



### 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:

Jonathan Bryant  
Tammi Sutton  
Jessica Kelly  
Danielle Allen  
Bruce Friend  
Austin Smigel  
Alex Quigley  
Jonathan Bryant  
Lindalyn Kakadelis  
Kristen Parker  
Phyllis Gibbs  
Robert McOuat  
Sherry Reeves  
Stephenie Clark  
Joe Maimone

#### Date of Review:



## NORTH CAROLINA CHARTER SCHOOL APPLICATION

# TeamCFA: Pender

**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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VII. \_\_\_\_\_

AGREEMENT PAGE

<u>Application Fee:</u>	<u>80</u>
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**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: TeamCFA: Pender

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 X

Name of non-profit organization under which charter will be organized or operated: *TeamCFA: Pender*

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: *Marcus Benson*

Title/Relationship to to nonprofitMunicipality: *Board Chair*

*Mailing address:* PO Box 3305  
Wilmington NC 28406  
*Primary telephone:* 910-617-5557 *Alternative telephone:* 812-599-6530  
*E-Mail address:* mtb.web@hotmail.com

*Name of county and local education agency (LEA) in which charter school will reside:*  
County: PENDER  
LEA: 710-Pender 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. *Leaders Building Leaders*  
List the fee provided to the third party person or group. **No direct fees**

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.

This application was supported in partnership by multiple organizations. The team of Leaders Building Leaders (LBL) wrote the application based on the identified tenets and characteristics of the most effective TeamCFA schools. The school's education plan is based on the TeamCFA model; the school's governance plan is based on the model designed for TeamCFA schools and through multiple meetings with the founding board members. LBL and TeamCFA facilitated with the founding board to ensure the application met the unique needs of the TeamCFA: Pender board and community. The school's operations plan was written in collaboration with the founding board chair and application team. To finalize the financial plan, the expertise through the TeamCFA's finance team were utilized to develop the budget and create the oversight procedures.

*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:

*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? TeamCFA: Pender

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

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

Projected School Opening: Year 2020 Month August

Will this school operate on a year round schedule?

No:  X

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	450
Year 2	K,01,02,03,04,05,06,07	650
Year 3	K,01,02,03,04,05,06,07,08	750
Year 4	K,01,02,03,04,05,06,07,08	850
Year 5	K,01,02,03,04,05,06,07,08	900

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.

katy ridnouer  
Signature

Consultant  
Title

katy ridnouer  
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>Were any surveys/local perspective parent meeting held? What is the rationale, other than the enrollment of another school, to justify the scope and size of the school and its growth?</u>	Austin Smigel	<u>Grade Levels</u>
<u>Applicant needs to clarify: What evidence is there to support interest among the community? 900 students is a lot at the end of year 5.</u>	Kristen Parker	<u>Grade Levels</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Jonathan Bryant</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Jessica Kelly</u>	<u>Pass</u>
<u>Danielle Allen</u>	<u>Pass</u>
<u>Bruce Friend</u>	
<u>Austin Smigel</u>	<u>Pass</u>
<u>Alex Quigley</u>	
<u>Jonathan Bryant</u>	
<u>Lindalyn Kakadelis</u>	
<u>Kristen Parker</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Robert McQuat</u>	
<u>Sherry Reeves</u>	
<u>Stephenie Clark</u>	
<u>Joe Maimone</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:*

With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

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

TeamCFA: Pender believes that a strong nation lies in the strength of the education instilled in its children. Through a rigorous academic program with the Core Knowledge Sequence and a values-based character education program with Core Virtues, TeamCFA: Pender will care for the hearts and minds of students, providing them with the content knowledge, sense of civic duty, and personal pride to become the leaders our great nation will require to ensure our standing as a world leader.

### **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.*

TeamCFA: Pender will seek an enrollment of a student body that closely mirrors that of Pender County. TeamCFA: Pender expects to attract interest from parents throughout Pender County who believe their children will be nurtured to reach their maximum intellectual and personal potential in TeamCFA: Pender's rigorous academic environment in a small setting with a strong character development program. We will encourage all scholars to apply regardless of race, parent's income, or address. The location was selected in Western Pender County because of the proximity to I-40 and the fact that Pender County does not have a charter school. The board wanted to provide parents with educational freedom by providing them with a high quality school choice option. The school's location will allow it to draw students from Pender and New Hanover counties.

- 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).*

TeamCFA : Pender expects to enroll 450 scholars in the 2020-2021 school

year. We will market to families in both Pender County and in New Hanover County to achieve an enrollment in which 70% of students will be drawn from Pender County and 30% will be drawn from New Hanover County. This is due to the location of the facility off of Interstate 40 and the proximity to Coastal Preparatory Academy: CFA that in year 2 has 630 scholars with a long waitlist. An enrollment of 315 scholars from Pender County represents approximately 6.3% of approximately 5,000 students, which is the average daily membership for grades K-6 in Pender County Schools (based on the first-month 2017-18 ADM reported to DPI). An enrollment of 135 scholars from New Hanover County represents approximately .71% of approximately 15,000 students, which is the average daily membership for grades K-6 in New Hanover County (based on first-month 2017-18 ADM reported to DPI).

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

TeamCFA: Pender is the first public charter school in Pender County. The education plan includes using the Core Knowledge Sequence, Core Knowledge Language Arts, Singapore Math and Core Virtues. TeamCFA has 14 network schools that utilize this curriculum in North Carolina. There are no schools in Pender County that use this curriculum. It will provide parents with a high quality school choice with a unique curriculum. Based on the long waitlist at Coastal Preparatory Academy: CFA in Wilmington and many students from Pender County enrolled in that school, we know that parents are eager for another school choice for their children.

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.*

1. Professional Opportunities: Teachers at TeamCFA: Pender will be responsible for guiding students to levels of meaningful achievement by

establishing higher standards through collaboration with not only their peers in Pender County but also their peer partners across the TeamCFA network. The academic plan of TeamCFA : Pender challenges teachers to develop their skills as facilitators of learning and devote their efforts to creatively plan how to individualize instruction and best teach the rigorous content to their students to empower their students to reach for goals beyond those traditionally set. These teacher leader opportunities will strengthen the school's overall leadership capacity and accountability towards meeting the schools overall academic vision.

3. Expanded Choices: There are not any charter schools in Pender County. As a new school choice, we will bring our rigorous Core Knowledge Sequence, integrated character development focused public school choice, and small environment option to our families.

4. Improved Student Learning: TeamCFA : Pender will improve student learning by using higher standards than the minimums called for in the North Carolina Standard Course of Study. The Core Knowledge Sequence reaches these higher, more meaningful standards through a rich base of building background knowledge that promotes increased comprehension and advanced problem solving and critical thinking skills. Student learning will also be improved through cross-curricular and collaborative teaching and learning. These combined methods will provide an atmosphere in which teachers can gain a thorough knowledge of each student's strengths and weaknesses. This will allow teachers to tailor their teaching methods and challenge students on a daily basis.

### **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.*

At TeamCFA: Pender, our goals have been adopted with a five year vision to be the highest performing public school of choice in Pender County.

#### Academics:

- By 2023, the percentage of students in grades 3 - 8 who are proficient will be at least 20 percentage points over the district average.
- According to the NC Ready Model, TeamCFA : Pender will meet or exceed academic growth annually and earn no NC Report Card grade lower than a B in each year of existence.
- Our subgroups' (ELL, EC, FRL, African American and Hispanic) academic achievement gap will decrease by 5% each year per subgroup (Overall school proficiency in an area vs. subgroup proficiency).

#### Specific Academic Objectives:

- Establish a clear prevention and intervention plan within the first 30 days of school that identifies students performing below grade level.
- Establish a successful tiered education program that provides specific strategies and content to students performing below grade level (month 6).
- Have an annual curriculum and instruction audit performed by the Core

Knowledge experts to enhance teacher delivery and development.

-By year five, over half of TeamCFA: Pender's middle school students will be enrolled in advanced courses of study.

Enrollment:

With the awareness that on average new charter schools enroll 76% of projected students, we establish the following enrollment goals:

-Based on the first five year ADM projection, the school will meet annual enrollment goals. Our goal is to secure 1,000 applications for enrollment to achieve our Year 1 goal of serving 450 scholars.

-Our annual student attrition rate will decrease annually with a goal of being less than 10% in year one and two.

Parent Satisfaction:

-According to survey data, our parent and family satisfaction score will remain above 95%. Finances:

-TeamCFA: Pender will build a cash surplus of \$500,000 by June 2025.

Governance: The TeamCFA: Pender board will participate in eight hours of professional development annually and participate in all NCDPI Ready-to-Open training sessions. TeamCFA: Pender will also participate in professional development opportunities provided by the OCS and the NC Assoc. of Public Charter Schools.

Communication: TeamCFA : Pender's goals will be communicated to the board of directors each month by the Head of School and/or appointed standing committees. The board will adopt a strategic outcomes-based calendar that will allow the board to provide substantial oversight to the school. All organization goals adopted by the board will have specific deliverables (adopted into policy) that will inform the board of the school's progress towards attaining its mission, vision, and goals. These monthly reports will be available electronically to the general public. In addition to monthly board reports, an annual report will be provided to families, stakeholders, and community partners disseminating the state of the TeamCFA: Pender.

Parents will be informed in regardsto our progress monitoring, student progression, and reporting processes that include progress reports (minimum quarterly) that are instructional skills specific and parent friendly.

Test results will be published with parents, board members, and stakeholders as they become available. Formative NWEA MAP assessments will be shared with the board three times a year, at the close of each testing period. The data concerning EOGs and EOCs will be communicated to the governing board, parents, and other stakeholders on a yearly basis. Further, a "State of the School" will be published each fall, in which the lead administrator and the governing board will share with parents and other community stakeholders where the school is in terms of achievement and strategic planning. This document will provide those concerned with knowledge of where the school has been and a vision for where the school is headed.

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

The TeamCFA: Pender board is building a strong foundation. Upon approval, the TeamCFA: Pender board will be actively involved in the Ready to Open

Process with OCS. The governing board of TeamCFA: Pender will be integrally involved in assessing how the program is meeting the school's mission. As part of the planning year process, the board will work with the lead administrator, and in collaboration with the school's CMO (i.e. TeamCFA) to ensure the school's alignment towards achieving the adopted goals. This process will entail the development of an outcomes-based board calendar and strategic plan for approval by the Board that provides specific action to the achievement of each performance goal. The board will receive ongoing resources, recommendations, support, and training from the Office of Charter Schools, TeamCFA, and other governance experts made available to the organization.

To provide effective oversight, the board will appoint committees that measure and analyze the desired outcomes of the school around Academics, Finances, Operations, Development and Governance. Committee members may consist of board members, parents, community members, field experts, and teachers. Each committee will have specific roles and responsibilities which includes the analysis of the deliverable data from the operational oversight and program evaluations. The school's goals (previous section) will be assigned to specific committees for oversight, data analysis, and solutions to identified issues. Evaluation data will be analyzed by committees to identify trends; flag unacceptable results; and make adjustments to the education plan, curriculum, instructional methods, and school operations as necessary.

The committees will provide specific scheduled reports (seven days in advance) to the board according to the outcomes-based board calendar. These reports, as well as strategic questions, will drive the discussion and board action to navigate the organization toward its mission. The lead administrator will be responsible for developing plans of action and solutions. Some actions may require board approval (i.e. curriculum, staffing, academic calendars).

Mission success will also be gauged by demand within the community for spaces in the school and the it's overall organizational health. The Head of School will keep the board apprised on a continuous basis of the number of scholars enrolled and the number of scholars on the waiting list. Scholars, parents, and community members will be encouraged to share observations with the Head of School, both formally during a yearly survey process, and informally, as concerns and suggestions arise. The Head of School will report the results of this survey at the first regularly scheduled board meeting after the close of the survey. Other suggestions and concerns will be communicated as the need arises. As a board, we will analyze data annually to determine the organizational health through the Teacher Working Conditions Survey, teacher turnover, and partnership feedback.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Mission statement needs clarification. What "American values" is the mission statement referencing?	Danielle Allen	Mission Stat
What is the school's definition on "American Values?" Is there evidence that these values benefit students?	Jonathan Bryant	Mission Stat
Please clarify American Values in mission statement.	Jessica Kelly	Mission Stat
Applicant needs to clarify: What is meant by "American Values?"	Kristen Parker	Mission Stat
It appears that justification is based largely on Coastal Preparatory Academy's success in enrolling students. What are their academic outcomes?	Austin Smigel	Educational
Applicant needs to clarify: Aside from the curriculum, how will the school differ from the current LEA?	Kristen Parker	Educational
Applicant needs to clarify: Aside from there not being any charter schools, what other rationale and data is there to support a need for a charter school?		
Applicant needs to clarify: The application names a specific area- but who are the targeted students you are hoping to enroll in the school?		
Is there not being another charter school the main reason for opening this school? Please clarify.	Jessica Kelly	Educational
Approximately 52% of students in Pender County Schools and 56% of students in New Hanover County Schools are FRPL eligible. More than half receive Title I services. Has the board considered this in their assertion that they will "seek an enrollment of a student body that closely mirrors that of Pender County"?	Danielle Allen	Educational
Of the 16 public schools in Pender County, 14 have grades of A, B, or C. Only 1 school received a D, and one school received an F. The application says nothing about targeting students in these lower performing schools, so what is truly the board's rationale for a charter school in Pender County, aside from the fact that they don't currently have one?		
Does applicant have survey data indicating parent interest? Or are they solely relying on waitlist information?		
Coastal Prep: CFA had a growth index of -11 points last year. What evidence does the board have that the CFA model will be successful with their targeted student population?		
How many students are in Pender Co - 500? Was there any survey offered to prospective families? Need appears to be based on wait list data from other schools - which can be insufficient rationale. Is the only difference between Pender TeamCFA and the local schools curricular?	Jonathan Bryant	Educational
What room will teachers have within the CFA educational model (Core Knowledge, CKLA, Singapore Math, etc.) to be responsible for the learning program at the school site? If it's the ability to individualize instruction, how is that a "new professional opportunity"?	Danielle Allen	Purposes of
Mission explicitly states a commitment to "American values." Where is that evidenced in these proposed purposes?		
Students in Pender County are generally performing well (of the 16 schools, 14 have grades of C or above). What evidence does CFA/the board have that their educational program will bring even greater gains for the students of Pender County, especially given that the nearest CFA school (Coastal Prep) is low-performing?		
Where do "American Values" tie in to these purposes?	Jonathan Bryant	Purposes of

<p>Please clarify how these are new professional opportunities.</p> <p>Please clarify what data will be used to ensure improved student learning is taking place.</p>	<p>Jessica Kelly</p>	<p>Purposes of</p>
<p>What are the academic outcomes of Coastal Preparatory Academy who has been used as an example of this school's proposed success? Is it reasonable to assume that no school grade level below a "B" is achievable when Pender County Schools range in school grades from D to A with an overall county performance of 87.5% as C or D schools?</p>	<p>Austin Smigel</p>	<p>Goals for th</p>
<p>Applicant needs to clarify: How realistic is it to say that the NC report card will be no lower than a B? How can this comparison be made without knowing where students are at the start?</p> <p>Applicant needs to clarify: How will the school assess alignment/goals of reaching "American Values" as outlined in the mission statement?</p>	<p>Kristen Parker</p>	<p>Goals for th</p>
<p>"A five year vision to be the highest performing public school of choice in Pender Co" is not particularly lofty, especially since the applicant states that there are not any current schools of choice in Pender Co.</p> <p>Do not see any tie in to "American Values" with regard to goals. How will this be measured?</p> <p>will Pender TeamCFA establish initial baselines for student achievement, or simply tie achievement to the numbers in this section without first knowing the student body?</p>	<p>Jonathan Bryant</p>	<p>Goals for th</p>
<p>Is the goal of earning a B each year ambitious, given that half of the schools in Pender County have an A or B (and the board has not stated that they are targeting students in the two lower performing schools in the county)? Will this model truly improve student outcomes (especially given the success of the model at Coastal Prep)?</p> <p>Section does not in any way address how the board will know that the school is helping to instill American values, although this was a core part of the mission statement.</p>	<p>Danielle Allen</p>	<p>Goals for th</p>
<p>Please clarify NC Report Card...it states that the school will never get a grade lower than a B. Does this include in year one without knowledge of where students are? Was there additional research conducted to reach this goal?</p>	<p>Jessica Kelly</p>	<p>Goals for th</p>

Reviewer	Score
Jonathan Bryant	Fail
Joe Maimone	
Jessica Kelly	Pass
Danielle Allen	Fail
Bruce Friend	
Austin Smigel	Pass
Alex Quigley	
Jonathan Bryant	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Robert McOuat	
Phyllis Gibbs	
Kristen Parker	Fail
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.

TeamCFA: Pender is founded on the belief that the Core Knowledge Sequence, which we will utilize in full, will create a rigorous and exciting learning atmosphere that will produce effective communicators, lifelong problem solvers, and engaged and informed American citizens. Through the delivery of a classical curriculum through the Core Knowledge Sequence for reading, science, and social studies instruction and Singapore Math for math instruction, we will nurture well-rounded, highly educated, successful scholars. This curriculum is both deep and wide in its approach to learning, calls for cross-curricular teaching and builds on prior knowledge, encouraging teachers to disseminate the content through instructional methods that meet the developmental needs of their scholars.

TeamCFA : Pender will use a strong character education program, Core Virtues, to raise the level of student performance in all academic areas. A rigorous cross-curricular approach is the only path to academic success. TeamCFA : Pender believes that research and implementation with fidelity demonstrates that Core Knowledge, Core Knowledge Language Arts (CKLA), Singapore Math, and Core Virtues are the bedrock of education. Alongside rigorous core-subject curricula, TeamCFA : Pender will also implement daily PE and electives, including Art, Music, and foreign language on a rotating basis to ensure that our students have the opportunity to learn about and immerse themselves in other world perspectives, showing them options and interpretations, thereby freeing them to create their own interpretations and ideas about the world. To develop scholars who not only have a wealth of knowledge and a depth of skills but also have the ability to adapt and apply what they know is the measure of a successful school because these students will not only achieve academically, but they will also achieve socio-emotionally because of their appreciation for other peoples perspectives and theirs is just as valuable as others. In this way, they'll feel welcome at the proverbial community table and have ideas, solutions, and action to contribute. Providing scholars with an education based on problem-solving and the accumulation of content knowledge will prepare them well for the employment opportunities that will be available in and beyond their community. Core Knowledge provides all scholars with the background knowledge regardless of gaps in that knowledge. The curriculum is designed to work regardless of economic or educational background.

McKinsey's 2017 report estimates that fully 50% of current work activities have the potential to be automated by technologies by the year 2030. As a

result 400-800 million people could be displaced from their current employment in the next 12 years. The workforce will need to be retrained. We must rethink the education we provide our citizens, starting in elementary school. We simply cannot train them in the same manner that we have historically trained scholars because we would be training them for careers that no longer exist. Instead of training scholars for careers involving routine skills and subject-specific knowledge, we need to ensure that they are ready for specialized training for the new economy that will require workers who have a generalized education and can be trained quickly as tasks change in a highly automated labor market. Flexible and relational thinking and the ability to grow and adapt will be key to success in the automated world.

### **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.*

TeamCFA : Pender's goal is to create a learning environment with a maximum adult to scholar ratio average of 25:1. In our K-2 classrooms, the ratio will be lower because of the use of assistants and other support personnel based on the unique needs of our children. This will give teachers an opportunity to spend more time learning the strengths and weaknesses of each scholar, improving teacher effectiveness in designing class-based instruction and independent study projects. Our goal is to recruit the best connectors and content educators for each teaching position. In keeping with the philosophy of the school, all classrooms will be equipped with manipulatives and materials appropriate to the lesson being taught. Teachers within grade levels will collaborate on lesson preparation and classroom set-up. Classrooms will be arranged so that scholars feel a sense of order and purpose; displays will be presented in a such a way as to complement, instruction being given; materials will be ready at hand for scholar exploration and manipulation as called for by the lessons planned for the day. Teacher professional development will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. This development plan calls for a three-year, in-depth professional development series that will take teachers from an understanding of the tenets of the Core Knowledge Sequence to being true collaborators and creators of content-rich units. Teachers will also learn to act as facilitators of learning, guiding scholars to discover truths through kinesthetic, audio, and visual learning. In assembling the initial teaching staff, and in making subsequent hiring decisions, TeamCFA: Pender will seek out teachers who are comfortable in the role of facilitator, who collaborate well with peers, and who have the intellectual, social, and emotional capacity to engage scholars as individuals.

With the integration of social studies, science, music, and the arts in CKLA, students will learn concepts within the structures of a variety of structures. Students build knowledge most effectively when the selection of read-aloud texts does not shift randomly from topic to topic from one class to the next but instead remains focused on a single domain over a sustained period of time. (A domain is an area of knowledge, such as the human body,

plants, astronomy, Eastern Woodlands Native Americans, civil rights, and so on.) Staying focused on a single topic or domain before moving to another increases the chance that students will receive multiple exposures to key vocabulary words and concepts. For example, for kindergartners, the Sequence specifies a series of topics in the domain of Plants and Plant Growth. In a two-week unit of study on the specified topics, students will get multiple exposures to key vocabulary words (such as seeds, roots, crops, and harvest). Hearing these kinds of words used repeatedly in meaningful contexts over the course of a domain increases children's learning of new knowledge.

Horizon Research Inc's "Report of the 2012 National Survey of Science and Mathematics Education" in February 2013 showed that K-6 teachers spend an average of only 16-21 minutes a day on social studies and only 19-24 minutes on science. Given a lack of experience and exposure, middle and high school students would find it challenging to engage in meaningful studies and discourse about history, geography, and civics. From "legislature" to "separation of powers," there are thousands of terms that literate American adults are presumed to know. Preparing them through the acquisition of academic knowledge leads to an increase in reading comprehension, critical thinking, problem solving, creativity, and even curiosity. These are essential skills our students will need to be successful in the new marketplace.

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.*

The Core Knowledge Sequence is a "coherent, cumulative, and content-specific core curriculum" developed by the Core Knowledge Foundation, a nonprofit organization founded by E. D. Hirsch, Ph.D. professor emeritus of education and humanities at the University of Virginia. Dr. Hirsch is the author of Cultural Literacy (Vintage, 1988), The Schools We Need and Why We Don't Have Them (Anchor, 1999), The Knowledge Deficit (Houghton Mifflin Harcourt, 2006), The Making of Americans: Democracy and Our Schools (Yale University Press, 2009), and, most recently, Why Knowledge Matters: Rescuing Our Children from Failed Educational Theories (Harvard Education Press, 2016). In alignment with our mission, the innovative and rigorously academic nature of the Core Knowledge Sequence will result in improved scholar learning and achievement results. In studies (and in North Carolina charter schools), the Sequence has consistently produced scholars who score better on tests, are better prepared to address a broad range of topics, and are excited about learning. It has also been shown to create an environment of collaboration and collegiality among teachers. This excitement is infectious and helps to produce scholars who become lifelong learners and voracious problem solvers.

In keeping with the standards set forth by the Core Knowledge Foundation, we have specifically chosen to use Singapore Math for our mathematics instruction. The program offered with this rigorous curriculum is based on the model of teaching mathematics in Singapore, where scholars consistently outscore and outperform their United States counterparts. Further, there is a great deal of emphasis on problem solving and the solving of multi-step problems. A scholar who has been trained using this method will be better prepared to look at and solve problems from many different angles. These curricula align directly with the North Carolina Essential Standards.

In order to succeed at TeamCFA: Pender, scholars will have to be leaders in the classroom and strive for academic achievement through hard work and collaboration with peers. All scholars deserve a fair, equal and all-encompassing curriculum, and the Core Knowledge Sequence has been shown to be effective for all scholars. In fact, it levels the playing field for scholars of all backgrounds, including low-wealth and at-risk scholars. It has been shown that at-risk and lower academic achieving scholars generally have lower standards and expectations set for them. The Core Knowledge Sequence does not change its standards based on socioeconomic or academic backgrounds. It holds every scholar to the highest standards and expectations. This curriculum, in conjunction with its higher standards, will create scholars who are able to achieve more and who are better prepared to compete and succeed in a global society.

Further, we will weave the character development programs throughout the curriculum, using the Core Virtues developed by Mary Beth Klee, which focuses on the sixteen habits that create resilient lifelong learners who can communicate effectively and work collaboratively through the study of these areas: persistence, finding humor, developing empathy, thinking flexibly, and communicating with clarity and precision. The lessons will be integrated into the curriculum and will result in a student body with a shared vocabulary, common goals, and the tools to succeed in all aspects of life.

For parents, the author of Core Knowledge, E.D. Hirsch, has also developed a book series to support their child's development based on their grade level. Beginning in Kindergarten, parents can read *What your \_\_\_\_\_ Grader Needs to Know* to guide at-home instruction in both academic and socio-emotional lessons.

- 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.*

The first strategy teachers will be expected to master is the ability to utilize the clear outline of content to be learned year by year. Although the Core Knowledge Sequence is not specifically a strategy itself, without this mastery of the Sequence it will be challenging for the knowledge, language, and skills to build cumulatively from year to year. The strategy of sequential building of knowledge not only helps ensure that children enter each new grade ready to learn, it also helps prevent the repetitions and gaps that so often characterize current education. Integrating technology into the classroom will empower scholars to stay connected and receive quick feedback. Teachers will develop technology-rich lessons to keep scholars motivated and engaged. Some examples of utilizing technology

in the classroom (primary strategy) would be to create web-based lessons, flipped classrooms, virtual field trips, research, animation, or develop some type of graphic. A supplemental strategy would be utilizing specific programs such as Edgenuity to reinforce and assess learning. These technology integration strategies will have a positive impact on scholars' learning because digital content will be used for intervention, acceleration, and gap filling.

Through direct instruction and lecture, teachers are expected to teach in a manner that incites wonderment and inspires their scholars to learn more. To that end, we expect cross-curricular teaching with hands-on, real-life applications. This will create lifelong learners who are able to apply what they learn to everyday situations. Teachers will team with assistants to increase opportunities for differentiation.

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.*

Annually, as adopted in TeamCFA: Pender policy, the school's requirements for promotion will be evaluated by each grade level and the head of school to create a culture of rigor high achievement opportunities for all. These requirements will be communicated to parents and scholars throughout the academic year.

As previously explained, because of the Sequence's intentional development towards scholar mastery, the sequential building of knowledge will provide a clear path for all teachers to assess and analyze any potential gaps that so often characterize current education. TeamCFA: Pender will utilize nationally normed, standards-based formative assessments from NWEA at least three times per year. The data derived from these assessments will be used to guide conversations with children and families regarding the scholar's strengths, opportunities and specific concepts needed to master for promotion. Our instructional program is designed to ensure children of all different learning capacities are accommodated.

The primary purpose of the proposed school is to increase learning opportunities for all scholars. The educational program, instructional plan, and promotion requirements are specifically designed to successfully transition each scholar to the next grade. The comprehensive curriculum plan will not only prepare scholars academically through the use of a rigorous and relevant curriculum, but will also ensure that scholars have appropriate personal/social skills.

Teacher professional development will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. This development plan calls for a three-year, in-depth professional development series that will take teachers from an understanding of the tenets of the Core Knowledge Sequence to being true collaborators and creators of content-rich units. Teachers will also learn to act as facilitators of learning, guiding scholars to discover truths through kinesthetic, auditory, and visual learning.

To assist teachers with continual improvement of their instructional practices, TeamCFA: Pender will hire an instructional coach who will provide

teachers with the necessary training and coaching in Core Knowledge, Core Knowledge Language Arts, Singapore Math, as well as variety of instructional delivery methods. The coach will also work side-by-side with the teachers to model lessons, increase content and skill retention, increase rigor, and develop a learning environment conducive to growth throughout the school year. We will also offer summer learning opportunities. This will include Read to Achieve programming for our 3rd graders who are not proficient readers.

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

The calendar that TeamCFA : Pender has assembled consists of 179 school days, with 1,241 instructional hours. Our eight hour school day will allow for at least seven instructional hours per day. We believe that these extra instructional hours will lend to the more rigorous environment that we plan to create. There are a number of work days set aside for various purposes, including professional development and grade preparation and reporting. TeamCFA will provide professional development and instructional coaching around Core Knowledge, Singapore Math, NWEA MAP Assessment and digital content, such as Edgenuity. TeamCFA Instructional Support Staff will conduct professional development days during pre-service days and during assigned professional development days throughout the school year. They will help the faculty and staff create a plan for the year that will give them an overview of what they will be teaching and will help them gain an understanding of how to begin teaching in a collaborative and cross-curricular manner. As the year progresses, the teachers are allotted an adequate amount of time to plan together, grow together, and thoughtfully provide feedback to parents on their children's progress. More often than not, teachers start the year with high expectations and a treasure trove of new ideas. Commonly, once the year progresses, their treasure trove gets buried beneath mid-term progress reports, disciplinary referrals, student essays to grade, and any number of other great ideas that they want to incorporate. By allowing teachers the time to digest these new ideas and share them with one another, they will be more effective in the classroom and feel empowered to make decisions that will produce excellent academic results in their scholars.

In addition, scholars will benefit from small, planned breaks in their yearly schedule. We have examined the calendar and identified those times when learning seems to be at a low point for scholars, whether this is due to general fatigue or holiday excitement. Upon determining that, we have tried to allow for work days or holidays at those times when scholars are most distracted. This allows the time that they are in school to be truly devoted to learning and growing, both academically and socially.

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

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

*progress and academic student growth.*

Every teacher, staff, and administrative member is dedicated to the success of every TeamCFA: Pender scholar. We believe that all scholars are "at-risk" of falling behind academically and socially. TeamCFA: Pender leadership will use all available resources and tools to ensure that each child receives a strong foundation for their future. We believe every child shall have the opportunity to be successful, in every class, every day.

TeamCFA: Pender will implement a progress monitoring intervention system for all scholars utilizing research based programs focused on indicating academic deficiencies. Along with the expertise of teachers and other personnel for early identification of scholars who are "at-risk", the primary prevention level includes high quality instructional practices and implementation of the Sequence with fidelity. The middle level includes evidence-based intervention(s) of moderate intensity using skills-based instructional tools. Through collaborative efforts, multiple tiers of increasingly intense instruction/intervention services will be implemented to support scholar academic proficiency. Scholars needing remediation or intensive instructional support will be matched to strategic and intensive instruction/interventions based on screening, progress monitoring, and diagnostic assessments.

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.*

When parents acknowledge that English is an additional language in the home, or when they check "Yes" to any of the determining questions on the Home Language Survey, then the scholar is referred to the ELL liaison for testing. If the scholar has not been previously identified as ELL, the WIDA Access Placement Test (W-APT) will be administered. If the scholar's academic records show previous ELL identification, the faculty will proceed with preparing adequate instructional plan based on proficiency level. Our faculty will determine the appropriate means of instruction and modifications or accommodations for ELLs based on previous academic records, ELL placement test, parent input, scholar input, scholar observations, and other relevant data. We will ensure that ELL scholars meet the same challenging English proficiency objectives and standards required of all other scholars. Teachers will individualize their lesson plans for the ELL scholars, and they will also align their strategies with the available Core Knowledge ELL lesson plans. The school will employ the necessary faculty and staff to ensure appropriate curricular materials and supplemental resources needed to help ELL learners become proficient in English are present in the classroom.

Our curriculum will be supplemented with Web-based programs with a multitude of multimedia activities including monolingual/bilingual dictionary, grammar tools, audio support, and supplementary print coursework. Research suggests that ELL learners benefit greatly from Total Physical Response, in which scholars physically engage in their learning. For instance, if they are

reading a story about the wind blowing, the teacher and scholars will pretend to be the wind as they read. We will incorporate those strategies for working with ELL students

Strategies and proposed services for ensuring the high achievement of English Language Learners include providing students with instruction that will enable them to increase academic achievement and use English language skills to meet district and state learning standards; providing instruction so that students acquire social and academic English language proficiency; and training educators on the four-hour ELL model, so students who are not proficient in English receive proper instruction based on their level and need. This English language immersion program consists of instruction through speaking, reading, writing, grammar, and vocabulary lessons. The four hours of instruction are achieved through placement of students with other English language learning students, or within a Mainstream Classroom in which students instructional program is outlined in an ILLP (Individual Language Learning Plan). To ensure compliance with state and federal guidelines for ELL scholars, TeamCFA: Pender staff will work closely with classroom teachers to facilitate communication and dissemination of information to parents. Communications will be sent, to the extent possible, in a language understood by the parents. Scholars who are determined to be fully English proficient will continue to be monitored for a period of two years, as required by state regulations. Parents will be notified and continued to be informed of monitoring progress. To ensure that educators are implementing the ELL strategies and procedures properly, the instructional coach and Head of School will incorporate these elements into walk-through/informal observations as well as formal observations; furthermore, the subsequent debriefs will involve discussion around these strategies.

English Language Learners will be able to fully participate in experiencing the Core Knowledge curriculum and all of its engaging content. Using the Assessment and Remediation guide provided in the Core Knowledge Language Arts program, teachers will give ELL scholars the same content framed appropriately for their language level.

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.*

TeamCFA: Pender recognizes the importance of meeting the range of different learning needs for intellectually gifted students. In grades Kindergarten through grade 5, the classroom teachers will be responsible for expediting learning using the North Carolina State Standards while, at the same time, reaching gifted students needs. Fortunately, the Core Knowledge Sequence is structured in such a way that scholars at all levels have access to the content and are constantly challenged to learn new things. However, we acknowledge that additional experiences are sometimes necessary to ensure all scholars are met at their instructional level and attain growth. High-performing scholars will be able to experience content at their instructional level through the use of individualization and

differentiation. Lessons will be differentiated based on scholars' need and implemented accordingly.

While all students will be taught with the same curricula, gifted students will be expected to not only create and evaluate ideas for the subject/content for which they are responsible to master, they will also analyze developed ideas and then synthesize the information in ways that improve those ideas, leading to the creation of new ideas. In Kindergarten, TeamCFA: Pender will collect data from each student through the Wechsler-Intelligence Scale for Children-III (WISC-III). Also in Kindergarten and then through grade two, students will be assessed for qualifying gifted abilities, and those students displaying above grade-level skills will be challenged beyond grade level expectations. At the beginning of third grade students will be evaluated to determine their ability as academically/intellectually gifted students. Students will need to meet one of the following pathways:

- Pathway 1: Score in the 98th percentile for age range on the WISC-III.
- Pathway 2: Meet three of the following four criteria areas.
- Area A: Score in the 93rd percentile for age range on the WISC-III.
- Area B: Score in the 90th percentile for age range on the WISC-III in math content or reading content.
- Area C: Score in the 85th percentile for age on the Woodcock Johnson assessment in Math or Reading
- Area D: Reading and math classroom grade averages are A's and a teacher gives a recommendation letter describing classroom evidence that shows signs of Intellectual Giftedness.

Each year, the parents will receive notification of the services their scholar qualify for and will receive. Each child who is Intellectually Gifted will be placed on a Personalized Education Plan (PEP). The plan will show academic goals and a time frame to meet the goals. When the PEP is created, the scholar and parent will develop the goals with the assistance of the teacher to guide the goal, so it is realistic and corresponds to the North Carolina Standard Course of Study.

### **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)*

To identify scholars who have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act, upon enrollment at the charter school, all scholars' records will be reviewed by EC staff and classroom teachers for previously diagnosed disabilities, eligibility under Section 504 and/or Individual Education Plans. The IEP team will contact the previous school in writing and by telephone to request the current IEP and pertinent scholar information. We will speak and/or meet with the previous special education staff regarding special accommodations and follow through with previously written plans until we are able to conduct our own evaluation, adopt the most current IEP or develop a new IEP. Teachers, parents and staff will be provided with resources for identifying children with special needs. Our school will provide brochures, posters, and letters found on the Public Schools of North Carolina Department of Public Instruction Project Child Find website. Under the leadership of an Exceptional Children's Teacher, the education team, consisting of an LEA representative, the parent of a child with a disability, regular education teacher of the child, and an individual who can interpret the instructional implications of evaluation, will use a problem-solving approach and progress monitoring when addressing academic, behavioral, and/or developmental concerns regarding scholars. Team members will document the data collected, monitor the results of scientifically research-based interventions and make data-based decisions. The school will utilize the North Carolina Department of Public Instruction forms to document the evaluation and IEP.

Additionally, parents can refer their child for testing at any time by providing a written request to the school. In compliance with confidentiality requirements, all confidential records shall be kept in a locked file cabinet in a room accessible only to pertinent school personnel. Written documentation will be required to remove any records from the records room. Only those staff members of the scholars will have access to the aforementioned files. Our school will provide special education and related services according to the federal mandates of the Individuals with Disabilities Education Act and the regulations of the North Carolina Public School Law, Article 9. To ensure record compliance, our school will develop and implement a record compliance monitoring system. The IEP team will complete a compliance checklist for all records of scholars with disabilities. Each record will be reviewed, and if any noncompliance is found, a correction action of noncompliance will take place immediately. Verification of correction will be the final action to ensure the noncompliance was corrected. The 504 Coordinator at our school will monitor the 504 Accommodation plans compliance as required by Section 504 of the Rehabilitation Act of 1973. We will have EC staff and will contract with outside service providers for psychological testing and services, speech, occupational therapy, and physical therapy.

### 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.*

TeamCFA: Pender will provide educational opportunities to scholars with disabilities in the least restrictive environment with the full continuum of alternative placements, as appropriate. We anticipate that at least 10% of our school population will require EC services and will plan accordingly. There will be an Exceptional Children's Director and at least one EC teacher on staff, depending on enrollment. They will be responsible for implementing IEPs and monitoring scholars' progress. The school will contract with Occupational Therapists, Physical Therapists, Speech Therapists, and psychologists in Gastonia and surrounding areas who can provide testing, reporting, and therapeutic services. Classrooms will be equipped with the necessary materials to ensure access to the curriculum. Quarterly, the EC teacher will meet with scholars' classroom teacher(s) to discuss progress and determine if a parental meeting is necessary. Yearly, parents, the EC teacher, one regular education teacher, a school administrator and an individual who can interpret any evaluation data will meet to review the scholar's IEP and to make any necessary changes or recommendations. Parents may request an IEP meeting at any time. We will ensure that all scholars with disabilities have access to a free and appropriate public education. We will focus on their special education and related services needed in order to ensure that they acquire the best possible education and are being prepared for further education, employment and independent living. We will follow all federal and state laws and regulations relating to the education of scholars with disabilities.

All staff will be educated as to the contents and implications of these laws. Scholars will be granted due process rights, including the opportunity for a hearing before the Board, in accordance with the state law for suspensions and expulsions. While it may be necessary for scholars with disabilities to be suspended or expelled, before those scholars can be suspended for more than 10 school days in a given school year, a manifestation determination meeting will be held by the IEP team to decide if the scholar's disability caused the misbehavior. The outcome may impact any further disciplinary action taken related to the scholar, as to ensure the scholar will not be denied FAPE per federal law.

The Exceptional Children's teacher will be responsible for monitoring the implementation of all IEPs. Scholars will receive quarterly progress reports and an annual review meeting. Further meetings will be scheduled as a scholar's needs change. As a scholar is identified, a transition meeting will take place to ensure that all accommodations are communicated to the relevant teachers.

To ensure a robust program, we will partner with local churches for backpack and other student- and family-support programs, build a vibrant parent support organization, and partner with the local Sheriff, police, and fire departments to initiate educational courses and services. We would introduce an Officer Friendly Program to help children develop a healthy view of

police officers and forge friendship with police officers. We would also apply for DPI's School Resource Officer (SRO) matching grant to ensure that we have a person dedicated to school security on site.

### **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.*

TeamCFA: Pender will strive to never achieve less than a B school according to the NC Report Card. With this goal in mind, maintaining a proficiency level of 70% and meeting or exceeding academic growth annually shall be the bottom line for whole school achievement. TeamCFA: Pender will be the public school of choice and outperform the local LEA average proficiency by a minimum of 20 proficiency points. 85% percent of graduating eighth grade scholars will be proficient and prepared to enter high school in math and reading. TeamCFA: Pender will utilize the NWEA MAP tool to monitor the progress of all children. These data will provide each teacher the specific information they need to create lessons, develop small groups and address gaps in the scholar's education. Personal education plans will be developed based on results. Progress according to MAP and individualized goals will drive the bi-annual teacher/parent conferences. Scholars who are at-risk or disabled will also have individualized goals and plans that shall be met to be promoted to the next grade. There shall be no social promotion. The only exception may be if a child is previously homeschooled and the scholar's "applying" grade level for the lottery is not appropriate. In that event, the Head of School will request assessments to take place to ensure the child is placed in the most appropriate grade level entering TeamCFA: Pender.

We will train educators on how to breakdown NWEA to determine which scholars are at risk, create a rank order list to identify the bottom 15% to 25%, and pull state standards from the Learning Continuum to drive instruction. Through the use of the MTSS model, scholars will be grouped according to their level of support with a focus on the scholars who need Level 3 support. Scholars in this grouping will be supported with small group and one-on-one instruction. We will also provide training and support for the teachers and instructional coach on developing small groups within a classroom and developmental grouping amongst grade levels using NWEA data. Specifically, teachers will learn to incorporate specific visual aids, manipulatives, along with the use of modeling, call/recall, and repetition techniques.

We will ensure that educators have scheduled time to plan and will be provided with daily common planning periods as a time to collaborate,

analyze data, create assessments, and plan focused, skill-targeted instruction. Common assessments are a vital part of the planning process and are a powerful method by which to ensure that the grade level is staying true to Core Knowledge and the curriculum map. Grade-level teams will meet weekly to discuss the coming weeks objectives and skills. Decisions to promote or retain will occur through a scholar support process developed by the Head of School. Factors in promotion shall be growth according to the MAP Score, attainment of PEP goals, recommendations by staff, and scholar attendance. In third grade the team will follow Read to Achieve laws and utilize portfolio assessments to gather additional data. The Head of School will make this final decision. Promotion criteria will be communicated to parents at the start of the school year. If a scholar is in danger of being retained, that will be communicated to his/her parents or guardians at the spring conference as the fourth quarter begins. If significant evidence exists before the final school day in January the parent will be notified their child may be retained and what the plan is over the next four months to close the gap. To ensure that educators are implementing effective strategies and procedures properly, the Instructional Coach and Head of School will incorporate these elements into walk-through/informal observations as well as formal observations; furthermore, the subsequent debriefs will involve discussion around these strategies and growth data from benchmark.

### **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.*

Scholars are expected to follow all behavioral guidelines set forth in the Scholar Handbook. Our character development programs will play a role in helping scholars control their own behavior and solve problems without teacher intervention. As the Core Knowledge Sequence builds on prior knowledge, we believe this educational model allows for scholars to recognize appropriate behaviors that have been previously taught and modeled. Just as scholars will build on prior knowledge academically, they will be expected to do so socially and emotionally as well. We will implement strategies to support the social emotional needs of students, including teaching The Core Virtues program on a daily basis during Morning Circle. This will meet the students' socio-emotional needs and further develop their moral, civic, and intellectual virtues. With each student having a common understanding and shared expectations for how to work with and alongside classmates and do what's expected, so much more can be accomplished than is typical between August and June.

Our guidance counselor referral program will give teachers a clear referral path for students exhibiting struggles with behavior. The guidance counselor will use the MTSS process as it relates to behavior and offer the support that the student needs to be returned to the highest tier of functionality possible. The guidance counselor will consider environmental factors that could influence a student's decision-making process and impact his or her overall effectiveness at school. The guidance counselor and teacher will then coordinate effort to implement services and/or interventions. Teachers and support staff will be trained to evaluate students in key social-emotional learning competencies, including self-awareness, relationship skills, and responsible decision-making. This will enable teachers to identify students who are in need of services. The School Improvement Team will manage these cases and provide accountability reports to demonstrate that student progress is being monitored, evaluated, and changed as necessary according to the student services plan. A Code of Conduct contract will be provided to parents and scholars prior to the start of the school year. It outlines and defines the infractions that may lead to in-school consequences, and/or to suspension and expulsion. Depending on the severity and situation of each case, there are a range of offenses that may lead to a consequence ranging from in-school disciplinary action to long-term suspension:

- 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

Scholars will be granted due process rights, including the opportunity for a hearing before the Board, in accordance with the state law for suspensions and expulsions. While it may be necessary for scholars with disabilities to be suspended or expelled from the school, before those scholars can be suspended for more than 10 school days in a given school year, a manifestation determination meeting will be held by the IEP team to decide if the scholar's disability caused the misbehavior. The outcome may impact any further disciplinary action taken related to the scholar, as to ensure the scholar will not be denied FAPE per federal law.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
Assessment strategies?	Jonathan Bryant	Instructiona
Core Knowledge builds from year to year. Applicant proposes to open with students in grades K-6, potentially having students in 6 grade levels with no exposure to the Core Knowledge curriculum (with students in grades 3-6 having several years of exposure to a different curriculum). What interventions or supports will the school provide to help these students get acclimated?	Danielle Allen	Instructiona
How does character education raise student academic performance?		
If the school is using a three-year, in-depth PD series to teach teachers to become "true collaborators and creators of content rich units", what will happen in the first three years before teachers have that in-depth knowledge? How will they be expected to teach the CK content with fidelity?		
The instructional calendar lists 7 workdays prior to the first day of school which includes professional development and working in classrooms. Is this enough time for teachers to learn Core Knowledge, Singapore Math, and Core Virtues in depth enough? Please clarify if there will be additional professional development throughout the year.	Jessica Kelly	Instructiona
Applicant needs to clarify: What primary assessment strategies will be utilized?	Kristen Parker	Instructiona
Applicant needs to clarify: Will you be using the Core Curriculum from CoreKnowledge? Or just the sequence provided? If not using the curriculum, what expectations are there around HOW teachers create the materials? How will you ensure that the materials created are in line with the depth of the current NC standards?		
Applicant needs to clarify: According to curriculum reviews, CKLA is strong in the skill strand at many grade levels but there are opportunities to go deeper in alignment to the standards for the ELA portion- how will the school plan to identify and strengthen the curriculum in these areas?(If using the curriculum.)		
What evidence does the applicant have that Core Knowledge has been shown to be effective for "all scholars"? Can CFA provide examples of CFA schools with significant percentages of low-income students and students of color that are outperforming their LEA (both subgroup proficiency and overall)?	Danielle Allen	Curriculum a
Applicant needs to clarify: What support/what focus will there be on the Singapore Math curriculum? The narrative details the Core Knowledge Sequence but what about Singapore Math?	Kristen Parker	Curriculum a
Does the board acknowledge that some students legitimately have additional challenges that increases their risk of being underserved? How do they intend to meet the needs of these students, who will likely have very different needs from their more affluent, privileged peers? Moreover, given that many of the students enrolling at this proposed school will have no prior exposure to Core Knowledge, that may add an additional layer of interventions that are needed.	Danielle Allen	Special Prog
Will Pender TeamCFA hire an EL coordinator or will this duty fall to other staff? Who will be responsible for EL PD?	Jonathan Bryant	Special Prog
How will the school ensure the confidentiality and safekeeping of student records that are released to staff members? Where will these files be kept while they are "checked out"?	Danielle Allen	Exceptional
What are the components of the full range of service delivery placement? How will your school provide the full continuum across grade levels?	Robert McQuat	Exceptional
Why will the school contract with Gaston Co personnel? Not sure how an Officer Friendly Program and SRO grant application ties into IEP/504 needs.	Jonathan Bryant	Exceptional
Every Pender County school except one either met or exceeded growth in 2017-18. How is "meeting or exceeding growth" an ambitious goal?	Danielle Allen	Student Perf
What is the current proficiency of schools nearest the proposed location? Without this information, it's difficult to tell whether exceeding proficiency by 20 points is reasonable, feasible, or ambitious.		

Will the "at risk" determination rely solely on NWEA performance? Following the logic in the previous section that all students are at-risk of falling behind academically, will all students be given individualized goals/promotion plans?		
What types of evidence will be used to determine a scholar's likelihood of being retained?		
Please clarify if MAP will be the only tool used throughout the year to determine at risk students.	Jessica Kelly	Student Perf
Who will administer discipline (who will assign suspension, for instance) at Pender TeamCFA?	Jonathan Bryant	Student Cond

Reviewer	Score
Alex Quigley	
Tammi Sutton	
Bruce Friend	
Danielle Allen	Pass
Jessica Kelly	Pass
Joe Maimone	
Jonathan Bryant	Pass
Stephenie Clark	
Sherry Reeves	
Robert McOuat	
Phyllis Gibbs	
Kristen Parker	Pass
Lindalyn Kakadelis	
Jonathan Bryant	
Austin Smigel	Pass

#### **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:* TeamCFA: Pender

*Mailing Address:* 122 Cinema Drive

*City/State/Zip:* Wilmington NC 28403

*Street Address:* 122 Cinema Drive

*Phone:* 812-599-6530

*Fax:* 999-999-9999

*Name of registered agent and address:* Anthony Helton

152 East Main Street

Forrest City, NC 28043

##### ***FEDERAL TAX ID:***

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

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

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

X No

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

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

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

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.

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?
Marcus Benson	Board Chair	NEW HANOVER			
Brenda Tucker	Board Vice Chair	PENDER	Retired		
Chris Millis	Member	NEW HANOVER	Professional Engineer		
George Johnson	Member	NEW HANOVER	Real Estate		
Lisa Bullard	Board Treasurer and Secretary	PENDER	Teacher	NC Teacher's Certificate	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.

We understand that we, the Board of Directors, do not carry out management roles or responsibilities. We do however function as a team of like-minded, skilled community members who are the overall responsible entity for the school's overall success and failures. We make decisions based upon the information we are provided and what is best for moving the organization towards its ultimate vision and goals.

Our key responsibilities are to work with our CMO, TeamCFA

(1) to ensure the school's academic program is successful, measured by both internal and external assessments;

(2) the school's operational programs are faithful to the terms of its charter, including compliance with statutory and regulatory requirements; and

(3) the school is a viable organization, which includes, among other things, that it is financially solvent and has a competent and professional staff.

During the ready to open process, the board's primary responsibilities, will

be working with our CMO, Team CFA, build strong relationships in the community, recruit families and ensure our facility will provide a safe and secure learning environment. We will establish engaged committees and partnerships that will embrace and enhance the mission of the school and provide strict financial oversight, as called for by a fiduciary responsibility to the school. Once the school opens, we will shift from a founding board to a governing board.

Our role as a board includes to annually set the overall student outcomes; establish policy that is fair to all constituents and creates the operational boundaries; evaluate our partnership with the management company; approve substantial third party agreements and staff contracts; set the organization's vision and goals; evaluate the effectiveness of the school's operational plans; develop a sustainable governance model that recruits effective leaders; oversee the school's finances; and grow as an organization.

Our duties as a board revolve around three words: care, loyalty, and obedience. As stewards of the charter we must exercise reasonable care when making decisions, understand the finances, and participate in its governance; we must also attend all board and committee meetings and participate in decision-making and policy setting while actively participating in risk assessment and strategic planning. Our duty of Loyalty means that we will never use information obtained as a member for personal gain, and we will always act in the best interest of the organization by being aware of our conflict of interest policy, avoiding transactions that may result in financial gain. Finally, our duty of Obedience ensures we will not act in a way that is inconsistent with the central goals of the organization. This means we ensure the organization complies with all applicable laws and regulations and with its own internal documents and policies. Through our CMO, TeamCFA: CPC will recruit a Head of School who leads with the highest qualities of a leader. The TeamCFA organization has a strong reputation for the development of highly effective public charter school leaders who have experience developing high quality Core Knowledge schools. The TeamCFA: CPC board will approve the hiring of the Head of School. Before making our final decision regarding our Head of School, we expect to spend time with the candidates in school settings, community events, and interviews to ensure this leader knows and understands the challenges he/she will face as a founding charter school principal.

Supervision of the school leader will occur through a strong relationship between he/she, TeamCFA and the governing board. Team CFA and the board will agree on specific measurables, channels of communication and what items he/she will need to report to the board formally and informally. This will take intentional action and trust between both parties but is critical to the organization's long term success.

- 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 board will be comprised of no fewer than five and no more than nine

members with four officers. We aim to develop committees to assist with the deeper work of the board.

As a like-minded governing board, we have skill sets in the areas of facilities, education, charter school finance, school safety, and real estate.

We have a strong board with the following experience: retired clerk of court, teachers, professional engineer, retired sheriff deputy, and two board members have experience on charter boards in New Hanover County. In alignment to the organizational goals, the leadership team will present tangible evidences that the board will adopt to be the specific deliverables that demonstrate the progress toward each organizational goal. The school leader and each standing committee will collect and analyze specific data and report to the board based on the schedule according to the Outcomes Based Calendar. The lead administrator will create a plan based upon the data analysis. In addition, the board will host an annual retreat to gather to analyze yearlong data and program evaluations to determine if adequate progress is being made.

Our board, and partnering CMO, believe the purpose of evaluation is to promote personal and professional growth. The TeamCFA: Pender Head of School will be evaluated based on the progress towards the organizational goals, management of the school's budget, development and navigation of the organization, progress towards a successful charter renewal, and good standing with the authorizer and community as noted in the prior section. Ultimately, the school's success shall correlate to the success of the school leaders ability to effectively lead the school. This evaluation will occur formally every six months. The Governance Committee will be assigned to perform this responsibility.

The board's composition will ensure active and effective representation of key stakeholders by including business and community members. We will continue to strike a similar balance on future boards as founding board members term end. We will also engage parents and other key stakeholders when engaging in such activities as fundraising and strategic long and short term planning.

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

The founding board members were recruited and selected for their varied backgrounds and common concern for providing educational choices and a quality education to the students of Pender County. Members of this board have been working to provide educational freedom to families in Pender County by providing high quality school choice. Members first looked at the private school option. After meeting with private school operators, members decided that tuition would be a barrier for many families. A charter school would allow many additional opportunities for them to select a school that best meets their needs. Members were selected based on interest and previous experience. Several meetings were held. From those meetings, leaders who wanted to take further action emerged and were selected to be on the board. The board has been working diligently to establish this public school of choice.

Board recruitment will be ongoing. There will be a succession plan in place that will include each member recruiting one to three potential new members that match their skillsets. These potential members will be added to a standing committee until there is a board seat available. We will work closely with these partnering stakeholders and hope to recruit many of them to join our board full time. If a position becomes vacant, new members may be elected within three months of the vacancy (based on the need), or at the scheduled annual meeting. Members will be recruited based on the needs of the board at the time and chosen based on recommendations from the Nominating Committee.

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

The board will hold regular meetings monthly and, with the assistance of the CMO, develop a strategic outcomes based calendar for maximum oversight of the organization, which will be submitted during the RTO process. Standing committees will meet between meetings for a deeper dive and analysis of the organization's progress.

*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.*

New board members will be assigned a mentor when they are elected to the board. That mentor will review the resource binder created by the founding board. The binder includes a copy of the charter application, the charter agreement with the state, the board's bylaws and policy manual, a copy of the Open Meetings Laws, a copy of all charter and public school laws, the expectations of a board member, and a calendar of monthly scheduled meetings. Most importantly, they will get an overview of the boards goals, successes and current challenges. Hopefully this new member will have spent time on a committee and have a strong understanding of the organization. Every board member will be required to attend at minimum eight hours of governance training annually. TeamCFA provides funding for board members to attend governance training. In addition, board members will have the opportunity to collaborate with board members from other TeamCFA partner schools., share best practices, and receive information on Core Knowledge, Singapore Math, NWEA MAP assessments and Edgenuity. Additional training scheduled could be feedback from experts (i.e. audits), state provided sessions, education on legal matters, strategic planning, nonprofit best practices, and personal time spent reading about how effective boards operate and then sharing insights gained as a result of that reading. TeamCFA or the Core Knowledge Foundation will also provide professional development to the faculty and staff. This will ensure continuity of our mission and will create open lines of communication between the board and the school community. We plan to retain legal counsel familiar with public school law to assist with training on open meetings/public records, compliance with our bylaws and other pertinent legal matters dealing with education.

Specific Training Topics:

A. Financial: After completion of training, participants will be able to demonstrate knowledge of creating, presenting, monitoring and implementing a sound financial plan and an approved budget. Participants will identify overall financial strength - viability; return on investment financial

planning; revenue growth - enrollment projection

B. Roles and Responsibilities: This annual training will ensure our members understand that their role is to govern "How Well" the plans of the operations team ("How Will") are meeting the needs of the scholars, staff and stakeholders.

C. Legal Compliance: This session will review our organization's most critical documents, federal, statutory and regulatory requirements (including open meetings laws).

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.*

Pursuant to the Non-Profit Corporation Law NCGS 55A-8-31, the board shall comply with voting and disclosure provisions of the Director Conflict of Interest. Our bylaws and policies will detail the procedure for identifying and addressing conflicts. The proposed bylaws are submitted as part of this application.

Steps the Board Will Take:

Persons Concerned: This policy is directed not only to Directors and officers, but to all employees who can influence the actions of the school or its Board, or make commitments on their behalf. This will include all who make purchasing decisions, all persons who might be described as "administrative personnel" and all who have proprietary information concerning the school.

Disclosure:

Full disclosure of identity of any relationships of the governing board, charter school employees, or potential contracts will be communicated and vetted openly. In compliance with the law, the following procedures will be implemented and will apply to board members and all school personnel operated by TeamCFA: Pender. Disclosure will be made as soon as a potential conflict is discovered. When a possible conflict has been disclosed, the Board will determine whether a conflict actually exists and whether it is material. Where a material conflict exists, the Board will determine whether the recommended transaction or other conflicting involvement may be authorized as just, fair, and reasonable to the school. The decisions of the Board will be guided by independent counsel as appropriate, and their guiding principle will be the integrity and best interests of the school and the advancement of its purposes.

The following describes the procedure that the Board will employ when dealing with a potential conflict of interest:

Any Board member having a possible conflict of interest on any matter will not vote or use his or her personal influence on the matter, and will be recused from final discussion and voting after answering all Board questions and fully informing the Board of all pertinent detail.

The Chair of the Board will appoint a neutral person or committee to investigate alternatives to the proposed transaction. After exercising due diligence, the Board will determine whether the school shall proceed with the desired action. The Minutes of the Board will reflect all conflicts of interest disclosures and abstentions from voting and the existence of a

quorum.

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

The primary decision-making process the Board will use is deliberation as an authorized group (full-Board or committees) based on research, analysis, counsel feedback, and experiences in monthly regular or special meetings to address the issues regarding the school's operation and compliance. We will also work in partnership with TeamCFA and their experts. This will be the only way for the board to be truly effective when making important decisions. The meetings will be organized in a way that invite debate and discussion but also manage conflict and problems that arise as a result of healthy debate. The board will work with key stakeholders (parents, community members, lead administrator) to gain a well-rounded perspective with regard to school policies. Additionally, the board will reach out to other successful charter school boards to utilize their perspective and wisdom with regards to school policies. As with all the decisions made by the board, paramount is the fact that these policies support the mission and goals of TeamCFA: Pender.

Our policies will be value-oriented and product driven; legal and do NOT deny constitutional rights; communicated to ALL stakeholders; and written within the scope of the FULL boards authority. The policies will be adopted with the full authority of the board.

In developing school policies, initial recommendations will come from committees, Head of School, and parents based on whether our policies are meeting our desired purpose and the law. The process will be as follows:

- A need will be identified.
- Data will be collected.
- Recommendations will be made.
- Policy will be drafted.
- Policy will be introduced for stakeholder input.
- Policy will be presented to the board for discussion and a vote.
- Policy will be embedded into the school's manual, disseminated, and communicated.
- Policy will be reviewed annually as needed.

*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.*

TeamCFA: Pender proposes to enter into a CMO contract with TeamCFA. They will be provide:

1. Marketing and student recruitment support.
2. Academic programming support.
3. Student accounting and full financial services.
4. Access to experience of TeamCFA network schools.
5. Lesson plans for the entire school year.

TeamCFA is a managing partner with the TeamCFA: Pender board. They will be responsible for the "How Will" for the school's overall planning and implementation. They will work in collaboration with the board to ensure the overall school mission, purpose, and key tenets of the education plan are implemented with fidelity throughout the learning organization.

The board will form advisory groups to advise the board in four basic areas: governance, academics, finances, and development. Only the board has the authority to make decisions and take action in these four areas, although the board will seriously consider input from the following advisory bodies:

a. Parent Teacher Organization: The role of the PTO is to support the teachers and staff in their mission. They will be their own entity and report to the Head of School.

b. The Nominating Committee: The Nominating Committee will consist of members of the board who will recruit and nominate new members to the board.

c. The Academic Committee: The Academic Committee will consist of board members and the Core Knowledge experts from both the elementary and middle school. The Academic Committee will ensure that the mission of the school is being realized in the classroom by analyzing test data, completing site observations and gathering input from the school community. They will report their findings and make recommendations to the board.

d. The Finance Committee: The Finance Committee will consist of board members. The members of this committee should possess a strong financial background. They will review and make recommendations on the budget proposed by TeamCFA, as well as on other major financial decisions impacting the school. They will report directly to the board.

e. The Personnel Committee: This committee will consist of board members and will work with the Head of School in personnel matters. The Head of School will recommend the hiring of staff and teachers. The final hiring and firing decisions rest with the board. They will also work in conjunction with the Finance Committee regarding employee compensation and benefits.

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

TeamCFA: Pender is committed to a positive learning environment, and it encourages open discussions among employees, administrators, board members, parents, and students. Occasionally, concerns or questions may arise among members of our school community. If a parent has a problem with regard to a teacher or other employee following steps should be taken as needed:

1. Discuss this problem with the related party immediately.

2. If there is no resolution to the issue, communicate the concern to the Head of School. This may result in an additional meeting with the related party and Head of School. As an employee of the CMO, when appropriate the Head of School would then reach out to the CMO for advisement regarding the grievance.

3. If there is no resolution to the issue, the parent may file a grievance by following the board's policy and grievance process.

4. The board or appointed committee will receive the grievance and determine the next steps, including contacting the CMO for insight and guidance regarding the grievance.

If an employee has a concern or complaint, then the employee should follow the steps outlined below:

1. Concerns and complaints should be communicated to the Head of School. When appropriate, the Head of School will reach out to the CMO for advisement regarding the grievance.

2. If the matter concerns the Head of School or if the matter remains unresolved after the meeting with the Head of School, then the employee may follow the boards policy and grievance process, which includes communicating in writing with the Chair of the board Governance committee appointed specifically to respond to grievances. This committee will contact the CMO for insight and guidance regarding the grievance. Ultimately, the board decides on any responses or action steps as responses to the grievance.

### 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: TeamCFA  
Address: 152 East Main Street  
Forest City NC 28043  
Website: [www.teamcfa.org](http://www.teamcfa.org)  
Phone Number: 812-599-6530  
Contact Person: Gregg Sinderson  
Fax: 999-999-9999  
Email: [gsinderson@teamcfa.org](mailto:gsinderson@teamcfa.org)

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.

TeamCFA: Pender elected to partner with TeamCFA as our CMO to reduce risk

and maximize student achievement. They have a proven educational model.

In addition to supporting a strong network of schools, TeamCFA has extensive experience in governance, operations, and academics. After investigating the possibility to pursue a private school, we decided to pursue opening a public charter. One board member had experience with TeamCFA in opening Coastal Preparatory Academy: A Challenge Foundation Academy. We did not consider other CMO's or EMO's because TeamCFA's education plan aligned with our mission and values.

Because they have a proven educational model that aligns with our goals and community, we are confident that together we can operate a successful school that effectively teaches students and reaches its stated mission. TeamCFA will assist with the Ready to Open process, and they will recruit and recommend the hiring of the Head of School. They will provide financial and PowerSchool Services, and they will provide website, logo, mascot, marketing, and student recruitment support. They will provide financing for some of the start-up costs, such as the principal's salary prior to July, curriculum, technology, and furniture. Bottom line, they are a North Carolina based non-profit that knows how to open and operate charter schools. TeamCFA will be an excellent partner.

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 TeamCFA: Pender board's focus was to evaluate whether we wanted and could open the school ourselves or to partner with TeamCFA. We were led to TeamCFA by other leaders we respect in the NC Charter School industry. They are located in our county. We are aware of the high-performing model found in Thomas Jefferson Classical Academy: CFA in Forest City.

TeamCFA was the only CMO considered because of their alignment with our mission and goals and the experience our board member had with TeamCFA at another school.

Their fee is 10% of total revenue. They will support us in the facility development process but did not require us to work with them directly on the facility. Their core values line up with our values and goals and are confident that it is the best fit for TeamCFA: Pender. Together, we are excited about educating the next generation of great American citizens.

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?*

The highest performing school in the TeamCFA network is Thomas Jefferson Classical Academy, CFA in Forest City, NC. It is a rural community like Stanley. They produce college and career ready students. The performance at the elementary school is 85 to 90% proficient. The school has consistently performed at the high B or low A range. In addition, it is ranked by US News and World Reports as the fifth best high school in North Carolina and

approximately 135th out of 38,000 in the United States.

The lowest performing school in the TeamCFA network is Aristotle Preparatory Academy: CFA in Charlotte, NC. We are very familiar with this school because their Head of School is a founding member of the Board of Directors. TeamCFA readily admits that they are not happy with the performance at Aristotle Preparatory Academy: CFA but the data demonstrates that the turn around is working but will take time. They serve a high poverty population that is very mobile. Proficiency rates at Aristotle Preparatory Academy: CFA are in the 45% range; however, performance is expected to improve by about 15 points in 2018-19.

- 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.*

We understand that the State of North Carolina grants the charter to the Board of Directors. We are responsible for the governance and oversight of the school, and we cannot delegate that authority. We will set up measures to monitor the financial and academic performance of the school. We are entering into a contract with TeamCFA to hire the Head of School and operate the school. We will be active and not passive board members. We live in this community and our why has not changed. We want to provide parents with the Educational Freedom to select the best education setting for their scholars. We want TeamCFA: Pender to be a destination of choice for the scholars and teachers.

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

The Board will approve all contracts for teachers and staff. TeamCFA will recommend the Head of School, and the board will approve. The Head of School will recommend and the board will approve all employee contracts. All teachers are employees of the school and not the CMO.

- 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 attached contract outlines the period of the contract, the responsibilities of both parties, and the terms for termination by either party.

- 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.*

Of the 14 public charters in the TeamCFA network, none have operated under the CMO model. TeamCFA: Pender will be one of the first operating under the

CMO model. Our budget shows projected surplus in each of the first five years. TeamCFA will assist with start-up costs that include hiring the Head of School, marketing, website, social media, logo design, ready to open process, policy and procedure development, financial services, PowerSchool services, furniture, curriculum, technology, etc.

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

**X Not Applicable**

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

**X Not Applicable**

### **Projected Staff:**

*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.*

Proposed Positions based on Annual Funding. Each year, instructional support positions, such as Assistant Teachers, will be based on school's growth model and annual funding 2020-2025.

Projected Staff:

Head of School

Assistant Principal

Administrative Associates

Core Content Teachers

Exceptional Children's Teacher

Exceptional Children's Director

Instructional Coach

Elective/Specialty Teachers (Foreign Language, PE, music and art classes)

Assistant Teachers (K-2)

Information Technology (Contracted)

Transportation (Contracted)

Food Service (Contracted)

Guidance Counselor

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

Include the following information for the proposed charter school:

TeamCFA: Pender will have an opportunity to recruit through a national network as well as locally. We will attend and potentially host job fairs in and around Pender County. We will also work with regional colleges and universities to help identify qualified and interested candidates for our available positions. We additionally anticipate the state's HR system to be a strong resource for recruitment.

TeamCFA: Pender will focus on people first and provide an atmosphere of respect for all faculty and staff members. Our decision-making processes will intentionally include staff to help guide the school's leadership in accomplishing the mission. Teachers will be supported professionally through learning communities, high level professional development, instructional coaches, and internal mentoring system. We aim to provide teachers a competitive benefits package and will be paid commensurate with their experience. The school will offer a 401(k) plan to all full-time employees. This type of plan, a defined contribution plan, versus the state's defined benefit plan, is more flexible for most teachers and is portable. In addition, the plan will provide for an employer match of up to 3% employee annual contribution.

Full-time employees will also receive health insurance with employee coverage paid in substantial part by the school as well as life insurance and disability benefits. The school is currently planning to forgo the state retirement plan and health plan but will make that decision final upon the charter approval. The costs of mandatory unemployment and workers compensation insurance will be incurred by the school. Our Assistant Teachers will serve as a built-in recruiting source for new teachers. Many will be certified or working toward certification and will be candidates for open teaching positions.

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

The TeamCFA: Pender board will approve the hiring of a strong Head of School who will be responsible for leading staff and effectively managing finances and operational systems. The relationship between the board and Head of School will be one of trust, unity, and accountability. Our Head of School will lead through example and provide the board with critical information to help the board make critical decisions at every meeting. We anticipate that our board chair or designee will be in communication with the Head of School to support their decisions and to keep the board in the know about any anticipated barriers or news. All communication from employees will be directed towards the Head of School.

The board will communicate to the employees through the Head of School. The board will rely on timely and accurate reporting as well as internal and external surveys to determine whether the policies, plans and procedures are creating a strong employee atmosphere. There are no direct lines of communication from staff to board unless previously authorized by the full board. If issues arise between employees, the board will ensure proper procedures are carried through and each employee has an opportunity to be heard in hopes of a professional resolution. An employee grievance policy will be in place and followed if required in the mediation process.

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

TeamCFA will recommend the hiring and dismissal of the Head of School. The board will approve the recommendation. The Head of School will recommend the hiring and dismissal of the teachers and staff. The board will approve the recommendations.

The hiring process will include practices to understand how each employee is

exemplary in communication, relationship building, and collaboration. In addition, we will hire teachers who are coachable, hungry to learn, and socially smart. TeamCFA: Pender will recruit faculty that embrace our mission to foster student learning and achievement and inspire students to become independent thinkers, effective communicators, and contributing citizens of a global society.

Our required applications will contain:

- a sealed college/university transcript, indicating a cumulative GPA of 3.0 or higher;
- a clean National Criminal Background Investigation Check;
- three letters of reference documenting leadership and community service;
- submission of sample teaching video;
- demonstration of superior writing skills through submission of writing samples; and
- teaching portfolio with sample units.

Our hiring process will include:

1. Initial screening interview.
2. Teaching observation to observe abilities to engage, educate, and communicate.
3. Formal interview to debunk any theories.
4. Participation in school events to determine how you interact with others.

The board may need to approve dismissal of staff members based on their actions. Our Head of School will be responsible for creating the evaluation tool, providing effective feedback, and utilizing experts to help educators to grow. An employee may be placed on an action plan prior to recommendation for dismissal; however, no one is more important than the overall culture of the school. The board may verify these processes were carried out with fidelity through an internal committee or external review.

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

- \* Lead Administrator - \$75,000 - \$80,000
- \* Assistant Administrator - \$50,000 - \$60,000
- \* Full Time Core Teachers - \$35,000 - \$50,000
- \* Elective/Specialty Teachers - \$35,000 - \$50,000
- \* Guidance Counselor - \$38,000 - \$45,000
- \* Administrative Assistant - \$25,000 - \$32,000
- \* Teacher Assistant - \$22,000 - \$33,000
- \* Instructional Coach - \$40,000 - \$60,000
- \* Exceptional Children's Teacher - \$35,000 - \$50,000

As stated above, TeamCFA: Pender will not participate in the state retirement plan, but the school will offer a 401(k) program with matching contributions up to 3%, health care and life insurance to all full time employees. We will not offer retirement, health insurance, or life insurance to part-time employees.

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

The Head of School retains the discretion at all times to recommend termination employment or to decide what type of discipline is warranted, if any. All employees of TeamCFA:Pender are at-will employees whose employment can be terminated at any time, without first implementing any other type of

disciplinary action. TeamCFA: Pender is not required to use any of the following steps of discipline, or to apply them in any particular order, but retains the discretion at all times to determine the nature and severity of discipline and/or termination. In the event it becomes necessary to discipline an employee, TeamCFA: Pender will determine in its discretion given the circumstances of the situation the appropriate action amongst such options as:

1. Verbal Warning
2. Written Warning
3. Suspension, with or without pay
4. Final Warning and/or Probation
5. Termination

The TeamCFA: Pender board retains the discretion to determine if the circumstances of a particular case warrant termination for the first offense, or whether one of the other four forms of discipline listed above is warranted. Further, if an employee's conduct, performance, work habits, or attitude becomes unsatisfactory or unacceptable in the judgement of the TeamCFA: Pender, including based on violations of any school policies, rules, guidelines, regulations, or rules of conduct, whether contained herein or in other documents, they will be subject to disciplinary action up to and including termination. Grievances shall follow this process: The employee meets with the Head of School to discuss the grievance. If a satisfactory resolution is not reached, then the employee will submit a formal grievance in writing to the Board Chair or designee. The chair or designee will convene an ad hoc board subcommittee to investigate the grievance, whose investigation includes consulting with the CMO. The subcommittee will recommend a resolution within 30 days of receipt of the written grievance.

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

In our initial three years, most of our employees will have dual positions and we anticipate our funding for our positions to be from State Funding, Local Funding, State and Federal EC Funding, and other Federal funding. Positions will be: EC Teacher (could be EC Director)

Administrative Assistant (PowerSchool Manager and Financial Services support)

PE Teacher (Athletic Director)

Guidance Counselor (Testing Coordinator/504 Coordinator)

Content Teacher (Interventionist)

*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.*

TeamCFA: Pender will ensure that the hired and properly licensed special needs teachers are experienced. TeamCFA: Pender will provide an experienced part time ELL teacher to assist with any child that is an English Language Learner. TeamCFA: Pender will also provide all full time and part time teachers with the proper training and staff development to prepare for both ELL and gifted students.

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

TeamCFA: Pender's staff will be held to high quality standards by carrying

out the TeamCFA: Pender mission every day. All staff members are expected to communicate clear expectations and goals, uphold all legal, professional, and ethical requirements of the profession, and create an environment conducive to learning. Detailed expectations for each role are outlined below:

Core, ELL, EC, and Specialty Music, Physical Education and Technology:

- Hold a bachelor's degree or equivalent education experience.
- Teach the Core Knowledge Sequence in alignment with the NC Essential Standards.
- Create a classroom climate conducive to learning.
- Create open lines of communication with parents.
- Offer tutoring and enrichment activities to scholars as needs arise.
- Communicate clear expectations, goals, and grading requirements to both parents and scholars.
- Differentiate lesson plans to fit the needs of individual scholars.
- Maintain and keep current records on all students, including portfolio work and grades.

Head of School:

- Hold a Master's Degree in Administration or equivalent education and experience and must have five years of administrative experience.
- Ensure that the Core Knowledge Sequence in alignment with the NC Essential Standards are being implemented in the classroom on a daily basis.
- Supervise and manage the TeamCFA: Pender's staff and report on the school's overall operation to the TeamCFA: Pender's board of directors every month.
- Responsible for handling student and staff conduct in accordance with TeamCFA: Pender's student and staff handbooks.
- Will be active in coordinating the TeamCFA: Pender's professional development plan.
- Oversee the creation and implementation of the school's marketing plan.
- Ensure that the school operates within the budget and be responsible for all fiduciary requirements.

Administrative Assistant:

- Hold an Associate's degree or equivalent experience.
- Have at least two years experience as an administrative assistant.
- Coordinate and run the TeamCFAPender's front office and adhere to all duties encompassed therein.
- Coordinate school volunteers.
- Assist the assistant administrator and the lead administrator as the need arises.

Assistant Administrator:

- Have a bachelor's degree.
- Coordinate and maintain the teacher licensure program.
- Have two years or more of administrative experience.
- Assist in coordinating the professional development plan.
- The lead person to whom all contract positions report; this includes being the point of contact for the PowerSchool administrator.
- Report to the Head of School.
- Assist in marketing.

Assistant Teacher:

- Preferably hold a Bachelor's degree.
- Preferably hold a teacher licensure or be working towards it.
- Work with "At-Risk" students both in small groups and one-on-one.
- Support classroom teachers through tutoring, small group instruction and any other needs that may arise.
- Be trained in Core Knowledge.

School Counselor

- Must hold a Bachelor's degree.
- Develop and maintain a plan for delivery of the school counseling program.
- Maintain current and appropriate resources for educators and parents.
- Provide direct services through the guidance program, student planning, and preventive and responsive services.

Instructional Coach:

- Must hold a Bachelor's Degree - Coordinate the school's Core Knowledge program
- Train new teachers in Core Knowledge
- Assist teachers in Core Knowledge

**Staff Evaluation and Professional Development**

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

The Head of School will be responsible for ensuring there are systems and procedures for the potential teacher licensure renewal opportunities. The Head of School will appoint a teacher leader to drive this process.

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.*

Initially, the goal for TeamCFA: Pender will be to organize a healthy organization that will foster a culture necessary to recruit, hire, and retain teachers that live and breathe the organization's mission. All beginning staff and teachers will be assigned a mentor who will work closely to develop initiatives, plan lessons, and grow their classroom management strategies. The mentor teachers will also observe and provide feedback to their developing teachers at least four times a year. We anticipate a strong mentoring program will ensure that teachers will feel supported and will promote teacher retention. The Instructional Coach shall ensure a strong implementation of the Core Knowledge curriculum and encouragement for teachers to create vibrant, cross-curricular, collaborative units that will give our faculty a sense of ownership and will also result in teacher retention.

TeamCFA: Pender leaders, in combination with TeamCFA: Pender staff, including an Instructional Coach, will develop a teacher evaluation instrument that will evaluate a teacher's ability to implement the Core Knowledge Sequence with fidelity. Allowing teachers input into this process will also give them a greater ownership in the solution since they will be evaluated in a manner that they helped develop; in addition, this will create more effective leaders who model the type of teaching that is

expected. TeamCFA: Pender will work closely with TeamCFA, and NCDPI to ensure that our teachers meet the teacher licensure renewal criteria. Upon being hired, teachers must provide any teacher's license from NCDPI. Each teacher is responsible for keeping their licensure and certifications so that they meet the requirements from NCDPI and the SBE policies. In compliance with state law and policy, at least 50% of TeamCFA: Pender's teachers will hold a current teacher certification.

For new teachers, TeamCFA: Pender will follow the approved Beginning Teacher Plan, which includes a teacher self-assessment, professional development plan, a pre-observation conference, three formal observations with post-conferences, a peer observation with post-conference, summative evaluation conference, and summary rating form. For administrative and support staff, the Head of School will evaluate them twice a year, using a rubric developed by the staff in alignment with their job description.

- 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.*

We believe classroom success rises and falls with leadership, and our professional development will focus on developing leaders in the Core Knowledge Sequence. In workshops, we will model active instruction that teachers can use in the classroom. Teachers will take a pre- and post-tests to assess their understanding, and they will create products to use in the classroom with their scholars. Teachers will participate in professional development that is meaningful, and they will emerge with a plan for the year that will create a sense of purpose and attachment to the mission of both the Core Knowledge Foundation and the school.

There are ten teacher work days dedicated to professional development. Five of these days will be facilitated by leaders from TeamCFA or trainers from the Core Knowledge Foundation with time being dedicated to cross-curricular planning and collaboration.

Teachers will work with the Head of School to set individualized goals related to areas of weakness, areas of interest, and areas of need (as evidenced by data gathered on scholars from each preceding school year) at the beginning of each school year. The Head of School will then work with teachers to provide professional development opportunities which aid such teachers in fulfilling their goals.

Teacher professional development will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. Teachers will also learn to act as facilitators of learning, guiding scholars to discover truths through kinesthetic, auditory, and visual learning. The instructional coach provides teachers with the necessary training in core subjects as well as variety of instructional delivery methods, working with teachers to model lessons, increase content and skill retention, increase rigor, and develop a learning environment conducive to growth.

- 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.*

The ten pre-service days have specific times dedicated to Core Knowledge Sequence professional development, giving teachers further opportunity to create broad outlines of their plans for the coming school year. The methods utilized in the Core Knowledge Sequence may be somewhat new to teachers, so it will be particularly important for them to work together during this time to create a map of the year. The instructional coaching team from TeamCFA or the Core Knowledge Foundation will be integral in developing the desired outcomes content of academic sessions. In addition, staff will receive training in NWEA and Edgenuity. On the first workday, teachers will attend a retreat that will promote team-building, collaboration, and culture at TeamCFA: Pender. All faculty and staff will be required to attend. The next four workdays will be dedicated to further development of Core Knowledge Sequence, school policies, procedures, and school wide expectations. Through the intense training from TeamCFA or the Core Knowledge Foundation and the ensuing workdays, teachers will be prepared to begin delivering the content of the curriculum as outlined in the Scope and Sequence.

Other Non-academic Training include the following:

- BloodBorne Pathogens and other Health Requirements.
- Orientation.
- Benefits.
- Technology Systems Training.
- Procedures and Policies.
- Communication with Parents.
- PowerSchool.
- Emergency Plans.
- Teacher Development: Mentoring and Evaluations Teacher Feedback Protocols.

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.*

We anticipate having multiple members of our staff attend professional development workshops provided by TeamCFA. These summer sessions will kick off our professional development sessions for the upcoming academic year. This multiple day event may provide up to 40 hours of strategy, development, and collaboration with other TeamCFA schools and national experts. Beginning in August, there will be high-quality and specifically-designed professional development, for a total of 80 assigned hours. At least six of those professional development days will be entirely devoted to the Core Knowledge Sequence, Singapore Math, and utilization of NWEA MAP tools. During the school year, there are workdays dedicated on the calendar for further PD on Core Knowledge, classroom management, and school culture, and there are days dedicated to completing and submitting grades and parent/teachers conferences. The daily schedule is not affected by these days. There are multiple scheduled 1/2 days and teacher workdays strategically set up for professional development, data analysis, and parent conferences. The staffing structure with beginning and seasoned teachers, will create a collegiate atmosphere and respect among all members of the faculty as different staff members will have opportunities to present based on their skill sets and classroom practices throughout the year. The master schedule will allow for common grade level planning time and Professional Learning Communities.

## **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)).*

TeamCFA: Pender understands that to be successful as a charter school, we must maintain full enrollment of students in our first year. This will be accomplished through teamwork of the TeamCFA: Pender board, Head of School, and our CMO. TeamCFA will also provide a website to communicate with potential students and parents. We will also utilize social media such as Facebook to advertise to and educate the general public. We will participate in community events and hold community information sessions. To reach and maintain full enrollment we plan to implement an ongoing marketing plan that includes, but is not limited to, the following:

Charter Application Phase: September 2018 - March 2019 Goal: Gather additional information regarding the educational need or interest for a public charter school from 400 families; recruit additional critical friends for committees; and add five potential community partnerships.

Action: Participate in community events, visit daycare facilities, and hold community information sessions. Conduct a series of public relations endeavors to publicize the school to the community at large so that interested parties will be aware of the school's upcoming application submission. Strengthen the social media presence, email blasts, and communication with local community regarding application submissions dates and processes. Receive interest forms from parents.

Ready to Open Period (March 2019 - September 2019) Goal: Obtain 200 Letters of Intent (LOI). Educate parents that Letters of Intent cannot be utilized as applications for enrollment.

Action: Collect contact information utilizing LOI format and recruit prospective volunteers and board members. We will utilize our best marketing tools, our enrolled families, and host community gatherings, public charter school town hall meetings and potential employment fairs. Members of the board of directors will visit local preschools, day cares, churches, other child related organizations, and community organizations, such as the YMCA, to distribute information. Once the Head of School is in place, he or she will perform this duty in conjunction with board members. We will also speak at local civic meetings, such as Rotary Club, Kiwanis Club, Civitan Club, etc. To ensure that we are reaching all demographics, we will conduct community meetings open to the public in Stanley and throughout Gaston County at branches of the local public library and at local churches. At

these meetings, we will use a powerpoint presentation to provide information about the school and the application process. One of our board members and one of our consultants are bilingual and will assist in interpreting during the meeting and translating brochures and fliers. A representative of TeamCFA: Pender will attend community events to promote the school.

Open Enrollment and final RTO Period (September 2019–July 2020) Goal: Secure 1,000 applications for enrollment.

Action: Send direct mailing to households in specific zip codes. After the lottery, we will utilize our best marketing tool, our enrolled families, and utilize them to host community gatherings, public charter school town hall meetings and potential employment fairs.

First 20 Days of School (August 2019) Goal: Build and sustain waitlist >25% above capacity per grade.

Action: After testing marketing strategies that worked best, we will focus our attention on the top two strategies and continue to promote in the community.

### **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.*

TeamCFA: Pender will engage parents and the residents through community meetings, the use of the news media, online social media, religious organizations, preschools, promotional videos, and building strong relationships with the local business community. Organized effort by parents and community leaders to notify the public about TeamCFA: Pender will distribute information forms to the community. Board meetings will be transparent and maintain a section of time built for public comments. We will also schedule town hall meetings to allow the community to express their larger concerns.

TeamCFA: Pender will engage parents early. Prior to the school opening, we will plan events for students enrolled or intending to enroll. Frequently during the school year, we will highly encourage them to volunteer and play an active role in their child's education. Through the school's intense focus on character development, there will be an increased focus on bridging the gap between home life and school life. Bridging this gap will include several interactive lessons that will build on parental involvement. These lessons will be presented at evening events, opened to the public, displaying student work, varying from the arts to core subjects, including science and technology. Parents will be invited to participate in the Core Knowledge Domain Celebrations.

TeamCFA: Pender will also develop a strong Parent Teacher Organization with parents and teachers working closely together to carry out the mission of the school. The board will encourage open and transparent communication with

parents and encourage parents to become a part of the fabric of TeamCFA: Pender. Leadership will write monthly newsletters to provide the state of the charter and new happenings. At the end of the year, the leadership team will collaborate with PTO to write the "State of the Charter" address. This document will be utilized to write grants and request outside funding to further support the school's needs. One intentional parental engagement tool will encourage parents to volunteer. They will be made aware of volunteer opportunities by email, social media, and newsletters.

## **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.*

1. Immediately following preliminary approval of our charter, TeamCFA: Pender will conduct open enrollment. In community information sessions and in social media posts, we will make interested parties aware of the enrollment process and timelines. The tentative enrollment period will begin September 15, 2019, and will run through December 1, 2019. The application will be available to fill out both online and in print format. It will be available in both English and Spanish. Immediately following the closing of the enrollment period, TeamCFA: Pender will determine if a lottery is needed, in accordance with NCGS 115C-238.29F(g)(6). If a lottery is not needed, all applicants will be accepted and parents and guardians will be notified. Parents and guardians need to respond about their student's attendance at TeamCFA: Pender within the timeframes outlined in our enrollment policy. If a lottery is needed, a date will be set for the lottery, which will take place no more than two weeks from the close of the enrollment period and will only include the names from the enrollment period noted above. Parents and guardians of applicants will be notified of the date and time of the lottery. The lottery will be open to the public and names will be decided by a computerized randomization system in accordance with the policies adopted in the North Carolina Charter Schools Act and by the State Board of Education. Once the names are chosen, the parent or guardian will have to respond within the timeframes outlined within our enrollment policy.

2. As set in NCGS 115C-238.29F(g)(5a), TeamCFA: Pender will abide by the following:

-Children of the active board members and full-time staff members will receive priority admission, up to 15% of the total enrollment. Other preferences required or allowed for by law will be outlined in our

enrollment policy.

3. We anticipate developing a waiting list of students. If a student withdraws, the next name on the waiting list will be offered a seat, and that student's parent or guardian will be given one business day to respond. The Head of School will develop a process to maintain effective student records and transfer documentation in a timely manner.

4. As stated above, we will utilize community meetings and open forums prior to the beginning of the admission's process. The purpose of these is to inform the public of the enrollment period, as well as to share our vision and mission with interested parents and community members.

5. In the event that a student from the school transfers, the parent or legal guardian should immediately notify the school. TeamCFA: Pender will verify the withdrawal of the student and offered to the next student on the waiting list.

### **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.*
- 2. A thorough description of the processes and procedures the applicant intends to use to*

*effectuate the lottery.*

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

**PROJECTED ENROLLMENT**

**Year 1 through Year 5**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Pender County Schools  
 LEA #2 New Hanover County Schools  
 LEA #3

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

	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA 710	LEA 650	LEA 000	LEA 710	LEA 650	LEA 000	LEA 710	LEA 650	LEA 000	LEA 710	LEA 650	LEA 000	LEA 710	LEA 650	LEA 000
Kindergarten	65	10	0	85	15	0	80	20	0	80	20	0	80	20	0
Grade 01	65	10	0	65	10	0	80	20	0	80	20	0	80	20	0
Grade 02	65	10	0	65	10	0	65	10	0	80	20	0	80	20	0
Grade 03	65	10	0	65	10	0	65	10	0	80	20	0	80	20	0
Grade 04	40	10	0	65	10	0	65	10	0	80	20	0	80	20	0
Grade 05	40	10	0	40	10	0	65	10	0	65	10	0	80	20	0
Grade 06	40	10	0	65	10	0	80	20	0	80	20	0	80	20	0
Grade 07	0	0	0	65	10	0	65	10	0	80	20	0	80	20	0
Grade 08	0	0	0	0	0	0	65	10	0	65	10	0	80	20	0
	380	70		515	85		630	120		690	160		720	180	

<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
CPC? Mr. Benson's responses to the Board questionnaire do not align to the school's application (school mission, evaluation of the success of the school, etc). Have background checks been performed for current board members?	Jonathan Bryant	Governance a
Clarification needed on how additional board members will be recruited.  There are several committees listed and only 5 board members listed. Additional board members will be needed in order for this method to be effective.	Jessica Kelly	Governance a
Is the school planning on adding a nepotism policy to its bylaws?	Austin Smigel	Governance a
Applicant needs to clarify: What is the recruitment plan for recruiting more board members?	Kristen Parker	Governance a
Aristotle's Head of School is not listed as a member of this governing board (but she is on the board of CFA CPC). Was this section "borrowed" from the CFA CPC application?  Applicant describes the performance of the highest and lowest performing schools - what is the performance of most CFA schools? The application explicitly mentions targeting students on the waitlist at Coastal Prep, but does not discuss the academic performance of that school. Why is that?  Do any of the board members have experience overseeing a management organization and holding them accountable? What evidence does the board have that they will be able to hold CFA accountable?	Danielle Allen	Proposed Man
"Team CFA is located in our county" - not sure of this reference as the application states that there is not a charter presence in Pender Co. Also unclear why Stanley ("rural community like Stanley") is mentioned in this section.	Jonathan Bryant	Proposed Man
How will Pender TeamCFA ensure that TAs will have teacher certification or working toward this - especially with regard to the current state of teacher availability in NC? Will pay of TAs encourage this (higher than normal TA pay)? What percentage of health insurance will Pender TeamCFA pay? For hiring/firing - is the Board's role to simply be a rubber stamp, or will they go through a process of evaluation/approval? If so, what does this process look like? May want to check whether counselor is allowed to serve as testing coordinator - per NC statute.	Jonathan Bryant	Staffing Pla
ELL teacher not listed yet was part of your at-risk plan. Please clarify.	Jessica Kelly	Staffing Pla
What theories will be debunked in the hiring process? How will the formal interview be used to do this?	Danielle Allen	Staffing Pla
Will staff be compensated for PD they attend during the summer, or will this be built into their contract?	Jonathan Bryant	Staff Evalua
Applicant needs to clarify: How will teachers be evaluated on other curriculum? Core Knowledge is outlined in the narrative but no other curricula is mentioned.	Kristen Parker	Staff Evalua
Where is training accounted for in the budget?	Austin Smigel	Staff Evalua
How will Singapore Math and Core Virtues implementation be evaluated? Please clarify.	Jessica Kelly	Staff Evalua
Is \$5,000 enough to market in Pender County to have an anticipated 1st year opening of 450 students?	Austin Smigel	Marketing Pl
Is the marketing plan represented properly in the budget?	Jessica Kelly	Marketing Pl
How will parents whose student(s) is on the waiting list and now being offered a seat be notified? Is one business day a reasonable amount of time to expect them to make a decision?	Danielle Allen	Admissions P
What evidence does the school have (outside of waitlists from other schools) that parents in Pender/New Hanover counties are desirous of this school? Why has no survey data been presented?	Danielle Allen	Projected St
Unsure if these projections are realistic, especially since it does not appear that a community survey was given.	Jonathan Bryant	Projected St

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Austin Smigel	Pass
Bruce Friend	
Danielle Allen	Pass
Jessica Kelly	Pass
Joe Maimone	
Jonathan Bryant	Pass
Jonathan Bryant	
Lindalyn Kakadelis	
Kristen Parker	Pass
Phyllis Gibbs	
Robert McOuat	
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.*

Our plan will consist of a variety of offerings to ensure that all enrolled students have a choice about how they will arrive at school each day. Coastal Preparatory Academy: CFA has approximately 630 scholars enrolled and does not offer transportation. we expect the majority (2/3) of children will arrive by car.

We plan on purchasing two used school buses and build a strategic cluster stop system to transport children (approximately 115). We will utilize a program such as Google Fusion (based on student addresses) to determine the best location for a cluster stop. Over the next year, we will determine the method in which students will qualify for transportation. Since we want to ensure we are meeting the needs of all of our children, factors may include living distance from the school, economic status, and special circumstances. Transportation will not be a barrier for any scholar attending TeamCFA: Pender.

As the school grows, our goal is to purchase more school buses and potentially replace these original buses with a higher quality model to reduce maintenance. We will also budget funding to incorporate initiatives like providing gas cards to our families that are able to carpool multiple families. In addition, this line item will include local cab companies or transportation service to provide transportation for extreme circumstances for a short term until more solidified plans are in place. If a child enrolled in the school and has related services based on their IEP, we will independently contract with a provider to ensure this student is bussed. These funds to pay for such a service may be requested from special state reserve or will be identified in our budget if this is a need.

Our transportation budget includes the following:

- \$45,000 to purchase used buses.
- \$24,000 for gas for cluster stops up to 25 miles.
- \$20,000 Oil, Tires, and Maintenance.

### 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.*

TeamCFA: Pender is fully committed to ensuring that no child lacks a daily meal, whether this is due to financial need or simply because they forgot their lunch. It is our intention to offer students the option of bringing their lunch or purchasing their lunch from a local catering service. The lunch schedule will be published monthly and students will have the option of buying from the catering service or providing their own lunches. For those students who are financially unable to provide themselves with a

school lunch, we will contract with a local catering service to provide one for them at our school. These students will be initially identified through the annual FRL form sent home in the enrollment packet. Adults overseeing lunch will be tasked with identifying any trends in students who are not eating, not being provided a nutritious lunch, or do not have a lunch. There is a line item in the operations budget of \$60,700 for the first year to provide for this expense. We will anticipate this line item growing annually. In addition, we have budgeted for part time staff to support the program.

As students do have a tendency to forget their lunches, we will also maintain a small food pantry for those students. This pantry is not intended as the regular source of lunch for those students who are financially unable to provide their own school lunch. As noted above, we will contract with a local catering company to regularly provide lunch for those students. This food pantry, however, will serve those students who simply have forgotten their lunch on any given day.

**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		\$1,726.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$4,277.00
Property Insurance	\$7,500,000		\$9,000.00
Motor Vehicle Liability	\$1,000,000		\$2,300.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$11,817.00
Total Cost			\$29,452.00

\*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.

katy\_ridnour 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.*

We have made significant progress towards land acquisition and facility planning. We plan to locate the TeamCFA: Pender school facility near the intersection of Mooretown Road and North Carolina Highway 210 on approximately 10 acres of land. We are in discussions with several developers and are exploring our financing options.

We plan to build a new facility in two phases. The initial phase will be approximately 45,000 square feet and will serve up to 600 students. The second phase will be approximately 22,500 square feet and our target student enrollment of 900 scholars.

One potential site is approved for a school facility. We have real estate, engineering and charter school facility experience on the board and understand the regulatory approval process to build a school and obtain an Educational Certificate of Occupancy. Our plan is to have an Educational Certificate of Occupancy by July 1, 2020.

*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.*

A developer will design, build, and finance the facility and offer us a lease with the option to purchase the facility with costs kept within 15% of revenue. These lease rates are comparable to other recently built charter schools in NC.

**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.*

We understand the regulatory approval process at the State and local level. We have identified potential sites for the school. Upon charter approval by

the State Board of Education, we will enter into a contract with a developer.

During the RTO process, we will submit the required facility contingency plan. The board will explore any and all options.

X

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<p>Rationale that Coastal Prep has 630 students and does not provide transportation (to support the transportation plan for CFA Pender) is concerning. Coastal Prep is predominantly white and affluent, and the decision not to offer transportation may hinder a more diverse student body from attending. Is this the target student population of CFA Pender? Keep in mind that 9 of Pender County's 16 schools currently receive Title I services.</p> <p>How will school determine whether a student needs transportation?</p> <p>Short term plans are helpful, but what is the process for finding students a longer term solution to transportation?</p>	Danielle Allen	Transportati
<p>Applicant needs to clarify: With an expected student population of over 900 students in year 5- will two buses be enough?</p> <p>Applicant needs to clarify: What evidence is there to support-"we expect the majority of children to arrive by car."</p>	Kristen Parker	Transportati
<p>Please clarify how it was decided that two buses would be sufficient when year 1 student enrollment is projected to be 450 students? Has research been conducted to determine the number of students who will need transportation?</p>	Jessica Kelly	Transportati
<p>"Qualify for transportation" - not all students will have access to transportation, if needed? What data supports that "the majority of children will arrive by car?" Will two busses suffice for the initial year? Pender is a large county (5th largest by land area).</p>	Jonathan Bryant	Transportati
<p>What will be the cost of the catered lunch program? What percentage of students does the school anticipate will need lunch provided? Are there any plans to provide breakfast for students who qualify for FRPL? How was the \$60,700 budget for lunch services determined? Using the estimate of 115 students requiring transportation, a budget of \$60,700 divided by 180 school days = \$337 per day, divided by 115 students = \$2.93 per lunch. Will that cover the cost of lunch from the catered lunch service?</p> <p>What types of foods will be stored in the food pantry? How will the school know which students forgot to bring lunch on any given day?</p>	Danielle Allen	School Lunch
<p>Applicant needs to clarify: Further information about the -"small food pantry" needs to be provided.</p> <p>Applicant needs to clarify: Who is the catering service? Has there been contacts made and estimates for cost?</p>	Kristen Parker	School Lunch
<p>Katy Ridnouer is not the Board Chair listed in the Governance section.</p>	Jonathan Bryant	Healthy and
<p>Contingency plan lacks detail.</p>	Jonathan Bryant	Facility and
<p>Contingency plan lacks detail. Is there nothing in place at this point?</p>	Danielle Allen	Facility and

<b>Reviewer</b>	<b>Score</b>
Jonathan Bryant	Pass
Tammi Sutton	
Jessica Kelly	Pass
Danielle Allen	Fail
Bruce Friend	
Austin Smigel	Pass
Alex Quigley	
Jonathan Bryant	
Lindalyn Kakadelis	
Kristen Parker	Pass
Phyllis Gibbs	
Robert McOuat	
Sherry Reeves	

TeamCFA: Pender - With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

Stephenie Clark	
Joe Maimone	

## 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>			
	<p>LEA #1 710 - Pender County Schools</p>			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,565.03	380	\$2,114,711.40
	Local Funds	\$1,509.31	380	\$573,537.80
	Federal EC Funds	\$4,464.16	38	\$169,638.08
	<b>Totals</b>			<b>\$2,857,887.28</b>
	<p>LEA #2 650 - New Hanover County Schools</p>			
	<b>Revenue</b>	<b>Approximate Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for Year 1</b>
	State Funds	\$5,419.01	70	\$379,330.70
Local Funds	\$2,662.00	70	\$186,340.00	
Federal EC Funds	\$4,464.16	7	\$31,249.12	
<b>Totals</b>			<b>\$596,919.82</b>	

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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>	\$2,494,042	\$3,339,018	\$4,173,772	\$4,730,275	\$5,008,527
<b>-Local Per Pupil Funds</b>	\$759,878	\$1,003,565	\$1,270,306	\$1,467,344	\$1,641,090
<b>-Exceptional Children Federal Funds</b>	\$200,887	\$273,207	\$348,338	\$402,469	\$434,894
<b>-Other Funds*</b>	\$58,005	\$78,000	\$97,500	\$110,500	\$117,000
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$3,512,812	\$4,693,790	\$5,889,916	\$6,710,588	\$7,201,511

**\*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.**

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### **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.*

<b>BUDGET EXPENDITURE PROJECTIONS Personnel</b>	<b>Year 1</b>			<b>Year 2</b>			<b>Year 3</b>			<b>Year 4</b>			<b>Year 5</b>		
	<i>Num Staff</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>									
Administrative & Support Personnel:															
Lead Administrator	1	\$75,000	\$75,000	1	\$80,000	\$80,000	1	\$85,000	\$85,000	1	\$90,000	\$90,000	1	\$95,000	\$95,000
Assistant Administrator	1	\$50,000	\$50,000	1	\$52,500	\$52,500	1	\$55,000	\$55,000	2	\$57,500	\$115,000	2	\$60,000	\$120,000
Clerical	2	\$30,000	\$60,000	2	\$32,000	\$64,000	3	\$34,000	\$102,000	3	\$35,500	\$106,500	3	\$36,500	\$109,500
Custodians	1	\$30,000	\$30,000	1	\$31,500	\$31,500	1.5	\$33,000	\$49,500	1.5	\$34,000	\$51,000	2	\$36,500	\$73,000
Transportation Staff	2	\$14,000	\$28,000	3	\$15,000	\$45,000	4	\$15,500	\$62,000	4	\$16,000	\$64,000	4	\$16,500	\$66,000
Guidance Counselor	1	\$40,000	\$40,000	1	\$42,000	\$42,000	1	\$43,500	\$43,500	1	\$45,000	\$45,000	1	\$46,500	\$46,500
Instructional Coach	1	\$50,000	\$50,000	1	\$52,500	\$52,500	2	\$54,000	\$108,000	2	\$55,500	\$111,000	2	\$57,000	\$114,000
<b>A - Total Admin and Support:</b>	9		\$333,000	10		\$367,500	13.5		\$505,000	14.5		\$582,500	15		\$624,000
Instructional Personnel:															
Core Content Teacher(s)	18	\$41,370	\$744,660	24	\$43,400	\$1,041,600	30	\$45,000	\$1,350,000	34	\$47,000	\$1,598,000	36	\$49,000	\$1,764,000
Electives/Specialty Teacher(s)	3	\$41,370	\$124,110	5	\$43,400	\$217,000	6	\$45,000	\$270,000	7	\$47,000	\$329,000	7	\$49,000	\$343,000
Exceptional Children Teacher(s)	2	\$43,000	\$86,000	3	\$45,000	\$135,000	4	\$47,000	\$188,000	5	\$49,000	\$245,000	6	\$51,000	\$306,000
Instructional Support	1	\$50,000	\$50,000	1	\$52,000	\$52,000	2	\$54,000	\$108,000	2	\$55,000	\$110,000	2	\$56,500	\$113,000
Teacher Assistants	9	\$25,000	\$225,000	10	\$26,000	\$260,000	11	\$27,000	\$297,000	12	\$27,000	\$324,000	12	\$28,000	\$336,000
<b>B - Total Instructional</b>	33		\$1,229,770	43		\$1,705,600	53		\$2,213,000	60		\$2,606,000	63		\$2,862,000

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	42		\$1,562,770	53		\$2,073,100	66.5		\$2,718,000	74.5		\$3,188,500	78		\$3,486,000
Administrative & Support Benefits															
Health Insurance	7	\$5,500	\$38,500	7	\$6,000	\$42,000	9	\$6,500	\$58,500	10	\$7,000	\$70,000	11	\$7,500	\$82,500
Retirement Plan--Other	7	\$1,500	\$10,500	7	\$1,600	\$11,200	9	\$1,750	\$15,750	10	\$1,850	\$18,500	11	\$1,950	\$21,450
Disability	9	\$350	\$3,150	10	\$348	\$3,480	13.5	\$357	\$4,820	14.5	\$351	\$5,090	16	\$378	\$6,048
Medicare	9	\$420	\$3,780	10	\$425	\$4,250	13.5	\$431	\$5,819	14.5	\$425	\$6,163	16	\$458	\$7,328
Social Security	9	\$1,763	\$15,867	10	\$1,801	\$18,010	13.5	\$1,844	\$24,894	14.5	\$1,818	\$26,361	16	\$1,957	\$31,312
D - Total Admin and Support Benefits:			\$71,797			\$78,940			\$109,782			\$126,113			\$148,638
Instructional Personnel Benefits:															
Health Insurance	33	\$5,500	\$181,500	43	\$6,000	\$258,000	53	\$6,500	\$344,500	60	\$7,000	\$420,000	63	\$7,500	\$472,500
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	33	\$1,500	\$49,500	43	\$1,600	\$68,800	53	\$1,750	\$92,750	60	\$1,850	\$111,000	63	\$1,950	\$122,850
Social Security	33	\$2,353	\$77,649	43	\$2,463	\$105,909	53	\$2,562	\$135,786	60	\$2,605	\$156,300	63	\$2,621	\$165,123
Disability	33	\$340	\$11,220	43	\$477	\$20,511	53	\$495	\$26,235	60	\$504	\$30,240	63	\$507	\$31,941
Medicare	33	\$420	\$13,860	43	\$576	\$24,768	53	\$599	\$31,747	60	\$609	\$36,540	63	\$612	\$38,556
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional Personnel Benefits:			\$333,729			\$477,988			\$631,018			\$754,080			\$830,970
D+E = F - Total Personnel Benefits			\$405,526			\$556,928			\$740,800			\$880,193			\$979,608
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	9		\$404,797	10		\$446,440	13.5		\$614,782	14.5		\$708,613	15		\$772,638
B+E = H - Total Instructional Personnel (Salary & Benefits)	33		\$1,563,499	43		\$2,183,588	53		\$2,844,018	60		\$3,360,080	63		\$3,692,970

TeamCFA: Pender - With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

G+H = J - TOTAL PERSONNEL	42		\$1,968,296	53		\$2,630,028	66.5		\$3,458,800	74.5		\$4,068,693	78		\$4,465,608
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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	\$10,000	\$12,000	\$14,000	\$15,000	\$16,000
	Paper	\$10,000	\$12,000	\$14,000	\$15,000	\$16,000
	Computers & Software	\$5,000	\$2,500	\$2,500	\$2,500	\$2,500
	Communications & Telephone	\$12,000	\$13,000	\$13,500	\$15,000	\$16,000
	Copier leases	\$10,000	\$12,000	\$12,500	\$13,000	\$13,500
Management Company	Contract Fees	\$350,000	\$469,000	\$588,000	\$671,000	\$720,000
Professional Contract	Legal Counsel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Facilities	Facility Lease/Mortgage	\$540,263	\$791,000	\$1,040,000	\$1,175,000	\$1,175,000
	Maintenance	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	Custodial Supplies	\$18,000	\$18,000	\$20,000	\$21,000	\$22,000
	Custodial Contract	\$48,000	\$56,000	\$64,000	\$68,000	\$72,000
	Insurance (pg19)	\$29,452	\$30,000	\$32,000	\$33,000	\$35,000
Utilities	Electric	\$48,000	\$54,000	\$56,000	\$58,000	\$60,000
	Gas	\$7,000	\$8,000	\$9,000	\$10,000	\$11,000
	Water/Sewer	\$4,500	\$5,000	\$5,500	\$6,000	\$6,500
	Trash	\$6,000	\$6,000	\$6,500	\$7,000	\$7,500
Transportation	Buses	\$45,000	\$20,000	\$25,000	\$30,000	\$20,000
	Gas	\$24,000	\$25,000	\$27,000	\$29,000	\$32,000
	Oil/Tires & Maintenance	\$20,000	\$15,000	\$15,000	\$20,000	\$20,000
Other	Marketing	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Child nutrition	\$60,700	\$81,000	\$101,000	\$114,750	\$121,500
	Travel	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Instructional Contract	Ec Services	\$30,000	\$40,000	\$45,000	\$45,000	\$55,000
	Fiscal Audit	\$0	\$12,000	\$12,000	\$14,000	\$14,000
	School Psychologist	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	K - TOTAL Administrative & Support Operations	\$1,320,915	\$1,724,500	\$2,145,500	\$2,405,250	\$2,478,500
	Instructional:					
Classroom Technology	Computers	\$45,000	\$30,000	\$15,000	\$15,000	\$15,000
	Instructional Technology	\$10,000	\$15,000	\$18,000	\$21,000	\$24,000
Instructional Contract	Staff Development	\$10,000	\$10,000	\$12,000	\$12,500	\$15,000
Books and Supplies	Instructional Materials	\$35,000	\$45,000	\$60,000	\$60,000	\$80,000

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	Curriculum/Texts	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
	Testing Supplies	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	L - TOTAL Instructional Operations	\$132,000	\$132,000	\$137,000	\$140,500	\$166,000
	K+L = M - TOTAL OPERATIONS	\$1,452,915	\$1,856,500	\$2,282,500	\$2,545,750	\$2,644,500

TeamCFA: Pender - With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

**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	\$1,968,296	\$2,630,028	\$3,458,800	\$4,068,693	\$4,465,608
M - TOTAL OPERATIONS	\$1,452,915	\$1,856,500	\$2,282,500	\$2,545,750	\$2,644,500
J+ M =N TOTAL EXPENDITURES	\$3,421,211	\$4,486,528	\$5,741,300	\$6,614,443	\$7,110,108
Z - TOTAL REVENUE	\$3,512,812	\$4,693,790	\$5,889,916	\$6,710,588	\$7,201,511
Z - N = SURPLUS / (DEFICIT)	\$91,601	\$207,262	\$148,616	\$96,145	\$91,403

**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.*

Year 1

Kindergarten through third grade: 3 classes each grade with 75 students total

Grades 4 through 6: 2 classes each with 50 students total

Total Students: 450

Year 2

Kindergarten: 4 classes with 25 students each (100 total)

First grade through fourth grade: 3 classes each grade with 75 students total

Fifth grade: 2 classes with 50 students total

Grade 6 and 7: 3 classes with 75 students total

Total Students: 600

Reasons for Demand:

SCHOOL CHOICE: Currently, there are no other public schools of choice in Pender County. Coastal Preparatory Academy: CFA is located approximately 15 miles away in New Hanover County. Almost half of its total population lives in and drives from from Pender County. The waitlist is over 50% of that's school capacity and the overall performance of Pender County district schools needs vast improvement.

CLASSICAL EDUCATION PLAN: Core Knowledge is a pre-K-8th grade curriculum that includes topics and subtopics in language arts, world history, American history, geography, visual arts, music, mathematics, and science. It is designed to promote equity in education by building a base of knowledge that is extensive in scope for all students.

POPULATION: With over 24,000 K-6 students in the two closest LEA's and surrounding charter schools, there would be a significant number (100:1 ratio) of elementary students available for our school for each seat we offer in our first year.

TeamCFA: Pender - With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

OPTIONS FOR CORE KNOWLEDGE ARE LIMITED: Besides Coastal Preparatory Academy, CFA, schools that offer the Core Knowledge Sequence don't exist. In addition, the TeamCFA pillars of success have proven to significantly impact the overall character and achievement of children.

GOVERNING BOARD: We will have an experienced Governing Board filled with community leaders, leadership team, and third party partnerships that will give us positional advantages to recruit and retain superior leadership to operate and sustain a successful charter school.

EXCELLENT MARKET LEADERSHIP: One of the most important characteristics in becoming and maintaining a quality school will be our market leadership. Our leadership will come in many forms, but the reputation that comes along with our branding is priceless.

PARTNERSHIPS: Our branding as a TeamCFA school will set high standards and in the community. This standard will include leading the community in providing quality, innovation, customer service, and student learning.

BREAK-EVEN POINT: This budget was developed based upon there being multiple revenue sources not present: EC RISK Pool and Special State Reserve, Title II, and any funds raised by the school.

2019-2020 Projected Number of Students: 450  
Projected Total Surplus after expenses: \$91,000  
Enrollment Required for Break-Even: 437 students (based on \$7,000 per student).

We have the option as late as 12/2019 to decrease cost and size of the facility. Open Enrollment period is tentatively set from 9/15/19-12/1/19.

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

TeamCFA: Pender will establish a contingency plan to meet unexpected shortfall to include:

- Learn from our sister schools in the TeamCFA network on the initial do's and don'ts to prevent initial shortfalls.
- Operate from a cash flow projection.
- Understanding year one charters do not typically meet enrollment (so budget respectively).
- If short enrollment, reduce personnel and slash organizational wants.
- Partner with credible vendors and foundations understanding of initial charter cash flow.

The school will not rely simply on fundraising activities. Our goal for start-up costs with the exception of permanent facility needs, instructional materials, supplies, and school furniture may be requested via grants for public charter schools. We will utilize surplus for furniture to reduce initial costs and focus on the bottom line to ensure the bulk of our funds flow directly to students.

*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*

The current budget does not rely on any outside revenue sources.

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

25:1

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

We will utilize the services of our CMO to address the following areas:

- Powerschool and Student Accounting
- Financial Services
- Cash Management
- Invoicing
- Payroll
- Audit Preparation
- Operations and School Management Oversight
- Teacher Recruiting, Hiring and Development
- Curriculum Support
- Leadership Development
- Governance support and development
- Marketing expertise
- Web Site Management

For any other services, we will rely on our partner, TeamCFA to properly vet potential service providers. The process may include a formed committee consisting of: Team CFA representatives, Head of School, and board members to seek and vet vendors. The committee or team will make a recommendation to the board for a vote Third party contracts will be evaluated annually to ensure a strong return on investment.

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

The budget aligns to our mission as almost 75% of our funding is going directly to benefit the school's academic programming, personnel, civic development, academic resources, and teacher development. We understand that being in a rural community we will need to budget toward our anticipated population to meet their need for transportation and lunch plans. Based on the county population and location of the school, we anticipate close to one-third of our population needing transportation to ensure their daily attendance. We are budgeting approximately \$120,000 to cover the costs of used buses, staffing, maintenance and gas to cover this cost in year one. This number was based off reading multiple public charter school budgets with transportation.

Facility: Based on our research, we plan on keeping facility costs within 15% of total revenue.

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

With our goal to utilize our partnerships and apply for grants focused on

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technology, civics, safety, and values based programming, we set a goal to have a \$500,000 reserve fund by year five. With this in mind, we will need to save \$100,000 per year. The budget projects us meeting this goal. If we do not meet this goal, we will adjust the next year's budget to cover the funding gap. This will be the responsibility of the Head of School and the finance committee to analyze spending (quarterly deep dives) to be sure we are on track to build our projected reserves.

We are meeting that annual \$100,000 goal in four of the five years based on the current budget that does not include any special state reserve, raised funds, or grants.

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

The budget, constructed conservatively, reflects the outright purchase of most of the capital type items needed by the school. In "Office Equipment & Lease," we include leasing a printer/copier/scanner/fax machine.

Many of these capital purchases may be provided by loaned funds through the CMO partnership, the remaining needs could be leased.

Also, we have not shown any E-rate reimbursement as a reduction in these costs. We plan to purchase a blend of new and used furniture and fixtures and will attempt to avoid leasing or financing.

Facility leasing is based upon 450 students at 75 square feet/student or approximately 45,000 square feet for Phase I (first two years). We will hire a developer to build and finance a facility.

*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*

We will solicit donations of goods and services upon receipt of acceptance of our application and grants. TeamCFA will provide financial support during the application and Ready to Open Process. They will provide marketing, website support, student recruitment support, and plan to hire and pay for the Head of School by December 2019.

North Carolina was just awarded the Charter School Program grant offered by the Department of Education, and we will plan to apply for this grant.

**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?*

The board (finance committee), CMO and school leadership will maintain a number of internal financial controls and bookkeeping practices that provides fiscal control and accounting procedures that are in accordance with Generally Accepted Accounting Principles.

The CMO will act as the finance and student accounting company providing oversight of the school's leadership team which consists of the Head of School and an Instructional Coach. They (CMO and Team) will provide timely and accurate information and reporting to the school's finance committee and board.

The Board will develop and approve a fiscal policy manual prior to the school's opening. The finance team will write specific processes based on these set policies which include (multiple check signers, clear guidelines on expenditure approval limits (i.e. over 5 k needs a vote), safeguarding of assets, high level criminal background checks for anyone with bank access, and invoice processing).

As a whole, the organization will maintain accurate records and limit risk to ensure diligence when it comes to public tax dollars and a clean audit.

The board will receive a monthly financial report that will consist of: -  
Income statement (revenue and expenses) with budget comparison.

-Bank statement.

-Enrollment report.

-Payment by vendor report.

-General ledger summary report with detail available.

-Internal controls will be reviewed and evaluated annually by an independent auditor in accordance with generally accepted audit standards.

We will develop an internal control checklist that includes the following questions:

-Are accounting records kept up-to-date and balanced monthly?

Is a standard chart of accounts with descriptive titles in use?

-For Monthly financial statements, are adequate and timely reports prepared to insure control of operations?

-When comparing actual results with budget, are personal expenses kept separate from business expenses? Are monthly bank reconciliations reviewed by Admin? Is there any separation of duties?

-Are governmental reporting requirements being complied with in a timely manner?

-Is insurance maintained and is this coverage reviewed periodically by a qualified individual?

-Is there adequate cash flow?

In addition, our financial experts on the board, in collaboration with TeamCFA and other charter schools, will develop systems for payroll, accounts receivable, donations and fundraisers, petty cash, and credit card usage. Our vendors and all third party contracts will be evaluated annually

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to ensure they we are receiving the best return on investment in addition to us being effective partners. They will provide any known or possible related party transactions (relationship, description of transaction and estimated dollars involved).

Secondly, our partnership with TeamCFA does not provide direct funding through grants. They may provide a credit to purchase devices and access to a system to utilize their marketing tools and web site. There is no direct funding exchanged.

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

There are no known possible 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.*

TeamCFA: Pender has selected Darrell L. Keller of Kings Mountain as the CPA who will conduct our annual audit. Mr. Keller's business address is 105 S City St, Kings Mountain, NC 28086, and his office phone number is (704) 739-0771. His fax number is (704) 739-6122.

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Again, without survey data, it's difficult to determine whether or not projections are realistic.	Danielle Allen	Budget Reven
"Both state and federal EC revenue is conservatively based upon 10% of total enrollment being scholars that need Exceptional Children services." Is 10% consistent with the SWD population of Pender County?	Austin Smigel	Total Budget
Why only one guidance counselor even when the school will approach 600 students?	Danielle Allen	Personnel Bu
Where is the EL/ESL teacher reflected in this? Average teacher salary in NC is approx. \$50K, how will Pender TeamCFA attract quality teachers if pay is low compared to neighboring schools? Also, if Pender TeamCFA does not provide health insurance coverage comparative to local schools, how will they attract quality teachers/staff? Will one counselor suffice in year 5?	Jonathan Bryant	Personnel Bu
Why is the facility lease mortgage going up at the rate shown each year? Why are a custodial contract and custodian both included in the budget? No IT director is listed in staff - what will Instructional Technology do for the school?	Jonathan Bryant	Operations B
Applicant needs to clarify: What is the estimated cost/budget line for Core Knowledge PD support and Instructional Materials?	Kristen Parker	Operations B
If the school is increasing in enrollment each year should the cost of your school psychologist also increase yearly?	Austin Smigel	Operations B
How will Pender TeamCFA educate about Core Knowledge - especially since this is not currently seen in Pender Co? A buffer of 13 students (437 v 450) does not allow for much potential contingency if enrollment is not was is predicted - especially since application states "year one charters do not typically meet enrollment." Cannot say that this plan is realistic based on the information in the application. "Close to 1/3 of students needing transportation" appears to contradict the transportation section of the application. How will two buses transport approx. 150 students in the first year?	Jonathan Bryant	Budget Narra
Breakeven projection is fairly close to the projected enrollment of 450. When will the board make the decision to decrease the cost and size of the facility, if that's necessary? What other cuts is the board prepared to make in year 1, should enrollment not reach targeted projections?	Danielle Allen	Budget Narra
Please clarify how the school has budgeted and planned for goal student enrollment not being met in year 1.	Jessica Kelly	Budget Narra
The org chart showed the CMO answering to the Head of School, and the Head of School reporting to the board. How will this work, if the CMO is going to act as the finance/student accounting company providing oversight of the school's leadership team?	Danielle Allen	Financial Au

<b>Reviewer</b>	<b>Score</b>
Jonathan Bryant	Pass
Joe Maimone	
Jessica Kelly	Pass
Danielle Allen	Pass
Bruce Friend	
Austin Smigel	Pass
Alex Quigley	
Jonathan Bryant	
Tammi Sutton	
Stephenie Clark	
Sherry Reeves	
Robert McQuat	
Phyllis Gibbs	
Kristen Parker	Pass
Lindalyn Kakadelis	

**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).*

katy\_ridnouer

Date: 10/01/2018

**Applicant Signature:**

The foregoing application is submitted on behalf of TeamCFA: Pender (*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: katy\_ridnouer

Board Position: Consultant

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

Date: 10/01/2018

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

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\_\_\_\_\_  
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**

<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> Applicant needs to clarify: What is meant by "American Values?" - kzparker718</p> <p><u>Mission Statement</u> Please clarify American Values in mission statement. - jessicak6411</p> <p><u>Mission Statement</u> What is the school's definition on "American Values?" Is there evidence that these values benefit students? - jonathan_bryant</p> <p><u>Mission Statement</u> Mission statement needs clarification. What "American values" is the mission statement referencing? - danielle_allen</p> <p><u>Educational Need and Targeted Student Population</u> Applicant needs to clarify: Aside from the curriculum, how will the school differ from the current LEA?</p> <p>Applicant needs to clarify: Aside from there not being any charter schools, what other rationale and data is there to support a need for a charter school?</p> <p>Applicant needs to clarify: The application names a specific area- but who are the targeted students you are hoping to enroll in the school? - kzparker718</p> <p><u>Educational Need and Targeted Student Population</u> It appears that justification is based largely on Coastal Preparatory Academy's success in enrolling students. What are their academic outcomes? - austin_smigel</p> <p><u>Educational Need and Targeted Student Population</u> Is there not being another charter school the main reason for opening this school? Please clarify. - jessicak6411</p> <p><u>Educational Need and Targeted Student Population</u></p>
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	<p>How many students are in Pender Co - 500? Was there any survey offered to prospective families? Need appears to be based on wait list data from other schools - which can be insufficient rationale. Is the only difference between Pender TeamCFA and the local schools curricular? - jonathan_bryant</p> <p><u>Educational Need and Targeted Student Population</u> Approximately 52% of students in Pender County Schools and 56% of students in New Hanover County Schools are FRPL eligible. More than half receive Title I services. Has the board considered this in their assertion that they will "seek an enrollment of a student body that closely mirrors that of Pender County"?</p> <p>Of the 16 public schools in Pender County, 14 have grades of A, B, or C. Only 1 school received a D, and one school received an F. The application says nothing about targeting students in these lower performing schools, so what is truly the board's rationale for a charter school in Pender County, aside from the fact that they don't currently have one?</p> <p>Does applicant have survey data indicating parent interest? Or are they solely relying on waitlist information?</p> <p>Coastal Prep: CFA had a growth index of -11 points last year. What evidence does the board have that the CFA model will be successful with their targeted student population? - danielle_allen</p> <p><u>Purposes of Proposed Charter School</u> Please clarify how these are new professional opportunities.</p> <p>Please clarify what data will be used to ensure improved student learning is taking place. - jessicak6411</p> <p><u>Purposes of Proposed Charter School</u> Where do "American Values" tie in to these purposes? - jonathan_bryant</p> <p><u>Purposes of Proposed Charter School</u> What room will teachers have within the CFA educational model (Core Knowledge, CKLA, Singapore Math, etc.) to be responsible for the learning program at the school site? If it's the ability to individualize instruction, how is that a "new professional opportunity"?</p> <p>Mission explicitly states a commitment to "American values." Where is that evidenced in these proposed purposes?</p> <p>Students in Pender County are generally performing well (of the 16 schools, 14 have grades of C or above). What evidence does CFA/the board have that their educational program will bring even greater gains for the students of Pender County, especially given that the nearest CFA school (Coastal Prep) is low-performing? - danielle_allen</p> <p><u>Goals for the Proposed Charter School</u> Applicant needs to clarify: How realistic is it to say that the NC report card will be no lower than a B? How can this comparison be made without knowing where students are at the start?</p> <p>Applicant needs to clarify: How will the school assess alignment/goals of reaching "American Values" as outlined in the mission statement? - kzparker718</p>
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	<p><u>Goals for the Proposed Charter School</u>          What are the academic outcomes of Coastal Preparatory Academy who has been used as an example of this school's proposed success? Is it reasonable to assume that no school grade level below a "B" is achievable when Pender County Schools range in school grades from D to A with an overall county performance of 87.5% as C or D schools? - austin_smigel</p> <p><u>Goals for the Proposed Charter School</u>          Please clarify NC Report Card...it states that the school will never get a grade lower than a B. Does this include in year one without knowledge of where students are? Was there additional research conducted to reach this goal? - jessicak6411</p> <p><u>Goals for the Proposed Charter School</u>          "A five year vision to be the highest performing public school of choice in Pender Co" is not particularly lofty, especially since the applicant states that there are not any current schools of choice in Pender Co.          Do not see any tie in to "American Values" with regard to goals. How will this be measured?          will Pender TeamCFA establish initial baselines for student achievement, or simply tie achievement to the numbers in this section without first knowing the student body? - jonathan_bryant</p> <p><u>Goals for the Proposed Charter School</u>          Is the goal of earning a B each year ambitious, given that half of the schools in Pender County have an A or B (and the board has not stated that they are targeting students in the two lower performing schools in the county)? Will this model truly improve student outcomes (especially given the success of the model at Coastal Prep)?           Section does not in any way address how the board will know that the school is helping to instill American values, although this was a core part of the mission statement.          - danielle_allen</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u>          Applicant needs to clarify: What primary assessment strategies will be utilized?</p> <p>Applicant needs to clarify: Will you be using the Core Curriculum from CoreKnowledge? Or just the sequence provided? If not using the curriculum, what expectations are there around HOW teachers create the materials? How will you ensure that the materials created are in line with the depth of the current NC standards?</p> <p>Applicant needs to clarify: According to curriculum reviews, CKLA is strong in the skill strand at many grade levels but there are opportunities to go deeper in alignment to the standards for the ELA portion- how will the school plan to identify and strengthen the curriculum in these areas?(If using the curriculum.) - kzparker718</p> <p><u>Instructional Program</u>          The instructional calendar lists 7 workdays prior to the first day of school which includes professional development and working in classrooms. Is this enough time for teachers to learn Core Knowledge, Singapore Math, and Core Virtues in depth enough? Please clarify if there will be additional professional development throughout the year. - jessicak6411</p> <p><u>Instructional Program</u>          Assessment strategies? - jonathan_bryant</p>

<p><u>Instructional Program</u> Core Knowledge builds from year to year. Applicant proposes to open with students in grades K-6, potentially having students in 6 grade levels with no exposure to the Core Knowledge curriculum (with students in grades 3-6 having several years of exposure to a different curriculum). What interventions or supports will the school provide to help these students get acclimated?</p> <p>How does character education raise student academic performance?</p> <p>If the school is using a three-year, in-depth PD series to teach teachers to become "true collaborators and creators of content rich units", what will happen in the first three years before teachers have that in-depth knowledge? How will they be expected to teach the CK content with fidelity? - danielle_allen</p> <p><u>Curriculum and Instructional Design</u> Applicant needs to clarify: What support/what focus will there be on the Singapore Math curriculum? The narrative details the Core Knowledge Sequence but what about Singapore Math? - kzparker718</p> <p><u>Curriculum and Instructional Design</u> What evidence does the applicant have that Core Knowledge has been shown to be effective for "all scholars"? Can CFA provide examples of CFA schools with significant percentages of low-income students and students of color that are outperforming their LEA (both subgroup proficiency and overall)? - danielle_allen</p> <p><u>Special Programs and "At-Risk" Students</u> Will Pender TeamCFA hire an EL coordinator or will this duty fall to other staff? Who will be responsible for EL PD? - jonathan_bryant</p> <p><u>Special Programs and "At-Risk" Students</u> Does the board acknowledge that some students legitimately have additional challenges that increases their risk of being underserved? How do they intend to meet the needs of these students, who will likely have very different needs from their more affluent, privileged peers? Moreover, given that many of the students enrolling at this proposed school will have no prior exposure to Core Knowledge, that may add an additional layer of interventions that are needed. - danielle_allen</p> <p><u>Exceptional Children – Identification and Records</u> How will the school ensure the confidentiality and safekeeping of student records that are released to staff members? Where will these files be kept while they are "checked out"? - danielle_allen</p> <p><u>Exceptional Children – Education Programming</u> What are the components of the full range of service delivery placement? How will your school provide the full continuum across grade levels? - robert_mcouat1</p> <p><u>Exceptional Children – Education Programming</u> Why will the school contract with Gaston Co personnel? Not sure how an Officer Friendly Program and SRO grant application ties into IEP/504 needs. - jonathan_bryant</p> <p><u>Student Performance Standards</u> Please clarify if MAP will be the only tool used throughout the year to determine at risk students. - jessicak6411</p>
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	<p><u>Student Performance Standards</u>          Every Pender County school except one either met or exceeded growth in 2017-18. How is "meeting or exceeding growth" an ambitious goal?</p> <p>What is the current proficiency of schools nearest the proposed location? Without this information, it's difficult to tell whether exceeding proficiency by 20 points is reasonable, feasible, or ambitious.</p> <p>Will the "at risk" determination rely solely on NWEA performance? Following the logic in the previous section that all students are at-risk of falling behind academically, will all students be given individualized goals/promotion plans?</p> <p>What types of evidence will be used to determine a scholar's likelihood of being retained?          - danielle_allen</p> <p><u>Student Conduct and Discipline</u>          Who will administer discipline (who will assign suspension, for instance) at Pender TeamCFA? - jonathan_bryant</p>
<p><b>Governance and Capacity</b></p>	<p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Applicant needs to clarify: What is the recruitment plan for recruiting more board members? - kzparker718</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Is the school planning on adding a nepotism policy to its bylaws? - austin_smigel</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          Clarification needed on how additional board members will be recruited.</p> <p>There are several committees listed and only 5 board members listed. Additional board members will be needed in order for this method to be effective. - jessicak6411</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u>          CPC?          Mr. Benson's responses to the Board questionnaire do not align to the school's application (school mission, evaluation of the success of the school, etc).          Have background checks been performed for current board members? - jonathan_bryant</p> <p><u>Proposed Management Organization (EMO/CMO)</u>          "Team CFA is located in our county" - not sure of this reference as the application states that there is not a charter presence in Pender Co. Also unclear why Stanley ("rural community like Stanley") is mentioned in this section. - jonathan_bryant</p> <p><u>Proposed Management Organization (EMO/CMO)</u>          Aristotle's Head of School is not listed as a member of this governing board (but she is on the board of CFA CPC). Was this section "borrowed" from the CFA CPC application?</p> <p>Applicant describes the performance of the highest and lowest performing schools - what is the performance of most CFA schools? The application explicitly mentions targeting students on the waitlist at Coastal Prep, but does not discuss the academic performance of that school. Why is that?</p> <p>Do any of the board members have experience overseeing a management organization and holding them accountable? What evidence does the board have that they will be able to</p>

<p>hold CFA accountable? - danielle_allen</p> <p><u>Staffing Plans, Hiring, and Management</u> ELL teacher not listed yet was part of your at-risk plan. Please clarify.  - jessicak6411</p> <p><u>Staffing Plans, Hiring, and Management</u> How will Pender TeamCFA ensure that TAs will have teacher certification or working toward this - especially with regard to the current state of teacher availability in NC? Will pay of TAs encourage this (higher than normal TA pay)? What percentage of health insurance will Pender TeamCFA pay? For hiring/firing - is the Board's role to simply be a rubber stamp, or will they go through a process of evaluation/approval? If so, what does this process look like? May want to check whether counselor is allowed to serve as testing coordinator - per NC statute. - jonathan_bryant</p> <p><u>Staffing Plans, Hiring, and Management</u> What theories will be debunked in the hiring process? How will the formal interview be used to do this? - danielle_allen</p> <p><u>Staff Evaluation and Professional Development</u> Applicant needs to clarify: How will teachers be evaluated on other curriculum? Core Knowledge is outlined in the narrative but no other curricula is mentioned. - kzparker718</p> <p><u>Staff Evaluation and Professional Development</u> Where is training accounted for in the budget? - austin_smigel</p> <p><u>Staff Evaluation and Professional Development</u> How will Singapore Math and Core Virtues implementation be evaluated? Please clarify. - jessicak6411</p> <p><u>Staff Evaluation and Professional Development</u> Will staff be compensated for PD they attend during the summer, or will this be built into their contract? - jonathan_bryant</p> <p><u>Marketing Plan</u> Is \$5,000 enough to market in Pender County to have an anticipated 1st year opening of 450 students? - austin_smigel</p> <p><u>Marketing Plan</u> Is the marketing plan represented properly in the budget? - jessicak6411</p> <p><u>Admissions Policy</u> How will parents whose student(s) is on the waiting list and now being offered a seat be notified? Is one business day a reasonable amount of time to expect them to make a decision? - danielle_allen</p> <p><u>Projected Student Enrollment (Table)</u> Unsure if these projections are realistic, especially since it does not appear that a community survey was given. - jonathan_bryant</p> <p><u>Projected Student Enrollment (Table)</u> What evidence does the school have (outside of waitlists from other schools) that parents in Pender/New Hanover counties are desirous of this school? Why has no survey data</p>
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	<p>been presented? - danielle_allen</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u>  Applicant needs to clarify: With an expected student population of over 900 students in year 5- will two buses be enough?</p> <p>Applicant needs to clarify: What evidence is there to support-"we expect the majority of children to arrive by car." - kzparker718</p> <p><u>Transportation Plan</u>  Please clarify how it was decided that two buses would be sufficient when year 1 student enrollment is projected to be 450 students? Has research been conducted to determine the number of students who will need transportation? - jessicak6411</p> <p><u>Transportation Plan</u>  "Qualify for transportation" - not all students will have access to transportation, if needed? What data supports that "the majority of children will arrive by car?" Will two busses suffice for the initial year? Pender is a large county (5th largest by land area). - jonathan_bryant</p> <p><u>Transportation Plan</u>  Rationale that Coastal Prep has 630 students and does not provide transportation (to support the transportation plan for CFA Pender) is concerning. Coastal Prep is predominantly white and affluent, and the decision not to offer transportation may hinder a more diverse student body from attending. Is this the target student population of CFA Pender? Keep in mind that 9 of Pender County's 16 schools currently receive Title I services.</p> <p>How will school determine whether a student needs transportation?</p> <p>Short term plans are helpful, but what is the process for finding students a longer term solution to transportation? - danielle_allen</p> <p><u>School Lunch Plan</u>  Applicant needs to clarify: Further information about the -"small food pantry" needs to be provided.</p> <p>Applicant needs to clarify: Who is the catering service? Has there been contacts made and estimates for cost? - kzparker718</p> <p><u>School Lunch Plan</u>  What will be the cost of the catered lunch program? What percentage of students does the school anticipate will need lunch provided? Are there any plans to provide breakfast for students who qualify for FRPL? How was the \$60,700 budget for lunch services determined? Using the estimate of 115 students requiring transportation, a budget of \$60,700 divided by 180 school days = \$337 per day, divided by 115 students = \$2.93 per lunch. Will that cover the cost of lunch from the catered lunch service?</p> <p>What types of foods will be stored in the food pantry? How will the school know which students forgot to bring lunch on any given day? - danielle_allen</p> <p><u>Healthy and Safety Requirements</u>  Katy Ridnouer is not the Board Chair listed in the Governance section. - jonathan_bryant</p> <p><u>Facility and Facility Contingency Plan</u></p>

	<p>Contingency plan lacks detail. - jonathan_bryant</p> <p><u>Facility and Facility Contingency Plan</u> Contingency plan lacks detail. Is there nothing in place at this point? - danielle_allen</p>
<p><b>Financial Plan</b></p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Again, without survey data, it's difficult to determine whether or not projections are realistic. - danielle_allen</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> "Both state and federal EC revenue is conservatively based upon 10% of total enrollment being scholars that need Exceptional Children services." Is 10% consistent with the SWD population of Pender County? - austin_smigel</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Where is the EL/ESL teacher reflected in this? Average teacher salary in NC is approx. \$50K, how will Pender TeamCFA attract quality teachers if pay is low compared to neighboring schools? Also, if Pender TeamCFA does not provide health insurance coverage comparative to local schools, how will they attract quality teachers/staff? Will one counselor suffice in year 5? - jonathan_bryant</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Why only one guidance counselor even when the school will approach 600 students? - danielle_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Applicant needs to clarify: What is the estimated cost/budget line for Core Knowledge PD support and Instructional Materials? - kzparker718</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> If the school is increasing in enrollment each year should the cost of your school psychologist also increase yearly? - austin_smigel</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Why is the facility lease mortgage going up at the rate shown each year? Why are a custodial contract and custodian both included in the budget? No IT director is listed in staff - what will Instructional Technology do for the school? - jonathan_bryant</p> <p><u>Budget Narrative</u> Please clarify how the school has budgeted and planned for goal student enrollment not being met in year 1. - jessicak6411</p> <p><u>Budget Narrative</u> How will Pender TeamCFA educate about Core Knowledge - especially since this is not currently seen in Pender Co? A buffer of 13 students (437 v 450) does not allow for much potential contingency if enrollment is not was is predicted - especially since application states "year one charters do not typically meet enrollment." Cannot say that this plan is realistic based on the information in the application. "Close to 1/3 of students needing transportation" appears to contradict the transportation section of the application. How will two buses transport approx. 150 students in the first year? - jonathan_bryant</p> <p><u>Budget Narrative</u> Breakeven projection is fairly close to the projected enrollment of 450. When will the board make the decision to decrease the cost and size of the facility, if that's necessary? What other cuts is the board prepared to make in year 1, should enrollment not reach</p>

	<p>targeted projections? - danielle_allen</p> <p><u>Financial Audits</u> The org chart showed the CMO answering to the Head of School, and the Head of School reporting to the board. How will this work, if the CMO is going to act as the finance/student accounting company providing oversight of the school's leadership team? - danielle_allen</p>
<b>OVERALL</b>	<p><u>Grade Levels Served and Total Student Enrollment:</u> Applicant needs to clarify: What evidence is there to support interest among the community? 900 students is a lot at the end of year 5. - kzparker718</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Were any surveys/local perspective parent meeting held? What is the rationale, other than the enrollment of another school, to justify the scope and size of the school and its growth? - austin_smigel</p>

<b><u>Charter School Advisory Board Subcommittee</u></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><u>Overall Summary</u></b>	
<b>Initial Screening</b>	<p>The Office of Charter Schools deemed this application incomplete on October 5, 2018. The following is needed for application evaluation:</p> <p>Appendix F: Background checks not submitted for any board members Appendix N: 2017 990 not submitted</p> <p>Applicant responded to the incomplete information request by the October 12, 2018 deadline.</p>
<b>Application</b>	

TeamCFA: Pender - With a focus on American Values, TeamCFA: Pender engages students in inquiry-based learning in order to provide them with life long learning skills necessary to prepare them for future education and work.

<b>Review</b>	
<b>Application Interview</b>	
<b>OVERALL</b>	