous Pass</p>
<p><b>Application Interview</b></p>	<p>Dr. Allen stated that North Raleigh Charter Academy is proposing to locate in Wake County. Dr. Allen gave a brief introduction of the schools proposed enrollment and grade levels. There is not a LEA impact statement and there is not a due diligence report for this applicant. Dr. Allen reviewed the pass/fail ratings for this applicant. She stated the applicant is requesting replication and is a repeat applicant that previously applied for Cardinal Charter West. She stated they plan to partner with Charter Schools USA.</p> <p>* Mr. Walker asked about the need in the area because there are several other charter schools in the area. Mr. Taylor stated the population is very dense in the area and the school would serve a diverse population through its weighted lottery. He also stated they would have a traditional school calendar that will draw families because there are no other traditional calendars in that area.</p> <p>* Ms. Turner appreciates the effort the board is making to reach out to all kids. Ms. Turner stated she remembers the other schools that never came to fruition. She is concerned that two schools at once would be too much. Ms. Sutton agreed. She also stated she would like to see the schools meet or exceed growth before opening two more.</p> <p>* Mr. Taylor stated it is very difficult to find property and it will be very difficult to find again. Ms. Reeves stated that is the same argument they had with the Cary school that never opened.</p> <p>* Mr. Maimone stated he appreciates the fact they did not give up and went back to the drawing board to make a plan to work.</p> <p>24</p> <p>* Mr. Friend stated he believes in the importance of the board having a connection to the community in which they will operate. Mr. Taylor stated they are reaching out to board members in the area.</p>
<p><b>OVERALL</b></p>	<p>Motion: The CSAB moves North Raleigh Charter Academy forward to Ready to Open.          Motion: Lindalyn Kakadelis          Second: Bruce Friend          * Ms. Reeves stated she cannot support two schools at the same time.          Vote: Bruce Friend, Heather Vuncannon, Steven Walker, Lindalyn Kakadelis, Phyllis Gibbs, Alan Hawkes          Opposed: Cheryl Turner, Lynn Kroeger, Sherry Reeves, Tammi Sutton          6-4 Pass</p>