Planning Year Session V: My School Opens in Seven Months! Now What?

Office of Charter Schools
January 25, 2023
Office of Charter Schools

OCS Mission: The NC Office of Charter Schools exists to sustain the success of quality charter schools through Operations, Compliance, and Support.

OCS Core Values: Integrity, Teamwork & Collaboration, Diversity, Excellence, and Accountability.

• Director
  Dave Machado
• Stakeholder Support
  Dr. Shaunda Cooper
• Performance Framework
  Joseph L. Maimone
• Applications
  Melanie Rackley
• Risk & Compliance
  Ashley Baquero
• Amendments
  Ashley Baquero
• RTO & Planning Year & Renewals
  Claire Porter
• Professional Learning
  Dr. Darian Jones
• Administrative Support
  Anita Holbrook
• NC ACCESS
  Jay Whalen
• NC ACESSS
  Dr. Barbara O’Neal
• NC ACCES
  Lakisha Robbins
• NC ACCESS
  Davida Robinson
OCS Planning Year
Session V: My School Opens in 7 Months! Now What?

New Charter Leaders Institute, June 7-8, 2023
School leader and one BOD member shall attend. Location TBD.

Agenda for Planning Year Session V

Housekeeping & Attendance
<table>
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<tr>
<th>Time</th>
<th>Session Name</th>
<th>Notes</th>
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<td>Leading Mission-Based Purposeful Meetings</td>
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<td>Read to Achieve</td>
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<td>10:15 AM</td>
<td>Break</td>
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<td>Home Base</td>
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<td>Lunch</td>
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<td>12:30 PM</td>
<td>Keeping Up with the Evolving Charter Landscape</td>
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<td>Ashley Baquero</td>
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<td>1:30 PM</td>
<td>Expert on the Ground</td>
<td>What's Your Why?</td>
<td>Joanne Woodard (Sallie B. Howard)</td>
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<td>2:15 PM</td>
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<td>Students, Performance, and Finances</td>
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<td>Work Time + RTO Wrap Up</td>
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<td>Natasha Norins</td>
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Teacher Licensure Updates

Detrius T. Jones, RALC Director
Melanie Rackley, Education Planning and Development Consultant
January 2023

North Carolina Regional Assistance Licensing Centers
Catawba | Charlotte | Fayetteville | Nash
Objectives

- Charter School Requirements for Licensed Teachers/Educators
- Best Practices
- Transcript Review
- Routes to Licensure
  - In-state Program Completers
  - Out of State Program Completers
- Alternative Licenses
  - Permit to Teach
  - Emergency License
  - Residency License
  - Provisional for Student Services/Asst. Principal
  - CTE - Career & Technical Education
- Online Licensure System
  - Administrator Access
  - LEA Main Menu
  - Affiliation

- Sample License
- Training Resources
- Questions
- Additional Resources
- Definitions (we won’t go over these but they will have them in slides)
- Acronyms (we won’t go over these but they will have them in slides)
North Carolina General Statute

§ 115C-218.90. Employment requirements.
(a) Employees. –
(1) An employee of a charter school is not an employee of the local school administrative unit in which the charter school is located. The charter school's board of directors shall employ and contract with necessary teachers or contract with an education management organization or charter management organization to employ and provide teachers to perform the particular service for which they are employed in the school; at least fifty percent (50%) of these teachers shall hold teacher licenses. All teachers who are teaching in the core subject areas of mathematics, science, social studies, and language arts shall be college graduates.

(a) Purpose of Charter Schools. – The purpose of this Article is to authorize a system of charter schools to provide opportunities for teachers, parents, pupils, and community members to establish and maintain schools that operate independently of existing schools, as a method to accomplish all of the following:

1. Improve student learning;
2. Increase learning opportunities for all students, with special emphasis on expanded learning experiences for students who are identified as at risk of academic failure or academically gifted;
3. Encourage the use of different and innovative teaching methods;
4. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site;
5. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system; and
6. Hold the schools established under this Article accountable for meeting measurable student achievement results, and provide the schools with a method to change from rule-based to performance-based accountability systems.
Charter School Innovation

- **Attract Subject Matter Experts (SMEs)**
  - Entrepreneurship, STEM, aeronautical, visual arts, etc.

- **Recruitment & Retention**
  - Alternative pathways to licensure
    - Permit to Teach
    - Emergency License
    - Residency License
    - Provisional Student Services (School Counselor, Social Work, Asst. Principal)
    - Career and Technical (Trade & Industry, Health Science, Information Technology, etc.)

- **Workforce Enrichment**
  - Opportunity to develop PLCs with in-house industry experts and master educators.
  - Increased knowledge share among instructional staff leads to greater educational outcomes for students.
Licensure Best Practices

- Decide on licensure administrator?
  - Establish administrator access through NCDPI
  - Establish internal, *annual* licensure procedures/timelines to allow for extensions, renewals, add-ons, experience updates, etc.
  - Determine certification percentage “sweet spot” to allow for attrition.
Licensure Best Practices

- Establish onboarding processes
  - Require that all NC licensed educators affiliate their license with your charter school via NCDPI Online Licensure System.
  - Request that NC licensed educators provide their NCDPI licensure requirements letter that was generated at time of issuance. (applicable to IPL/SPI/BTs, Residency, and any provisional license holders).
  - Request out of state license holders to provide copies of certificates
    - There is no guarantee of 100% reciprocity.
    - Many career educators from other states are required to attempt and pass NC tests under a prescribed timeline.
  - Maintain personnel file with current copy of license, transcripts, test scores, professional development logs, plans of study, etc.
Licensure Best Practices

- **Transcripts** -
  - Official, degree dated
  - Degree in *English* is different than degree in *Secondary English Education*. Do you see student teaching? Do you see foundations courses? Do you see education courses?
  - Do they have a license from another state? Look for indicators on transcript.
  - Think **Dean of Education** NOT **Registrar** when verifying licensure. (See **NCDPI Form V**)

- **Best Practices** -
  - [Insert best practices related to licensure]

- **Transcripts** -
  - Official, degree dated
  - Degree in *English* is different than degree in *Secondary English Education*. Do you see student teaching? Do you see foundations courses? Do you see education courses?
  - Do they have a license from another state? Look for indicators on transcript.
  - Think **Dean of Education** NOT **Registrar** when verifying licensure. (See **NCDPI Form V**)

- **Best Practices** -
  - [Insert best practices related to licensure]
## The University of North Carolina at Chapel Hill

### Academic Program History

**Program:**
- **AS Bachelor of Arts**
  - Active in Program: 08/28/1984
  - College of Arts and Sciences
  - Undeclared Major

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**Total Credits:** 14.000

**GPA:** 3.740

**Cumulative GPA:** 3.740

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**Total GPA:** 3.690

**Total Credits:** 12.000

**GPA:** 3.690

**Cumulative GPA:** 3.690

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This transcript was processed and delivered by Credentiate TranscriptsNetwork.
**THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL**

Name: [Redacted]
Student ID: [Redacted]

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| Academic Standing Effective: 05/06/1966, Good Standing |

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**Academic Standing Effective: 05/06/1966, Good Standing**

**Term 1966 Spring**

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<td>PSTC</td>
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<tr>
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<td>452</td>
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<td>A</td>
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<td>24.0</td>
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<tr>
<td>EDUC</td>
<td>452</td>
<td>STUDENT TCH PRC IN TCH SKILLS</td>
<td>A</td>
<td>6</td>
<td>24.0</td>
</tr>
</tbody>
</table>

**Grading System**
- A, B, C, D (Passing)
- I (Incomplete)
- F (Failing)
- W (Withdrawal)

**Date of Graduation:**
- MAY

**Semester Hours for Degree:**
- Bachelor's
- Associate's

**Satisfactory Progress:**
- GRANTED
Educator licenses are issued to individuals who complete one of the following routes to earn a license:

- Approved education program or
- Alternative route program.

Individuals who have completed an approved teacher education program, including student teaching, can apply directly to DPI for their teaching licenses. This applies to individuals who completed their programs in NC or in another state.

Individuals who have not completed such a program must meet the qualifications for an alternative license outlined in SBE policy and be hired by an employing school system or charter school.

Alternative route programs include:

- Permit to Teach
- Emergency License
- Residency License
- CTE restricted provisional
- Provisional Student Services or Assistant Principal
Teacher Education Program Completers
In-State

- In-state Program Completers
  - Individuals who graduated from a NC Educator Preparation Program (EPP), including student teaching, and met all of the program requirements for a teaching license
  - Individuals initiate the application for a teaching license online. Once they upload their official degree dated transcripts and any other documents, answer the statement of applicant questions, and pay the processing fee the application is electronically routed to the EPP.
  - The EPP then electronically verifies completion of their program and eligibility for a NC teaching license. The application is routed to DPI pending review.
  - DPI will issue the initial 3 year license and send a licensure requirements letter to the email address the teachers put in the original application explaining what they need to do to convert the license to a 5 year continuing license.
Teacher Education Program Completers
Online Application Process

- **In-state program completers must provide the following information:**
  - **Transcripts:**
    - Contact the registrar's office of each college or university where you have earned a degree or completed coursework. Request official student transcripts to be sent to you. Then open any sealed envelopes, scan a copy and upload it with your online application.
  - **Test Scores:**
    - North Carolina State Board of Education approved test scores should be uploaded.
  - **Work Authorization:**
    - If you are not a US citizen, you are required to upload a copy of your work authorization documentation.
    - You are also required to have a valid US issued social security number.
  - **Experience Verification (optional):**
    - Verification of K-12 educator experience (Form E) needs to be downloaded, completed and signed by each former employer if you have prior K-12 teaching experience or instructional teaching assistant experience.
    - You should enter your verified experience dates into the online application.
    - Additionally, the completed Form E should be uploaded with your application.
  - **Pay the Nonrefundable Processing Fee**
Teacher Education Program Completers
Out-of-State

- Out-of-State Program Completers
  - These individuals have completed an approved teacher education program in another state or country. They hold another state’s full, unrestricted teaching license or are eligible for one.
  - Individuals initiate the application for a teaching license online. They will need to upload:
    - Official copy of their degree dated transcripts
    - Copy of their state’s teaching license and/or Verification by Institution: Completion of Approved Education Program (Form V)
      - Educators who completed a graduate level licensure program should provide a Form V completed by their college/university for it to be reflected on their NC license
    - Copy of any test scores completed to obtain their state’s teaching license
    - Form E completed by each employing school system documenting previous teaching experience (if applicable)
    - Evidence of effectiveness by providing evaluation data, including student growth (where applicable), from the State in which the valid and current license is held
Teacher Education Program Completers
Online Application Process

- **Out-of-state program completers must provide the following information:**
  - All Official Degree Dated Transcripts:
    - Request official student transcripts to be sent to you. Then open any sealed envelopes, scan a copy and upload it with your online application.
  - Verification Of Educational Program Completion (Form V):
    - Form V is required if you have completed a state approved educator preparation program at a regionally accredited college or university. Form V should be downloaded, completed and signed by the licensure officer or dean of education at that institution.
    - If there are areas on your license from another state for which you did not complete an approved educator program and you would like these areas to be considered for your North Carolina educator's license, please submit a copy of the out of state license and documentation of the basis for those areas being added.
    - NC DPI is not authorized to add areas to licenses based solely on out of state testing.
  - Teaching / Experience Verification when applicable:
    - Verification of K-12 educator experience (Form E) and/or post secondary experience (Form CE) needs to be downloaded, completed and signed by each former employer.
    - You should also enter your verified experience dates into the online application.
    - The completed Form E and/or Form CE must be uploaded with your application.
  - Passing Test Scores from the state where you completed your Ed. Prep Program(s)
  - Teaching Effectiveness - Copies of your evaluation documents including student growth data
# Alternative Licensure Routes

## Licensure Routes Fast Facts

<table>
<thead>
<tr>
<th></th>
<th>Permit to Teach (PtT)</th>
<th>Emergency License (EL)</th>
<th>Residency License (RL)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition</strong></td>
<td>One-year nonrenewable license. Previously known as Emergency Permit to Practice. Not eligible under any other route.</td>
<td>One-year nonrenewable license. Not an option for those who completed an Education Preparation Program.</td>
<td>Replaces Lateral Entry as the NC alternative license. One year, with option to renew twice, within no more than a 3-year period</td>
</tr>
<tr>
<td><strong>Qualifications</strong></td>
<td>Bachelor's Degree</td>
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<tr>
<td></td>
<td>Coursework or Testing</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Completion of NCSBE Pre-service Requirements (10 Day Training or ETT)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Additional Requirements</td>
<td>Lack of eligible candidate documentation</td>
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<tr>
<td><strong>Specifications</strong></td>
<td>Must be Requested by Employing School System</td>
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<td></td>
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<tr>
<td></td>
<td>License Level</td>
<td>A Level</td>
<td>A Level</td>
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<td></td>
<td>Paygrade</td>
<td>A-00</td>
<td>Experience &amp; Grad Pay</td>
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<tr>
<td></td>
<td>One-Year License</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Renewable?</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Conversion</td>
<td>Convert to RL or EL upon qualifying</td>
<td>Convert to RL upon qualifying</td>
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</table>
LICN - 001 1.80 Permit to Teach

Effective July 1, 2016, at the request of the employing PSU, NCDPI may issue a permit to teach for a teaching assignment at the A-00 pay level to persons who hold at least a baccalaureate degree but who do not qualify for a license under any other approach. The permit to teach shall be valid for one year and may not be renewed. When a PSU requests a permit to teach, the PSU must document that no appropriately licensed professionals or persons who are eligible for a residency license are available to accept the position.

NOTE: Once an individual holds a Residency License, the individual may not hold a Permit to Teach or an Emergency License.
LICN - 001 1.90 Emergency License

- Beginning with the 2017-2018 academic year, NCDPI may issue Emergency Licenses for a teaching assignment at the request of the PSU or charter school. The Emergency License is a one-year non-renewable license issued to an individual who:
  1. holds a baccalaureate degree with 18 hours of coursework relevant to the requested licensure area but has not completed a recognized educator preparation program, and;
  2. does not qualify for a Residency License.

- Applicants for an Emergency License shall meet all other requirements established by the NCSBE, including preservice training, prior to teaching.

NOTE: Once an individual holds a Residency License, the individual may not hold a Permit to Teach or an Emergency License.
 ROUTES TO LICENSURE - Residency License

LICN - 001 1.60 Residency License

- At the request of an employing school system, an individual, including those who hold the Permit to Teach or Emergency License, may qualify for a one-year Residency License in a teaching area, with the option to renew twice, within no longer than a three-year period from the initial effective date. Once an individual holds a Residency License, the individual may not hold a Permit to Teach or Emergency License. All requirements to convert a Residency License to either an IPL or CPL must be completed before the expiration of the second renewal of the Residency License. Individuals must meet all of the following requirements as stated in GS 115C-269.15:

1. holds, at a minimum, a baccalaureate degree; and;
2. has either completed 24 hours of coursework in the requested licensure area or passed the NCSBE required content area examination(s) for the requested licensure area, and;
3. is enrolled in a recognized Educator Preparation Program (EPP) with a minimum GPA of 2.7 (see exceptions for GPA requirement in TCED-009), and;
4. meets all other requirements established by the NCSBE, including completing preservice requirements prior to teaching.
Preservice Training Requirements Prior to Teaching

Teachers in the first year of their Residency License must receive 10 days of professional development from the PSU designed to support a successful classroom experience.

The required 10 days of professional development may be completed through one of the following options:

1. The PSU may choose to provide all 10 days during the preservice period, OR,

2. The PSU may provide five days of preservice training with a commitment to provide an additional five days of professional development throughout the teacher’s first year of Residency Licensure.
The 10-day training will include:

- an overview of the school’s/system’s goals, policies, and procedures;
- an overview of the State Board of Education’s Mission and Goals;
- a description of available services and professional development opportunities;
- the process for achieving a continuing license;
- the guidelines for optimal working conditions for all novice teachers;
- training on the North Carolina Educator Evaluation System;
- a review the NC Standard Course of Study including end-of-grade and end-of-course testing;
- a review of local curriculum guides;
- training in lesson planning
- assistance in classroom organization
- instruction on classroom management including positive management of student behavior, effective communication for defusing and deescalating disruptive or dangerous behavior, and safe and appropriate use of seclusion and restraint;
- an overview of the identification and education of children with disabilities

OR

- completion of North Carolina Effective Teacher Training upon issuance of a Residency License.
Online Licensure System Overview

- [https://vo.licensure.ncpublicschools.gov/](https://vo.licensure.ncpublicschools.gov/)
- DPI’s online licensure system is a one-stop shop for educators, school systems, and the general public to verify North Carolina educators’ licenses.
- All applications/requests for new licenses or actions on existing licenses must be made in the online licensure system.
For audit and security reasons, you will need to submit a formal request to Systems Accounting at DPI to gain administrator access to the online licensure system and to the Lic/Sal system.

The form and directions to where you can request access to both is located at the following link, [https://licsalweb.dpi.state.nc.us/](https://licsalweb.dpi.state.nc.us/).

Once you submit the form, the IT Department at DPI will create your login account and an email will automatically be generated and sent to you. Please allow 1 to 2 business days for the request to be processed.

**Important:** if you already have a personal account to view your individual teaching license on the online licensure system, please make sure you use another email address for your administrator account access.

**Suggestion:** use your personal, permanent email address for your individual, personal account and use your work email address for your administrator access account.
Public Schools of North Carolina
License/Salary

Request for DPI Application Access
(Use this form to request access to specific Web-based applications hosted by DPI)

1. Mark Requestor Type: ☐ LEA ☐ Charter School ☐ BHE ☐ Private Schools
2. Institution Name:  Click here to enter text.
3. LEA/Charter School Number:  Click here to enter text.
4. Site Security Officer Information:
   Name:  Click here to enter text.   Phone:  Click here to enter text.
   Email Address:  Click here to enter text.
5. Mark Appropriate Application(s): ☐ License Salary ☐ Licensure Online

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<th>First Name</th>
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Return to: systems_accounting@dpi.nc.gov

(DPI Staff Only)

Comments:
Once you have Administrator Access, you will begin using the sign-in screen to log in to access your administrator account for the school system.
You will use the Maintain Affiliation option to view and manage the affiliation of educators with your school system.

Individual educators can create an affiliation request which will appear in Pending status until you (as the administrator) confirm or deny the request.

You may use this screen to un-affiliate educators who are no longer employed with your school.
The front of the NC professional educator’s license provides:

- Dates pertinent to an individual’s eligibility for employment in NC public schools
- Codes and information indicating the areas in which an individual is eligible for employment
- The education level and established experience level for each licensure area.
Resources - Training

The RALC website [www.ralc.us](http://www.ralc.us) has short video tutorials for several application processes that can assist you or your educators in making online licensure requests.

- Go to the News & Resources tab
- Click on Resources
- Select NC Department of Public Instruction
  - Select NC DPI Online Licensure System Tutorials
  - Click on School System Tutorials

**Individualized, Detailed Licensure Training**

The RALC Director for your region is available to assist you with individualized licensure training. Just send an email to the RALC Director for your region.

- Contact information for the RALC Director in your region is located on the RALC website under the contact tab.
The RALC Director for your region is available to assist you with licensure questions and individual licensure training.

Please contact the RALC Director assigned to the region your school is located in by email.

Report current contact information of your Licensure staff to your designated RALC Director.

Catawba RALC
Karoline Fisher, Director
catawbaralc@gmail.com

Charlotte RALC
Virginia Gutierrez Cedeno, Director
charlotteralc@gmail.com

Nash RALC
Detrius T. Jones, Director
nashralc@gmail.com

Fayetteville RALC
Karen Chavis, Director
fayettievilleralc@gmail.com
HUMAN CAPITAL WEBINAR INFORMATION

- All webinars are held from 10:30-11:30 AM.
- For ALL webinar materials, use this link to access the Google folder: https://drive.google.com/drive/folders/14yXKMpUUcxJM4uk2v-ctsTsDjFNIcnX0?usp=sharing
- Reach out to Kim Evans (Kimberly.evans@dpi.nc.gov) with any questions
2023 HR WEBINAR DATES

February 3
March 3
April 10 (Monday)
May 5
June 2
July 10 (Monday)
August 7 (Monday)
September 8
October 6
November 3
December 8

Kim Evans’ Personal Room
https://ncgov.webex.com
/meet/kimberly.evans
619435814

Join by phone
+1-415-655-0003 US Toll
Access code: 619 435 814
Questions

Melanie Rackley

*Education Planning and Development Consultant*

*Office of Charter Schools*

[Melanie.Rackley@dpi.nc.gov](mailto:Melanie.Rackley@dpi.nc.gov)  (W) (984) 236-2712
**Additional Resources**

- NC DPI - [https://www.dpi.nc.gov/](https://www.dpi.nc.gov/)
- NC State Board of Education -
- Licensure - [https://www.dpi.nc.gov/educators/educators-licensure](https://www.dpi.nc.gov/educators/educators-licensure)
  - Online Licensure System - [https://vo.licensure.ncpublicschools.gov/](https://vo.licensure.ncpublicschools.gov/)
  - Limited Licenses - [Limited License Information](#)
  - IPL - [IPL Waiver Instructions/Forms](#)
  - Licensure Request Types Quick Guide
    - [https://ralc.us/resources/](https://ralc.us/resources/)
      - Click on NC Department of Public Instruction
      - Click on NC DPI Online Licensure System Tutorials
      - Click on pdf link to [Quick Reference Guide: Licensure Request Types](#)
- Educator Preparation Programs - [https://www.dpi.nc.gov/approved-programs](https://www.dpi.nc.gov/approved-programs)

- Testing Vendor Sites -
  - [http://www.nc.nesinc.com](http://www.nc.nesinc.com)
  - [http://www.ets.org/praxis/nc/requirements](http://www.ets.org/praxis/nc/requirements)
  - [http://www.languagetesting.com](http://www.languagetesting.com)
- RALC - [www.ralc.us](http://www.ralc.us)
Common definitions used throughout all State Board of Education (SBE) policy:

- **Professional Educator or Educator** - An administrator, teacher, or student services personnel.

- **Teacher** - An individual whose major responsibility is to either teach or directly supervise teaching, as classified by the North Carolina State Board of Education (NCSBE).

- **Student Services Personnel** - An individual providing specialized assistance to students, teachers, administrators, or the education program in general, as classified by the NCSBE. Student services personnel include, but are not limited to, individuals employed in school counseling, school social work, school psychology, audiology, speech-language pathology, and media coordination.

- **Administrator** - An administrator or supervisor who serves in general and program administrator roles, as classified by the NCSBE. Administrators include, but are not limited to, superintendents, assistant or associate superintendents, principals, assistant principals, or curriculum-instructional specialists.
## Education Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC’s</td>
<td>Until the end of the 2011-12 school year, the ABCs of Public Education was North Carolina’s comprehensive plan to improve public schools. Implemented in the 1996-97 school year, the model focused on schools meeting growth expectations for student achievement as well as on the overall percentage of students who scored at or above grade level. Schools received recognition based on student growth and the percentage of students’ scores at or above grade level.</td>
</tr>
<tr>
<td>ACRE</td>
<td>Accountability and Curriculum Revision Effort. This describes all of the work performed by the NCDPI to implement the recommendations contained in the State Board of Education’s “Framework for Change: The Next Generation of Assessments and Accountability” document. This document describes a new vision of the North Carolina Standard Course of Study, student testing, and district and school accountability.</td>
</tr>
<tr>
<td>ACT</td>
<td>American College Test. An assessment taken by students as a precursor to college/university admission.</td>
</tr>
<tr>
<td>ADA</td>
<td>Average Daily Attendance, total number of days of attendance for all students divided by the total number of school days in a given period.</td>
</tr>
<tr>
<td>ADM</td>
<td>Average Daily Membership. The number of days a student is in membership at a school divided by the number of days in a school month or school year.</td>
</tr>
<tr>
<td>AFR</td>
<td>Annual Financial Report, published as statistical data, includes per pupil spending.</td>
</tr>
<tr>
<td>AMO</td>
<td>Annual Measurable Objectives. AMO are proficiency targets set by student subgroup at the state level with the goal to reduce by half the percentage of students considered non-proficient in reading and mathematics within six years.</td>
</tr>
</tbody>
</table>
# Education Acronyms

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>AP</td>
<td>Advanced Placement. A program that enables high school students to complete college-level courses for college placement and/or credit.</td>
</tr>
<tr>
<td>AYP</td>
<td>Adequate Yearly Progress. A former measure under No Child Left Behind used by the state to gauge yearly progress of student subgroups toward meeting 100% proficiency in reading and mathematics. North Carolina received a waiver from the US Department of Education in 2012 to use AMO to gauge student progress toward meeting proficiency goals in reading and mathematics.</td>
</tr>
<tr>
<td>BOG3</td>
<td>Beginning of Grade 3. Test taken in English language arts/reading by third grade students starting on the 11th day of the school year and continuing through the 15th day.</td>
</tr>
<tr>
<td>BUD</td>
<td>Budget Utilization and Development, software package provided by DPI and used by LEAs to administer their budgets, also used by charter schools to enter federal budgets.</td>
</tr>
<tr>
<td>CECAS</td>
<td>Comprehensive Exceptional Children Accountability System. A secure web-based student information system for exceptional children that supports online case management, compliance monitoring, data analysis, and federal and state reporting requirements.</td>
</tr>
<tr>
<td>CEDARS</td>
<td>[NC] Common Education Data Analysis &amp; Reporting System. CEDARS is North Carolina’s PreK-13 State Longitudinal Data System. Once fully in place (July 2011), CEDARS will enable state, local and federal policymakers and service providers to make data-driven decisions based on analysis of trends and relationships between various educational factors and student performance over time.</td>
</tr>
</tbody>
</table>
## Education Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>COA</td>
<td>Uniform Chart of Accounts.</td>
</tr>
<tr>
<td>CTE</td>
<td>Career and Technical Education. CTE provides high school students the opportunity to take courses in eight program areas so that they can explore interests and careers while building and strengthening their career-specific knowledge and skills. The eight education program areas are: Agricultural; Business, Finance and Information Technology; Career Development; Family and Consumer Sciences; Health Science; Marketing and Entrepreneurship; Technology Engineering and Design; and Trade and Industrial.</td>
</tr>
<tr>
<td>Datafile</td>
<td>Generic term for UERS data files.</td>
</tr>
<tr>
<td>DSSF</td>
<td>Disadvantaged Student Supplemental Funding.</td>
</tr>
<tr>
<td>ECATS</td>
<td>Exceptional Children Accountability Tracking System. A secure web-based student information system for exceptional children that supports online case management, compliance monitoring, data analysis, and federal and state reporting requirements.</td>
</tr>
<tr>
<td>EDDIE</td>
<td>Educational Directory &amp; Demographical Information Exchange. EDDIE is the authoritative source for North Carolina public school information including LEA numbers, school numbers, administrative contacts, school types, grade levels, calendar types, program types and addresses. Information contained in EDDIE is populated by local districts and feeds multiple NCDPI systems including Accountability, NC WISE, and NC School Report Cards, and is used to meet federal reporting requirements. EDDIE replaced the School, Name and Address (SNA) file in April 2010.</td>
</tr>
<tr>
<td>edTPA</td>
<td>Performance-based, subject-specific assessment and support system used by teacher preparation programs throughout the United States to emphasize, measure and support the skills and knowledge that all teachers need from Day 1 in the classroom</td>
</tr>
</tbody>
</table>
# Education Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
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<tbody>
<tr>
<td><strong>EL</strong></td>
<td>An individual whose native language is a language other than English or who comes from an environment where a language other than English has had a significant impact on the individual's level of English language proficiency and who requires a specialized language support program to participate fully in the curriculum and state-wide assessment program.</td>
</tr>
<tr>
<td><strong>ELA</strong></td>
<td>English Language Arts. Part of the Common Core curriculum in the NC Standard Course of Study, ELA refers to reading, literature, reading, writing, speaking, and listening.</td>
</tr>
<tr>
<td><strong>ELL</strong></td>
<td>English Language Learner. Student whose first language is one other than English and who needs language assistance to participate fully in the regular curriculum.</td>
</tr>
<tr>
<td><strong>EOC</strong></td>
<td>End-of-Course tests designed to access the competencies defined by the Standard Course of Study for three mandated courses: Algebra I/Integrated I, English II and Biology. Tests are taken during the last two weeks of school for students on a traditional calendar and the last week of the course for students on a block schedule.</td>
</tr>
<tr>
<td><strong>EOG</strong></td>
<td>End-of-Grade tests in reading and mathematics (grades 3-8) and science (grades 5 and 8) that are taken by students during the last three weeks of the school year.</td>
</tr>
<tr>
<td><strong>EPP</strong></td>
<td>Educator Preparation Program</td>
</tr>
<tr>
<td><strong>ERaCA</strong></td>
<td>Expenditure Reimbursement and Cash Application. The web based system used to reimburse entities that are not LEAs or charter schools for expenditures incurred against federal grants.</td>
</tr>
</tbody>
</table>
## Education Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
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<tbody>
<tr>
<td><strong>ESEA</strong></td>
<td>Elementary and Secondary Education Act. This is the principal federal law affecting K-12 education with its longstanding commitment to equal opportunity for all students. The ESEA of 1965 was later amended and reauthorized by the No Child Left Behind (NCLB) Act of 2001. In December of 2015, the ESEA was again amended and reauthorized by the Every Student Succeeds Act (ESSA).</td>
</tr>
<tr>
<td><strong>ESL</strong></td>
<td>English as a Second Language. A program model that delivers specialized instruction to students who are learning English as a new language.</td>
</tr>
<tr>
<td><strong>ESSA</strong></td>
<td>Every Student Succeeds Act. This is the name of the latest reauthorization of the Elementary and Secondary Education Act of 1965. See ESEA above. The ESSA was signed into law in 2015 and requires each state to create a plan to meet the components of the law.</td>
</tr>
<tr>
<td><strong>EVAAS</strong></td>
<td>Education Value Added Assessment System. SAS® EVAAS™ for K-12 is a customized software system available to all NC school districts that provides diagnostic reports quickly to district and school staff. EVAAS tools provide a precise measurement of student progress over time and a reliable diagnosis of opportunities for growth that help to identify which students are at risk for under-achievement. By viewing easy-to-understand charts and graphs accessed via the Web, users can produce reports that predict student success, show the effects of instruction at particular schools, or reveal patterns in subgroup performance.</td>
</tr>
<tr>
<td><strong>FBS</strong></td>
<td>Financial and Business Services.</td>
</tr>
<tr>
<td><strong>FRL</strong></td>
<td>Free and Reduced Priced Lunch. Children qualify, based upon parent or guardian financial status, to receive either free or reduced priced lunch through a federal governmental program.</td>
</tr>
<tr>
<td><strong>FTE</strong></td>
<td>Full Time Equivalent.</td>
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<tr>
<td>GDVS</td>
<td>Graduate Data Verification System.</td>
</tr>
<tr>
<td>GETC</td>
<td>Governor’s Education Transformation Commission. The GETC was established in September 2010 to provide oversight and consultation on the use of state Race to the Top funds.</td>
</tr>
<tr>
<td>GRS</td>
<td>Grade, Race and Sex data collected from each school at the end of the first school month.</td>
</tr>
<tr>
<td>IAM</td>
<td>Identity and Access Management. An organization's framework to manage electronic or digital identities, including the profiles of people, systems, and services, as well as the use of emerging technologies to control access to the organization's resources.</td>
</tr>
<tr>
<td>IDEA</td>
<td>Individuals with Disabilities Education Act. This federal law, reauthorized in 2004, is designed to ensure that all children with disabilities have available to them a free and appropriate public education that emphasizes special education and related services designed to meet their unique needs and prepare them for further education, employment and independent living.</td>
</tr>
<tr>
<td>IEP</td>
<td>Individualized Education Program. The IEP is a written statement for a student with a disability that is developed, at least annually, by a team of professionals knowledgeable about the student and the parent. The plan describes the strengths of the child and the concerns of the parents for enhancing the education of their child, and when, where, and how often services will be provided. The IEP is required by federal law for all exceptional children and must include specific information about how the student will be served and what goals he or she should be meeting.</td>
</tr>
<tr>
<td>IHE</td>
<td>Institute of Higher Education. A college or university offering education beyond grade 12.</td>
</tr>
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<tr>
<td>IPT</td>
<td>IDEA Proficiency Test. Test used to determine the appropriate assessment for limited English proficient students.</td>
</tr>
<tr>
<td>IIS</td>
<td>Instructional Improvement System. The IIS provides portals for students, teachers, parents, and school and district administrators to access data and resources to inform decision-making related to instruction, assessment and students’ career and college goals.</td>
</tr>
<tr>
<td>LEA</td>
<td>Local Education Agency. Synonymous with a local school system or a local school district, indicating that a public board of education or other public authority maintains administrative control of the public schools in a city or county.</td>
</tr>
<tr>
<td>LEP</td>
<td>Limited English Proficient. In the ESEA, as amended by the ESSA, the term, 'English learner' replaces the term 'Limited English Proficient' used in section 9101 of the ESEA, as amended by the No Child Left Behind Act (NCLB).</td>
</tr>
<tr>
<td>LINQ</td>
<td>Benchmark payroll and accounts payable software provided to charter schools by DPI to meet UERS requirements.</td>
</tr>
<tr>
<td>LMS</td>
<td>Learning Management System. A software application that is used to administer, document, track, report and deliver educational courses or training programs.</td>
</tr>
<tr>
<td>LOR</td>
<td>Learner Object Repository. A storage site for digital content or &quot;digital library.&quot; An LOR lets educators share, manage and use educational resources.</td>
</tr>
<tr>
<td>Acronym</td>
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<tr>
<td>MCR</td>
<td>Math Course Rigor. MCR is the percent of students who take and pass the NC Math 3 course prior to graduation. It is a part of the school accountability model.</td>
</tr>
<tr>
<td>MFELs</td>
<td>Monitored former English Learners. Students who have excited English Learner (EL) status, but remain in the EL subgroup for four years after the year they exit EL status. MFELs are monitored at the school level to ensure continued adequate English proficiency.</td>
</tr>
<tr>
<td>MLD</td>
<td>Membership Last Day, the number of students remaining in membership as of the last day of the school month or academic year.</td>
</tr>
<tr>
<td>MSL</td>
<td>Measures of Student Learning. MSL, more often referred to as Common Exams, are assessments district administrators will use to measure student academic growth in subjects not currently assessed with state end-of-grade assessments, end-of-course assessments, or Career and Technical Education post assessments. The assessments’ results will not be used for school accountability purposes but instead as one component of teacher evaluations.</td>
</tr>
<tr>
<td>MTSS</td>
<td>Multi-tiered framework which promotes school improvement through engaging, research-based academic and behavioral practices. NC MTSS employs a systems approach using data-driven problem-solving to maximize growth for all.</td>
</tr>
<tr>
<td>NAEP</td>
<td>National Assessment of Educational Progress. Also known as the “Nation’s Report Card,” NAEP assesses the educational achievement of elementary and secondary students in various subject areas. It provides data for comparing the performance of students in North Carolina to that of their peers nationwide.</td>
</tr>
<tr>
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<tr>
<td>NBPTS</td>
<td>National Board for Professional Teaching Standards.</td>
</tr>
<tr>
<td>NCCLAS</td>
<td>The North Carolina Checklist of Academic Standards is an alternate assessment designed to measure grade-level competencies of students identified as limited English proficient and some students with disabilities.</td>
</tr>
<tr>
<td>NCDPI</td>
<td>North Carolina Department of Public Instruction. The NCDPI administers the policies adopted by the State Board of Education and offers instructional, financial, technological and personnel support to all public school systems in the state.</td>
</tr>
<tr>
<td>NCEES</td>
<td>The North Carolina Educator Evaluation System. A system used to evaluate the performance of all teachers, principals, assistant principals, instructional central office administrators and superintendents in order to promote effective leadership, quality teaching and student learning while enhancing professional practice that leads to improved instruction.</td>
</tr>
<tr>
<td>NCEXTEND1</td>
<td>The North Carolina EXTEND1 is an alternate assessment designed to measure the performance of students with significant cognitive disabilities using alternate achievement standards.</td>
</tr>
<tr>
<td>NCEXTEND2</td>
<td>The North Carolina EXTEND2 is an alternate assessment designed to measure grade-level competencies of students with disabilities using modified achievement standards in a simplified multiple choice format.</td>
</tr>
<tr>
<td>NCFEs</td>
<td>The North Carolina Final Exams. NCFEs are considered standardized artifacts reflective of student growth for participants in the teacher evaluation process.</td>
</tr>
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**Education Acronyms**
# Education Acronyms

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<tr>
<td><strong>NCID</strong></td>
<td>NCID is the standard identity management and access service provided to state, local, business and citizen users by the Office of Information Technology Services. <a href="https://ncid.nc.gov/">https://ncid.nc.gov/</a></td>
</tr>
<tr>
<td><strong>NCLB</strong></td>
<td>No Child Left Behind. NCLB is the 2002 reauthorization of the Elementary and Secondary Education Act of 1965 and represents a sweeping change in the federal government's role in local public education. NCLB’s primary goal is for all public school children to be proficient or above in reading and mathematics by 2013-14. Title I schools that do not meet certain student achievement standards face sanctions under this law.</td>
</tr>
<tr>
<td><strong>NCVPS</strong></td>
<td>North Carolina Virtual Public School. <a href="http://www.ncvps.org/">www.ncvps.org/</a></td>
</tr>
<tr>
<td><strong>NC WISE</strong></td>
<td>North Carolina Window of Information for Student Education. This secure web-based tool provides educators with direct and immediate access to a full spectrum of data on a student’s entire career in the North Carolina public school system.</td>
</tr>
<tr>
<td><strong>NWEA</strong></td>
<td>Northwest Education Association. The association offers a formative assessment item bank that contains more than 70,000 standards-based items for mathematics, English Language Arts, science and social studies, all aligned to the appropriate standards in all 50 states.</td>
</tr>
<tr>
<td><strong>OCS</strong></td>
<td>Office of Charter Schools.</td>
</tr>
<tr>
<td><strong>OER</strong></td>
<td>Open Educational Resources. Teaching, learning and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others.</td>
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<td><strong>OLE</strong></td>
<td>Online Learning Exchange. The exchange resides, as the title suggests, online to connect teachers to libraries of subject-specific media assets, editable content, and user-generated materials.</td>
</tr>
<tr>
<td><strong>OSBM</strong></td>
<td>Office of State Budget and Management.</td>
</tr>
<tr>
<td><strong>PBIS</strong></td>
<td>Positive Behavior Intervention and Support. Positive Behavior Intervention and Support programs are a way to impact school learning environments by establishing and reinforcing clear behavioral expectations in order to support high student performance and to reduce behavioral problems. PBIS site schools work to integrate their Safe Schools Plans, character education efforts and strategies, and discipline efforts in order to make the schools caring and safe communities for learning.</td>
</tr>
<tr>
<td><strong>PD</strong></td>
<td>Professional Development. The term refers to skills and knowledge attained for both personal development and career advancement such as continuous courses, workshops, activities and learning objectives aimed at helping professional educators and staff members improve their skills in their fields.</td>
</tr>
<tr>
<td><strong>PEP</strong></td>
<td>Personalized Education Plan. An individualized educational plan designed to improve a student’s performance to grade-level proficiency.</td>
</tr>
<tr>
<td><strong>PLC</strong></td>
<td>Professional Learning Communities. PLCs are defined by collaborative inquiry, shared decision-making and joint planning of instruction among teachers. Teachers are provided structured time to work together in planning instruction, observing each other’s classrooms, and sharing feedback.</td>
</tr>
<tr>
<td><strong>PMR</strong></td>
<td>Principal’s Monthly Report.</td>
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<tr>
<td>PPAR</td>
<td>Professional Personnel Activity Report. See SAR.</td>
</tr>
<tr>
<td>PPE</td>
<td>Per Pupil Expenditure.</td>
</tr>
<tr>
<td>PRC</td>
<td>Program Report Code. Charter school’s state PRC is 036. Each federal grant has its own PRC.</td>
</tr>
<tr>
<td>PSAT</td>
<td>Pre-Scholastic Assessment Test. Normally taken by high school juniors as a practice test for the SAT. Some schools use the PSAT as a diagnostic tool to identify areas where students may need additional assistance or placement in more rigorous courses.</td>
</tr>
<tr>
<td>PSU</td>
<td>Public School Unit – inclusive term to include LEAs, public charter schools, and state and federal schools</td>
</tr>
<tr>
<td>RALC</td>
<td>Regional Alternative Licensing Center. RALCs are state approved as of 2001 and began in 2002 to evaluate transcripts and prescribe professional educator’s licensure plans of study to obtain a clear teaching license. Required coursework needed to meet the identified competencies on the RALC plans of study may be completed at any regionally accredited college or university. Approved coursework can be found on the RALC website at <a href="http://www.ralc.us">www.ralc.us</a>. A minimum of one year of successful public school employment in the licensure area in which an applicant receives a plan of study and completes a plan of study is required to obtain a clear professional educator’s license.</td>
</tr>
<tr>
<td>READY</td>
<td>The READY initiative, which is being implemented in public schools in the 2012-13 school year, focuses not only on student proficiency in foundational subjects but on ensuring students are career and college ready when they graduate high school. The initiative is characterized by a new Standard Course of Study, assessments and accountability model.</td>
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<tr>
<td>RESA</td>
<td>Regional Education Service Alliance. These regional alliances (sometimes called consortium) provide staff development, leadership development, technical assistance and help in spreading information related to state initiatives to member public school systems in each of the state’s nine geographic regions: Northeast, Southeast, Central Carolina, Sandhills, Piedmont-Triad, Southwest, Northwest, Western and Roanoke River Valley.</td>
</tr>
<tr>
<td>RIF</td>
<td>Reduction in Force.</td>
</tr>
<tr>
<td>RtA</td>
<td>Read to Achieve. NC state law to ensure every student reads at or above grade level by the end of third grade and progresses in reading proficiency so that he or she can read, comprehend, integrate, and apply complex texts needed for secondary education and career success.</td>
</tr>
<tr>
<td>RtI</td>
<td>Responsiveness to Instruction. RtI is a multi-tiered framework that promotes school improvement through engaging, high quality instruction. North Carolina’s RtI employs a team approach to guide educational practices, using a problem-solving model based on data, to address student needs and maximize growth for all.</td>
</tr>
<tr>
<td>RttT</td>
<td>Race to the Top. RttT is a federal grant program that supports the efforts of the NCDPI, local school districts and many charter schools to carry out the state’s Career &amp; College: Ready, Set, Go! initiative. This bold education reform effort is focused on college- and career-ready standards and assessments, data systems, great teachers and leaders, and school turnarounds. North Carolina is one of 12 recipients of RttT grant awards. Approximately half of the $400 million in RttT funding is being distributed to districts for their own initiatives that support North Carolina’s Race to the Top plan through 2014.</td>
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<td><strong>SAR</strong></td>
<td>School Activity Report. The SAR shows an individual school's full year academic schedule, courses offered, enrollment of classes, length of classes, and staffing of classes. When a school is operating with multiple school calendars that have different numbers of school days, the data has to be submitted via Professional Personnel Activity Report (PPAR) forms.</td>
</tr>
<tr>
<td><strong>SAT</strong></td>
<td>The SAT is often taken by high school juniors and seniors as a precursor to college/university admission. It assesses a student’s verbal, mathematical and writing skills.</td>
</tr>
<tr>
<td><strong>SBE</strong></td>
<td>State Board of Education. The State Board of Education is charged with supervising and administering “the free public school system and the educational funds provided for its support.” The Board consists of the Lieutenant Governor, the Treasurer, and eleven members appointed by the Governor and confirmed by the General Assembly in Joint Session.</td>
</tr>
<tr>
<td><strong>SBS</strong></td>
<td>School Business Services, a division of FBS.</td>
</tr>
<tr>
<td><strong>School Month</strong></td>
<td>20 school days.</td>
</tr>
<tr>
<td><strong>School Year</strong></td>
<td>July 1st through June 30th.</td>
</tr>
<tr>
<td><strong>SCOS or SCS</strong></td>
<td>(North Carolina) Standard Course of Study. The SCOS is the guiding document outlining what should be taught in North Carolina public school classrooms.</td>
</tr>
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<td>Acronym</td>
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<tr>
<td>SEA</td>
<td>State Education Agency. Federal term for each state education department. SEA is another name for the NCDPI.</td>
</tr>
<tr>
<td>SEL</td>
<td>Social and emotional learning (SEL) is an integral part of education and human development. SEL is the process through which all young people and adults acquire and apply the knowledge, skills, and attitudes to develop healthy identities, manage emotions and achieve personal and collective goals, feel and show empathy for others, establish and maintain supportive relationships, and make responsible and caring decisions. (CASEL, 2020)</td>
</tr>
<tr>
<td>SFSF</td>
<td>State Fiscal Stabilization Funds.</td>
</tr>
<tr>
<td>SIP</td>
<td>School Improvement Plan. A plan that includes strategies for improving student performance, how and when improvements will be implemented, use of state funds, requests for waivers, etc. Plans are in effect for no more than three years.</td>
</tr>
<tr>
<td>SIS</td>
<td>Student Information System. SIS is a software application educational institutions use to manage student data such as enrollment. Also sometimes called a student information management system (SIMS).</td>
</tr>
<tr>
<td>SLC</td>
<td>[North Carolina] Student Learning Conditions [Survey]. This survey provides middle and high school students with the opportunity to express their perceptions regarding the learning environment in their schools. Similar to the NC Teacher Working Conditions Survey, student responses will be utilized for school and district improvement efforts.</td>
</tr>
<tr>
<td>SPG</td>
<td>School Performance Grades. School Performance Grades are awarded to schools as defined by G.S.§115C-83.15. A-F letter grades are calculated using achievement, growth, and performance measures.</td>
</tr>
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<td><strong>SSO</strong></td>
<td>Single sign-on. This term refers to users logging into several technology tools using one sign-on name and password.</td>
</tr>
<tr>
<td><strong>STEM</strong></td>
<td>Science, Technology, Engineering and Mathematics. STEM curriculum emphasizes connections within and between the fields of mathematics and science; integrates technology; introduces and engages students in the engineering design process; cultivates creativity; and develops skills that drive innovation.</td>
</tr>
<tr>
<td><strong>TIMS</strong></td>
<td>Transportation Information Management System. The computer system used by North Carolina school districts for routing and scheduling school buses to ensure safe and efficient bus routes.</td>
</tr>
<tr>
<td><strong>TIPS</strong></td>
<td>Team Initiated Problem Solving is a model created out of the University of Oregon and University of NC at Charlotte for using data for problem solving and decision making that includes a systematic team process generalize-able across data sets.</td>
</tr>
<tr>
<td><strong>Title I</strong></td>
<td>Title I is the largest federal education funding program for schools. Its aim is to help students who are behind academically or at risk of falling behind. School funding is based on the number of low-income children, generally those eligible for the free and reduced price lunch program. Title I used to be known as Chapter I.</td>
</tr>
<tr>
<td><strong>Title I A</strong></td>
<td>Federal funding program for schools to help students who are behind academically or at risk of falling behind. Funding is based on the number of low-income children in a school, generally those eligible for the free lunch program. Title I money supplements state and district funds.</td>
</tr>
<tr>
<td><strong>Title III</strong></td>
<td>Title III is the section of the Elementary and Secondary Education Act that provides funding and addresses English language acquisition and standards and accountability requirements for limited English proficient students.</td>
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<tr>
<td>Title IX</td>
<td>Title IX of the Educational Amendments of 1972 bans sex discrimination in schools receiving federal funds, whether it is in academics or athletics.</td>
</tr>
<tr>
<td>TWC</td>
<td>[North Carolina] Teacher Working Conditions [Survey]. A biennial survey of all North Carolina public schools’ licensed staff, the TWC survey provides educators with an opportunity to express their perceptions about working conditions at their schools. Information gathered from the survey is shared with school staff, district administrators, parents and the community for school improvement planning purposes. Survey results are available online at <a href="http://www.ncteachingconditions.org">www.ncteachingconditions.org</a>. In addition, the new evaluation instruments for superintendents, principals and teachers use TWC responses to reflect on the presence of working conditions in the school.</td>
</tr>
<tr>
<td>USED</td>
<td>United States Education Department. The USED provides federal assistance to state and local agencies primarily responsible for education and works to ensure both equal access (e.g., disadvantaged, disabled, at-risk students) and educational excellence. The department engages in four major types of activities: establishes policies related to federal education funds, administers distribution of funds and monitors their use; collects data and oversees research on America’s schools; identifies major issues in education and focuses national attention on them; and enforces federal laws prohibiting discrimination in programs that receive federal funds (USED website).</td>
</tr>
<tr>
<td>UERS</td>
<td>Uniform Education Reporting System. Law that requires LEAs and charter schools to submit data in a specific format. Applies to all data, not just financial data.</td>
</tr>
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<td><strong>UID</strong></td>
<td>Unique ID, assigns a unique NC WISE ID to every Student who participates in the North Carolina public school system. <a href="http://www.ncpublicschools.org/cedars/uniqueid/student/">www.ncpublicschools.org/cedars/uniqueid/student/</a></td>
</tr>
<tr>
<td><strong>WIDA</strong></td>
<td>The WIDA Consortium is an educational consortium of state departments of education that supports academic language development for students who are English Learners. The WIDA suite of assessments are what North Carolina uses to assess and monitor English language proficiency.</td>
</tr>
<tr>
<td><strong>Zero-out</strong></td>
<td>Process by which excess state or federal cash, held at the end of the month, is taken back by the state.</td>
</tr>
</tbody>
</table>
Planning Year Session V
January 25, 2023
Darian C. Jones, Ph. D.

LEADING MISSION-BASED PURPOSEFUL MEETINGS
“there is one thing that all boards have in common... They do not function.” (original emphasis)

~ Peter Drucker
4% Per Year Closure Rate
5% of new schools close in their first year

5 DYSFUNCTIONS OF CHARTER SCHOOL BOARDS
5 Dysfunctions of Charter School Boards…

Of 77 groups of schools that opened from 1998 to 2014,

*18 percent closed by the three-year mark. A large proportion of failures occurred by the completion of the first year.

• By the five-year mark, the closure rate had jumped to more than 1 in 4 charter schools.

• By the 10th year, 40 percent of charter schools had closed.

* In the available data, five groups of charter schools reached the 15-year mark, and by this point, one in two of those schools were gone. Failure rates ranged from 47 percent to 54 percent.

5 Dysfunctions of Charter School Boards…

Dysfunction #1 – Managing vs. Governing

Dysfunction #2 – Misappropriating Board Authority

Dysfunction #3 – Creating Revolving Door Accountability

Dysfunction #4 – Wasting Time on Administrivia

Dysfunction #5 – Failing to Develop Its Own Capacity
Agenda

- Goals and objectives
- Why do meetings matter?
- NC open meetings law
- What makes meetings successful?
- Planning for your next meeting
Goals and Objectives

Understand best practices for conducting meetings in accordance with NC open meeting laws

Understand best practices to run successful and efficient board meetings
Why Do Meetings Matter?

• The charter school board of directors has the public trust to govern and appropriately expend the public funds allotted to the school.

• School business **must be discussed and decided in open board meetings**.

• Properly conducted board meetings are fundamental to effective school governance.

• Minutes of meetings become the legal documentation of the non-profit corporation’s decisions.
How often should you meet?

- Board should meet every month, at least, during the start-up phase.
- Committees should meet additionally between meetings.
- Boards should meet 10-12 times per year once school begins.
- Boards must meet at least 8 times per year.
NC Open Meetings Law
NC Open Meetings Law (NCGS 143-318.10)

All board meetings and committee meetings must be open to the public and provide appropriate notice in advance of the meeting date, time, and location:

- Regular Meetings: Seven (7) Days
- Special-Called Meetings: Forty-eight 48 Hours (Includes subcommittee meetings)
- Emergency Meetings: Immediately after notice is given to all board members

Be cautious of over-using emergency meetings.
NC Open Meetings Law (NCGS 143-318.10)

All meetings must be properly noticed physically at the school and/or on the school’s website.

Committee meetings are subject to Open Meetings Law.

Meeting minutes should be taken and approved at every meeting.

Meeting minutes should be kept in a location available to the public (website).
NC Open Meetings Law – Closed Session

• Closed session procedures:
  1. State the purpose of going into closed session verbally and in the meeting minutes.
  2. Closed session discussion must be kept confidential.
  3. Maintain closed session minutes. Keep these notes separate from open meeting minutes.
  4. All voting must take place in regular open session.
NC Open Meetings Law – Closed Session

- There are nine (9) legal reasons in NC to go into closed session (pursuant to NCGS 143-318/11):
  - Privileged Information – General Statute 132 (Personnel, Student, Closed Session)
  - Discuss Award or Scholarship
  - Consult with attorney (not about general policy)
  - Expansion (Real estate/business negotiation)
  - Negotiations (terms of employment contracts)
  - Personnel matters
  - Investigate concerns of criminal matters
  - Form emergency plans for response to school violence
  - Briefings from law enforcement (public safety, terrorism, etc.)
What do you do if you want to make a decision based on the closed session discussion?

- Come out of closed session and vote
- Make a motion that makes clear to the public what the vote is for.
  - Example: Voting ‘yes’ or ‘no’ on package A does not tell the public what package A is.

Remember, you must come out of closed session to adjourn the meeting.
Can the board make decisions about the school through email?

No

Electronic “discussions” of school business involving several board members could be construed as a meeting and **are in violation of the open meetings law**

You can communicate via email, just communicate individually and avoid a quorum of board members

Do not “reply all” to an email from a board member that discusses school business
What makes meetings successful?
What are the characteristics of a successful board meeting?

| Focusing, with intensity, on the mission of the school | Start each meeting by stating the mission  
Routinely refer to the board’s/school’s strategic plan and goals |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluate outcomes (student, staff, and board)</td>
<td></td>
</tr>
<tr>
<td>Consistently high attendance of members</td>
<td></td>
</tr>
</tbody>
</table>
What are the characteristics of a successful board meeting?

- Has a clearly outlined agenda
- Stays on schedule (starts and ends on time; allows ample time for presentations and discussion)
- Follows Roberts Rules of Order
- Detailed committee reports
- Robust and open discussion
- Students first mindset
**Sample Meeting Agenda**

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call to order</td>
</tr>
<tr>
<td>Reading of the School’s Mission and Conflict of Interest Policy</td>
</tr>
<tr>
<td>Approval of Minutes</td>
</tr>
<tr>
<td>Public Comment</td>
</tr>
<tr>
<td>Approval of Agenda</td>
</tr>
<tr>
<td>Officer Reports</td>
</tr>
<tr>
<td>Director’s report</td>
</tr>
<tr>
<td>Special Committee Reports</td>
</tr>
<tr>
<td>New Business</td>
</tr>
<tr>
<td>Announcements</td>
</tr>
<tr>
<td>Adjournment</td>
</tr>
</tbody>
</table>
Parliamentary Procedure

• Remember…
  – The board chair must restate the motions so all members of the board and audience can hear the motion
  – All voting, according to open meeting laws, must be completed in open session
  – Voting cannot take place by secret ballot
Committee Structure

• Boards should develop committees to dig deep into specific school issues:
  – Budget and Finance
  – Governance
  – Building/Facilities
  – Strategic Planning
  – Academics/Instruction

• Use your board’s expertise

• Allow in-depth discussions that can then be summarized for the full board
Meeting Materials and Timelines

• The following materials should be created and included in a board packet for a meeting:
  – Agenda
  – Director/Principal Report
  – Committee Reports
  – Policies, Bylaws, Amendments
  – Reviews/Summaries of Action Items

• Only include documents relevant to the meeting topics being discussed
Meeting Materials and Timelines

Materials should be prepared by the board chair, committee chairs, and directors

Agendas should be finalized at least 2-3 weeks prior to the meeting and sent to members

All committee reports or other materials should be sent to the board at least 1 week prior to the meeting and sent to members

All reports and presentations should be reviewed by members prior to the meeting
Warning Signs of Ineffective Meetings

- Lack of order during discussion
- Poor time management
- Committee reports or other materials do not relate to the school mission and goals
- Few people do the majority of talking
- Focusing on the wrong things
- Not following parliamentary procedure
Planning for your Next Meeting

Look at the agenda you have prepared for your next meeting (or start preparing one)

Ask yourselves the following questions:

<table>
<thead>
<tr>
<th>Does the agenda follow a clear, outlined structure?</th>
<th>Is there ample time for discussion?</th>
<th>Will you have time to review committee reports and materials prior?</th>
<th>Is every item mission-based?</th>
</tr>
</thead>
</table>

Look at the agenda you have prepared for your next meeting (or start preparing one)
QUESTIONS?
Read, Lead, Succeed!
Early Literacy and Charter Schools

Tonia Parrish
Read to Achieve Business & Charter Coordinator

NC DPI Office of Early Learning
Today we will:

1. Give an overview of NC legislation as it relates to early literacy and charter schools
2. Discuss mCLASS® DIBELS® 8 statewide assessment as an option for charters
3. Share resources
Early Literacy Legislation in North Carolina
Read to Achieve (RtA)  
Historical Background

- Part of the Excellent Public Schools Act - Became law in July, 2012
- Implemented in 2013-2014
- **Goal:**
  - Ensure that every student reads at or above grade level by the end of third grade and continues to progress in reading proficiency so that he or she can read, comprehend, integrate, and apply complex texts needed for secondary education and career success. (2012-142, s. 7A.1(b).)

- **Purpose:**
  - Ensure that difficulty with reading development is identified as early as possible
  - Students receive appropriate instructional and support services to address difficulty with reading development and to remediate reading deficiencies
  - Each student and his/her parents or guardian be continuously informed of the student’s academic needs and progress
SB 387
Excellent Public Schools Act

An act to modify the implementation of the North Carolina Read to Achieve Program in order to attain statewide reading proficiency by third grade.
PART VIII. DIGITAL CHILDREN'S READING INITIATIVE

SECTION 8. The Department of Public Instruction shall develop a Digital Children's Reading Initiative (Initiative) for the purpose of increasing the percentage of school children throughout the State who are reading proficiently by the end of third grade. The Initiative shall be aligned with the Science of Reading and shall reflect the standards taught in each grade level from kindergarten to third grade. The Initiative shall be designed to assist parents, guardians, and family members in cultivating confident, proficient, lifelong readers by providing free tools and resources that can be easily incorporated into everyday life.

The Department shall develop a model literacy implementation plan that implements the standards developed and (b) an example of a literacy implementation plan that would not implement the standards developed and explanatory guidance on why it would not implement the standards.

Each local school administrative unit shall evaluate its literacy curriculum and instruction methods and shall modify as necessary to adhere to the standards developed by the State Board and align with the model literacy implementation plan provided by the Department. No later than December 15, 2022, and in a form prescribed by the State Board, each local school administrative unit shall submit to the State Board a concise explanation of its literacy curriculum and instruction, as aligned with the standards and model literacy implementation plan.
## Introduction
- Read to Achieve Implementation Guide

## Section I
- Legislative Components

## Section II
- Science of Reading Overview

## Section III
- Early Literacy Program & Professional Development

## Section IV
- Educator Preparation Programs

## Section V
- Literacy Curriculum and Instruction Aligned to Read to Achieve

## Section VI
- Literacy Interventions and Individual Reading Plans

## Section VII
- Reading Camps, Bonuses & Excellent Public Schools Act Funds

## Section VIII
- Digital Children’s Reading Initiative

## Section IX
- Assessments

## Section X
- Enhance Data Collection and Reports

## Section XI
- Glossary

## Section XII
- Appendices
NC Digital Children’s Reading Initiative
DIBELS
Dynamic Indicators of Basic Early Literacy Skills

Assessment
## DIBELS measures at each grade level

<table>
<thead>
<tr>
<th>Measure</th>
<th>Grade K</th>
<th>Grade 1</th>
<th>Grade 2</th>
<th>Grade 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter Naming Fluency</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phonemic Segmentation Fluency</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nonsense Word Fluency</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Word Reading Fluency</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Oral Reading Fluency</td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Maze (Basic Comprehension)</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
## Additional required measures at each grade level

<table>
<thead>
<tr>
<th>Measure</th>
<th>Grade K</th>
<th>Grade 1</th>
<th>Grade 2</th>
<th>Grade 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral Language</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Vocabulary</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Resources
State Level Support Guide
Science of Reading

Many Strands Are Woven into Skilled Reading

Scarborough’s Reading Rope (2001)
“Teaching Reading is Rocket Science!”

Dr. Louisa Moats
Break

We will Return at 10:15
New School - New Vision

Navigate with Home Base

DTL/Home Base Team 2022-23

Matthew Mayo - Home Base Manager

- Corey McNeill - Digital Learning Systems Consultant
- Justin Conner - Power School Business Manager
- Cami Narron - Education Product Consultant
- Tessa Hine - SIS Specialist
- Rebecca Stokes - Professional Development Specialist
- Jennifer Causey - HB Communications Specialist
- Audrey Long - Education Program Specialist
- Russell Dixon - User Support Analyst
- Donna Currie - Digital Subscriptions & Technology Analyst
Digital Teaching & Learning

Jill Darrough - Section Chief for Digital Teaching and Learning

- Amy Bennett - Northeast Consultant
- Lauren Boucher - Southeast Consultant
- Cynthia Sartain - North Central Consultant
- Kathy Parker - Sandhills Consultant
- Brian Whitson - Piedmont-Triad Consultant
- Lindsey Sipe - Southwest Consultant
- Donna Murray - Northwest Consultant
- Vera Cubero - Western Consultant
- Carmella Fair - Instructional Resource Consultant

- Mollee Holloman - Eastern ILC
- Carrie Robledo - Central ILC
- Stacy Lovdahl - Western ILC
Charting the PSU Path:

<table>
<thead>
<tr>
<th>#</th>
<th>What is Home Base?</th>
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</thead>
<tbody>
<tr>
<td>01</td>
<td>Schoolnet, Canvas, #GoOpenNC,</td>
</tr>
<tr>
<td>02</td>
<td>NCEES (Perform Enterprise &amp; Professional Learning), Britannica and EBSCO</td>
</tr>
<tr>
<td>03</td>
<td>PowerSchool SIS PowerTeacher Pro</td>
</tr>
<tr>
<td>Q&amp;A Wrap Up</td>
<td></td>
</tr>
</tbody>
</table>
Charting the Home Base PSU Path

What is Home Base?
Home Base is Designed to...

Empower Teachers
Connect Parents
Engage Students
Support Administrators
The NCEdCloud
my.ncedcloud.org
Identity and Access Management (IAM)
Service accounts provide teachers, students, and staff
with a single sign-on to all Home Base applications.
Learn More Here
The Value within Home Base

An Ecosystem for Personalized Learning in NC

**PowerSchool**
- Manage school process for attendance, grades & data
- Provide real-time feedback to parents, students, and educators
- Access to a multi-language parent portal

**PowerTeacher Pro**

**Schoolnet**
- Create lessons with digital content and shared resources
- Develop and deliver aligned assessments for classroom or benchmark purposes
- Analyze data to inform Practice

**NC Educator Effectiveness System (NCEES)**
- Record and manage NC Educator Evaluation data
- Select online courses aligned to meet professional learning needs
- With additional Opt-in, manage local PD learning opportunities

**Canvas**
- Create and manage online course content with intuitive design that is easy for educators
- Engage students and teachers through discussion boards and collaboration spaces

---

Student Portal
Parent Portal

Evaluation
Professional Learning

Student Portal
Parent Portal
DPI Canvas
113
The Value within Home Base
An Ecosystem for Personalized Learning in NC

OER
Find high-quality resources based on standards or search criteria
Contribute to a shared repository of North Carolina made resources
Integrates seamlessly with LMS and IIS systems

Britannica
Discover encyclopedia articles, multimedia, primary sources, games, and other learning resources.
Look for people, places, and things. Watch and learn with videos, images and animations and have fun with games and activities including geography tools, animal kingdom and biographies.

EBSCO
A research platform for delivering database content.
Leveled primary source documents, news articles, eBooks, magazine subscriptions and videos organized by popular topics including animals, art, music, biographies, geography, language arts, math, science, health and social studies.

#GoOpenNC
NC Standards Aligned
Online Encyclopedia and Dictionary
Online Research Platform
Why Opt In to Home Base?

Included with Opt In:

- IAM, PowerSchool, NCEES (Evaluation Component), #GoOpenNC, SchoolNet, EBSCO, and Britannica

Optional components (ADM Based Cost):

- NCEES (Local Professional Development Office Component), Canvas, Transcend
Home Base Resources

- Home Base Website
  - Link to Website

- Link to Home Base Priorities Padlet
  - enter your questions for Home Base during this presentation.
    - use the + sign to add a comment or question
Charting the Home Base PSU Path

Home Base for Learning

DIGITAL TEACHING AND LEARNING
NC Department of Public Instruction
Schoolnet

Schoolnet is the state’s instructional improvement system designed to facilitate formative and summative assessments and provide educators with immediate performance data that can inform instruction.

- Access to Schoolnet is included in the $1 per ADM opt-in for Home Base
- Students can take assessments online or via paper/pencil
- Schoolnet has over 100,000 assessment items aligned to North Carolina Standard Course of Study, including items in Spanish
  - Over 220 complete, ready-to-use assessments including EOG/EOC and NCFE’s
- Schoolnet has support for read aloud, color contrast, extended time, and line reader accommodations for online testing
- Schoolnet connects to PowerSchool and assessment grades are easily transferred into PowerTeacher Pro
- Schoolnet also offers Canvas integration if your charter will be using Canvas
- Optional add-on: Transcend computer adaptive benchmarking for $4 per 3-8 ADM. *Home Base opt-in required.
Canvas

Canvas is a Learning Management System (LMS) that supports the instruction of students in a face to face, blended, or online delivery format.

- Access to Canvas is available via convenience contract.
- Canvas allows rich user collaboration with built in video conferencing and feedback tools.
- Canvas integrates with Google, Microsoft, and many other LTIs for seamless transfer of documents and materials.
- Access to Canvas also includes NC Canvas Commons, a repository of ready to use courses for student instruction and professional learning.
- Canvas Blueprint allows you to easily create and control instructional design with master courses to make it easier for teachers to start teaching with premade content.
- Canvas for Elementary feature creates a digital classroom that reflects the physical classroom experience for elementary students.

Canvas Admin Information Guide
#GoOpenNC

#GoOpenNC is a free collaborative platform for North Carolina Educators to find, share, and revise supplemental instructional materials aligned to North Carolina Standard Course of Study.

- Access #GoOpenNC from the NCEdCloud IAM tray.
- Educators can search resources by standard, grade level, subject area, and/or keyword.
- Evaluate resources using North Carolina Quality Review Rubric.
- Collaborate with educators across the state using hubs and groups.
- #GoOpenNC has an LTI integration for most LMS systems including Canvas and Blackboard.
- While #GoOpenNC is free, it is not Google and resources are curated and aligned to NC standards.

#GoOpenNC Admin Information Guide
How can Home Base support your vision for digital teaching and learning? Which applications are you interested in learning more about or providing at your school?

Share your priorities
Unified Talent

Perform Enterprise & Professional Learning
NCEES Evaluation Component

With the North Carolina Educator Effectiveness System staff will

- **ENGAGE**: NCEES provides a platform where all the pieces of a professional development plan can connect with one another including evaluations, observations and improvement plans.

- **LEARN**: Professional Development in NCEES helps Public School Units (PSUs) manage professional development for staff through DPI PD or a Local PD Office (with opt-in) in NCEES.

- **SUPPORT**: NCEES centralizes this information in one place to support teachers, support staff and administrators’ professional growth. Track CEUs on staff transcripts.

- **MEASURE**: PSUs utilize NCEES to measure competencies through both professional development plans and staff evaluation plans.

NCEES Admin Information Guide
Why use the Online Evaluation System?

**Successful students**
Ensure every student is on track to graduate postsecondary and workforce ready. Increase achievement for all students and close achievement gaps.

**Effective teachers and leaders**
Effective educator evaluation instruments based on NC teacher standards and NC standards for administrators. Increase and support the effectiveness of all educators with professional development plans. Optimize the preparation, retention, and effectiveness of new educators.

**Outstanding Public School Units (PSUs)**
Increase school and district performance through professional development. Free access to NCDPI self-paced Canvas and Moodle modules aligned to staff standards and elements. Dashboards to track standard aligned CEUs through local PD course modules and varied PD opportunities.

**State Board of Education Vision**
Every public school student in North Carolina will be empowered to accept academic challenges, prepared to pursue their chosen path after graduating high school, and encouraged to become lifelong learners with the capacity to engage in a globally-collaborative society.
State Board of Education Mission & Goals

https://stateboard.ncpublicschools.gov/

Mission:
The mission of the North Carolina State Board of Education is to use its constitutional authority to guard and maintain the right of a sound, basic education for every child in North Carolina Public Schools.

Goals:
- Goal 1: Eliminate opportunity gaps by 2025
- Goal 2: Improve school and district performance by 2025
- Goal 3: Increase educator preparedness to meet the needs of every student by 2025
NCEES PD Office Component

The PD office provides the ability to:

• Create and manage local professional learning opportunities and track CEUs;
• Share local PD/CEU opportunities with other PSUs for regional or shared events.
• Transfer Credit Manager – manages approvals for CEUs earned outside of the district to show on staff transcripts
• PSUs are given access to NCEES Professional Learning PD office component for $1/ADM (this fee also includes access to Schoolnet)
EBSCO and Britannica

EBSCO and Britannica are digital subscriptions providing access to resources including research databases. EBSCO and Britannica can be accessed through NCEdCloud IAM.

- Encyclopedias and Dictionaries
- Over 70,000 eBooks
- Britannica® Escolar and Britannica® Moderna, a comprehensive collection of Spanish-language resources.
- Educators collection for professional learning
- Subject aligned reference centers and content
- Access to primary resources

EBSCO/Britannica Resource ToolKit
How can Home Base support your goals for Leading administrators, teachers, support staff and students? Which applications are you interested in learning more about or providing at your school?

Share your priorities
Charting the Home Base PSU Path

Home Base Data Logic

DIGITAL TEACHING AND LEARNING
NC Department of Public Instruction

HOME BASE

PUBLIC SCHOOLS OF NORTH CAROLINA
State Board of Education | Department of Public Instruction
PowerSchool SIS

PowerSchool is the official student information system used statewide by all public schools of North Carolina for storing and managing student data. It maintains over 1.5 million student records and provides robust capabilities for educators and administrators to effectively manage school processes. It reinforces personalized learning by offering the ability to tailor a student's instructional path with his or her interests, skills and goals. One of its many great features is the Parent Portal which gives parents and students access to student grades and assignments online. This information is also available through the Parent Portal App for those on the go!

- PowerSchool Features: classroom scenes
- Real-time student data
- On-board scheduling utility
- Attendance tracking
- Special programs
- Student transcripts

- Parent & student portal
- Course request management
- Online course registration
- Enhanced reporting tools for state & federal compliance
- Transportation integration and much, much more!
PowerSchool PowerTeacher Pro

PowerTeacher Pro, PowerSchool's gradebook, is intuitive with robust capabilities. It allows for traditional and standards based grading, and it is mobile friendly!

Use PowerTeacher Pro to:

- Take attendance
- Create assignment categories
- Create assignments
- Score assignments and work with grades
- Calculate and enter Final Grades for storing
- Assess student and class performance
- Refine district-level grading preferences
- Run student reports

PowerTeacher Pro Resources

Available Reports for Teachers

- Progress reports
- Missing and late assignments
- Standards final grades and assignment standards scores
- Grades
- Citizenship
- Category totals
- Assignment scores
- Comments
- Summary of student work to present to parents at conferences or to a principal during a review
- Midterm update for students and parents
How can Home Base support your needs for managing teacher and student PSU data? Which applications are you interested in learning more about or providing at your school?

Share your priorities
How does HomeBase support?

HomeBase Meetups & SIS Charter Connects

DIGITAL TEACHING AND LEARNING
NC Department of Public Instruction

HOME BASE

PUBLIC SCHOOLS OF NORTH CAROLINA
State Board of Education | Department of Public Instruction
Home Base Support

- Home Base Meet Ups (Virtual and Face to Face)
- SIS Regional Coffee Chats
- Product specific monthly webinars
- SIS Conference
- Monthly bulletins
- SIS weekly bulletins
- SIS Initial Product Training (IPT)
Charting the Home Base PSU Path

Q&A Wrap Up
Questions? Contact Us!

HB Team: Home_Base@dpi.nc.gov
Lunch

12:30 PM – 1:30 PM
PM Sign In

Follow the link in the Chat
Keeping up with the Evolving Charter Landscape

Ashley Baquero
Director, OCS
January 25, 2023
Agenda

• OCS Overview
• Small stuff … BIG stuff
• How to stay informed … where to go?
Office of Charter Schools

Overview + Work Flows
Mission

• In conjunction with the SBE and CSAB, the Office of Charter Schools works to ensure the existence of high-quality public charter schools by providing guidance and monitoring oversight to charter school non-profit board of directors and charter schools through a rigorous approval process, effective oversight, and meaningful collaboration.
Our Core Values

- Service
- Teamwork
- Accountability
- Reliability
- Accuracy

*We should be your first call, not the last call!!*
Team OCS

- Ashley Baquero, Director
- Six Consultants – Two more in the works!

<table>
<thead>
<tr>
<th>Jenna Cook</th>
<th>Nicky Niewinski</th>
<th>Darian Jones</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natasha Norins</td>
<td>Joseph L. Maimone</td>
<td>Melanie Rackley</td>
</tr>
</tbody>
</table>

- Currently, 207 Charter Schools operating in North Carolina.
Applications

• Lead consultant: Ms. Melanie Rackley
• Melanie.Rackley@dpi.nc.gov
  – Facilitates the new school application process.
  – Provides training to applicants.
  – Hires and trains external evaluators.
  – Provides updates to CSAB members.
Communications & Data

• Lead consultant – Joseph L. Maimone
• Joseph.Letterio@dpi.nc.gov
  – Manages all internal and external communication between the Office of Charter Schools and the general public.
  – Responds to data requests.
  – Provides Epicenter assistance.
OCS Communications

“Hey, did you hear what the OCS just posted/sent/communicated?”

- Weekly Newsletter
- Leadership blasts
- Twitter @NCCharterOffice
- Consultant developed online newsletters
- Website
- Epicenter resources for PD
- General email: ocs@dpi.nc.gov
Performance Framework

• Lead consultant – Joseph L. Maimone
• Joseph.Letterio@dpi.nc.gov
  – Facilitates the yearly collection and audit of documents from schools to ensure compliance with statute, policy, and the Charter Agreement.
Planning Year & Ready to Open

• Lead Consultant – Natasha Norins
• Natasha.Norins@dpi.nc.gov
  – Facilitates the required training sessions for the Planning Year for newly approved applicants, including the Ready to Open process.
  – Helps to ensure schools are ready to open and operate successfully.
Professional Development

• Lead consultant: Dr. Darian Jones
• Darian.Jones@dpi.nc.gov
  – Works with his team to develop and implement PD sessions offered through OCS.
  – Leads TOY/POY and scholarship processes.
  – Coordinates PD sessions offered by DPI staff.
Stakeholder Support

• Lead consultant: Dr. Darian Jones

• Darian.jones@dpi.nc.gov
  – Manages grievances and complaints from stakeholders.
  – Produces OCS Guidance Documents and tools/resources.
Renewals

• Lead consultant – Mrs. Jenna Cook
• Jenna.cook@dpi.nc.gov
  – Facilitates the charter renewal process including renewal data collection, renewal site visits, and renewal interviews.
  – Prepares renewal documentation for CSAB and SBE.
Reports & Rules

• Lead Consultant – Nicky Niewinski
• Nicole.Niewinski@dpi.nc.gov
  – Produces reports required through legislation and/or SBE requests.
  – Works with the DPI Rules Coordinator and Rules Commission to facilitate the rules process as it pertains to charter-related rules.
SBE/CSAB/Amendments

• Lead Consultant – Nicky Niewinski
• Nicole.Niewinski@dpi.nc.gov
  – Facilitates process of obtaining approval for any modifications to a school’s charter application (amendment process).
  – Organizes and manages CSAB meetings.
  – Prepares SBE materials.
Risk Assessment

- Lead Consultant – Ashley Baquero
- Ashley.Baquero@dpi.nc.gov
  - Conducts site visits and monitors at-risk schools.
  - Analyzes academic data; monitors and supports low-performing schools.
  - Manages DPI compliance team meetings and analyzes/records DPI charter school compliance data.
  - Manages closure process and revocation appeals.

Public Schools of North Carolina
Don’t let the small stuff become the BIG stuff …
Small Stuff – BIG impact

• **PowerSchool**
  – All PSUs must use PowerSchool for attendance, discipline, and grades. Parents should be informed of, and have access to, the parent portal.
  – Plug-ins or changes to the PS system for your school must go through our DIT department.

• **EDDIE**
  – Update every time a new BOD Chair/Vice Chair/Admin/Title IX coordinator/EL/EC person comes in. *This is the authoritative source of information in the state. Make sure emails are not personal; use an official school email.*
Small Stuff – BIG impact

• Nepotism and COI
  – Follow the rules and report to the OCS/NC DPI if there is a nepotism issue/hire.
  – Make sure you review Section 4 of your Charter Agreement.
  – Consider even the appearance of impropriety when hiring.

• McKinney-Vento
  – Schools must designate a liaison for children and youth experiencing homelessness. It is highly recommended that information regarding this act is posted on your website.
  – All states must have a state dispute policy (NC's is available [here](#)) and each PSU must handle any local disputes in accord with their state's policy.
Small Stuff – BIG impact

• **School Mental Health Improvement Plan**
  – Schools are required to upload a copy of their School Mental Health Improvement Plan
  – All charter schools are required to report their progress on meeting the guidelines.

• **Policies**
  -Should be reviewed annually. Changes only require BOD approval – not OCS approval - but reach out with questions.
Small Stuff – BIG impact

• Bylaws
  – Review at least annually. Require OCS approval as an amendment.
How to stay informed … where to go?
MUST KNOW Resources

- Charter Agreement
- SBE Policies – CHTR
- NC Administrative Code – 16 NCAC O6G
- Epicenter
- DPI Website
OCS Newsletter

• Make time
• Have a plan for administrative review
Other DPI Newsletters

• Sign up and share with admin team/staff
• https://public.govdelivery.com/accounts/NCSBE/subscribe/new
Legislative Updates

• SBE and Legislative Affairs newsletters
• OCS newsletter
  – This is a critical resource, and you will not receive if EDDIE is not updated.
  – Contact Joseph Letterio with any communication updates/questions.
• All other DPI staff ONLY use EDDIE!!
“We want every student to succeed at school and in life.”

Casting the Vision

Sallie B. Howard School of Arts & Science

January 25, 2023
My Sophomore Year at Kittrell College Taken at Wilson, 1942
Front Row Seated: (L-R) Wilbert Stanley, JoAnne Woodard, Joseph Ricks, Antonia Ford, Thurman Flowers, Mary McClain, Thomas Lofton, Betty McGill; Second Row (L-R) William Sharpe, Hortense Gardner, Dazzarine Green, Joseph Davis, Letitia Atkinson, David Creech, Sallie Howard; Standing (L-R) Ernest Farmer, James Smith, Samantha Jones, Darryl Williams, Claudia Barnes, Andre Winstead, Mary Witherspoon, Anthony Jordan.
This YEP summer camp ‘best ever’

By Donna Mungovan

AddressAmerica has history lessons and positive role models in the things that made the year’s Youth Enrichment Program a success, organizers say.

“It was the best ever,” said Director James Winstead, “and it’s like that every year (it just got better).” There were six classes participating in the program.

Sessions included music, volleyball, kitchen, science, arts, and drapery. Each day began with a devotion with a small group and ended with a large group. Lunch was provided.

“A trip to Raleigh was an education in government,” Winstead said. Children visited the State House, the Senate, and House of Representatives, and had lunch at the Capitol. They also visited the Farm Bureau and the Legislative Museum.

Mr. Woodard credits the camp’s success to “very enthusiastic” teachers and assistant teachers who were able to work with the children throughout the week.

The trip was designed to educate and make young people aware of the importance of taking care of the community. It was also an opportunity for children to learn about their state and what they have learned about it.

Charter draws lots for spots

By Adrienne Mungovan

On the morning of July 1, 2017, the school held its first annual Charter Charter Lottery.

There was excitement as the names were called out. The names were placed in a large box, and each name was drawn one by one.

The names were called out in the order of the lottery, and those who were called first were the lucky ones.

“Charter draws lots for spots” by Adrienne Mungovan

© 1997 Wilson Daily Times
Biotech camp readies kids for STEM jobs

By Drew C. Wilson
dwilson@wilsontimes.com
152-265-7818

Sallie B. Howard High School for the Arts and Science hosted its first ever biotech camp this week.

Biotechnology instructor Brandi Simono said nine middle school and high school students and her fifth and sixth grade daughters participated in the four-day camp held in the school's state-of-the-art biotech teaching lab.

“I think it is a really good opportunity to see what biotechnology is about and to learn new things about it,” said Astrid Santa Maria Lopez, 13, a seventh grader at Sallie B. Howard School.

The camp's mission is to familiarize students with biotechnology so they can understand its applications. The school now has a biotech emphasis.

Students learned how to use micropipettes, used enzymes to create cheese overnight and worked on forensics applications with gel electrophoresis using electrical currents to separate DNA molecules.

“It’s cool,” said 13-year-old Adrian Ruffin, an eighth grader at the school. “You get to work with a bunch of stuff I have never worked with before, and it's something I like.”

Kiera Hunter, 14, said she’s considering exploring a career in biotechnology.

“I love it,” Kiera said. “It is a lot more than I could ever imagine learning, especially for a freshman. Also, we get to be independent in the lab with some assistance.”

“Our hope is as they work through this, they will grow and love any type of STEM and any type of science because we have a lot of chemistry and biology applications,” Simono said.

“Then they can even go into the workforce after they graduate from Sallie B. Howard, they can go to a community college or they can go to a four-year college. These students will really know their way around lab and science in general,” Simono said.

“Sallie B. Howard School for the Arts and Science seventh graders Layla Guzman, left, and Astrid Santa Maria Lopez participate in a biotech camp at the school this week.”

Drew C. Wilson / Times

“Sallie B. Howard School for the Arts and Science seventh graders Layla Guzman, left, and Astrid Santa Maria Lopez participate in a biotech camp at the school this week.”

“Sallie B. Howard School for the Arts and Science seventh graders Layla Guzman, left, and Astrid Santa Maria Lopez participate in a biotech camp at the school this week.”

That's why I bring my fifth and sixth grader in here, so people can see that you can do this at a young age,” Simono said. “You can come in come in here and work on these skills. It gives you a great hands-on experience that they can translate into the real world, and to me, that is just priceless.”

Clark Moore of the Rotary Club of Wilson visited the day camp Wednesday.

“T think it is a very fast forward program.”

Moore said “It's cutting edge. It's iconic for Wilson. I think it is going to make us a better community for what she is doing here.”
“We want every student to succeed at school and in life.”

Casting the Vision

Sallie B. Howard School of Arts & Science

January 25, 2023
Our work at SBHS centers around making sure that everyone, every student, succeeds at school and in life. That is our mission. That is why we are here.

We know that every child has value and worthy of an education that prepares them for success in life.
How Did We Get Here?

An unyielding and unwavering clarity of purpose. Who we are serving and why we are serving students and families historically left out of and neglected in traditional systems of education.
Making a Difference

“I want to be somewhere, work somewhere, where my presence makes a difference in the lives of others. Where if I am not there to do my job, the people I serve will miss out on something important. I have felt in some settings, that my students would be just fine if I am not there. They have all the people and support they need to succeed at school and in life. Where I want to be is in a setting where I matter, my instruction matters, where I am the difference in students learning and mastering lessons, falling in love with learning and see a future for themselves.”
Impact of COVID Disruptions

1. 1½ years disconnected from students and each other and fearing our own survival; interrupted, disrupted and weakened instruction, resulting in severe learning losses yet to be recovered.

1. Restoring, refocusing, renewing, remembering why we are here – to be the difference in every student succeeding at school and in life – is vitally important in achieving that goal for our students and ourselves.
We Do This Together - As One Body

- United as one body, one team, on a single mission, a common purpose – to see every student succeed at school and in life.

- You have a head start on fulfilling your mission. You have a talented team of educators and staff who love children, want to see them succeed, and willing to work together to achieve our common goal.
Do This Together - As One Body (cont.)

- You have leaders, coaches, teachers, and staff to support one another in preparing and delivering effective instruction that consistently produce high achievement results for all students when we apply these practices consistently and with fidelity.

- Begin today with instructional leaders giving a deep dive into instructional habits, brain research, and a mindset that when consistently applied in practice with fidelity, will produce higher levels of learning for all students.

- This is only the beginning, not the end, of your journey to ‘Excellence Without Excuse’.
Facilities

• Lease space in churches, community facilities
• Find vacant buildings/warehouses to renovate
• Find public schools or any schools that have closed
• Lease mobile buildings
• Other
Recruitment

- church services/meetings
- door to door, cable tv talk shows
- radio talk shows,
- sorority/fraternity meetings; civic meetings
- facebook live events
- digital media ads,
- website,
- newspaper announcements
- ice cream summer socials
- other
Funding

- Need 501©(3) eligibility for grants, foundation funding

- Federal grants on CCIP platform:
  a. 21st century after school program grants
  b. Safer schools grant
  c. CTE high school grants
  d. EC – school psychologist grant
  e. Title I for low income populations
  f. Title II to improve quality of teachers
  g. Title III for ESL services
  h. Title IV for student support and academic enrichment
  i. IDEA for EC/Special Ed populations
  j. other
Strategic Planning and Oversight:
Students, Performance, and Finances

Planning Year Session IV
January 25, 2023
Dr. Darian Jones-OCS
Learning Outcomes

• Goal Setting Recap/ S.M.A.R.T.
• Monitoring and Oversight
• Tackling Big Questions
Learning Outcomes

• Understand the basic steps to creating a strategic oversight and monitoring plan (Strategic Planning) and tools
• Identify common data points, data sources, and stakeholder input groups helpful to decision making
• Strategic Planning
  ✓ Define your priorities
  ✓ Clearly outline goals and objectives with a completion timeline (SMART goals)
  ✓ Identify concrete outcomes aligned to your mission
  ✓ Identify who is responsible and can impact certain goals and outcomes
Strategic Planning Central Questions

- What is our current reality?
- What are we ultimately working towards?
- What are the specific outcomes we aim to achieve?
- What is standing in our way?
- What actions do we need to take in order to get there?
- How will we measure our progress?
Strategic Planning Recap

Set mission-aligned S.M.A.R.T. goals:

➤ **Specific**: A specific goal has a much greater chance of being accomplished than a general goal.

➤ **Measurable**: A clear criteria for measuring progress toward attainment of each goal set should be established.

➤ **Attainable**: Goals that are important to the organization are easy to figure out how to make them come true.

➤ **Realistic**: Realistic goals represent an objective toward which the organization is both willing and able to work.

➤ **Time-Bound**: A goal should be time-bound. Deadlines too far in the future are easy to put off, goals set too close tend to be unrealistic and have little success.
Monitoring & Oversight

• Oversight and Monitoring
  ➢ Gather input and feedback along with data and observations
    • Parents, teachers, students, community members
  ➢ Use the balanced scorecard approach
    • Measure a variety of things from internal processes to external outcomes
  ➢ Check-in on progress at every meeting
  ➢ Establish a committee structure
### Monitoring & Strategic Planning

Data on performance, perception, demographics, and process should be used when developing strategic plan.

<table>
<thead>
<tr>
<th>Academic</th>
<th>Financial</th>
<th>Operational/Govern.</th>
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<tbody>
<tr>
<td>EOG/EOC Results</td>
<td>Financial Statements</td>
<td>Student</td>
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<td>EVAAS Projections</td>
<td>Balance Sheets</td>
<td>Enrollment/ADM</td>
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<tr>
<td>Benchmark Results</td>
<td>Budget (Actual/Projected)</td>
<td>Transportation Routes</td>
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<tr>
<td>ACT/SAT Data</td>
<td>Cash Flow Projections</td>
<td>School Leader Eval.</td>
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<td>Read to Achieve Data</td>
<td>Expense Statements</td>
<td>Board Self-Study/Eval.</td>
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<td>Discipline Data</td>
<td>Fundraising</td>
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<td>EL Proficiency</td>
<td>Capital Expenditures</td>
<td>Traffic Studies</td>
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<td>EC Data</td>
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<td>Architectural Reports</td>
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Public Schools of North Carolina
“We’ll also need a DNA sample to test for hidden learning disabilities. We’re very selective, you know.”

“I’ve got no job, no prospects... just this crummy backyard shed.

Heck... you could start a charter school!”
Strategic Planning

- Mission & Vision

✓ Goal ⟷ Objective Strategy-Monitoring
   Benchmarks-Activities and Completers

“If I had an hour to solve a problem, I’d spend 55 minutes thinking about the problem and 5 minutes thinking about the solutions.” – Albert Einstein
Strategic Planning Cycle

1. Gather, review & analyze data
2. Identify & set goals
3. Select and define objectives for each goal
4. Determine strategies and monitoring benchmarks
5. Implementation and progress monitoring
6. Identify & set goals
7. Select and define objectives for each goal
8. Determine strategies and monitoring benchmarks
9. Implementation and progress monitoring
10. Gather, review & analyze data
Tackling Big Questions

1. What data, reports, or information will you need to begin answering your question? How will you go about getting that information?

2. Who/which stakeholder groups will you need to speak with? What processes will you use with these groups?

3. Which questions will you need to ask or answer?
Board of Directors
Governance Training
Scenarios

The Office of Charter Schools, NC DPI
2023
<table>
<thead>
<tr>
<th>Conflict of Interest?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>May Charter School X get a loan from Bank Y, even if a Board of Directors member is an Officer at Bank Y?</strong></td>
</tr>
<tr>
<td>Is it a good deal for the Charter School X?</td>
</tr>
<tr>
<td>Was full disclosure made?</td>
</tr>
<tr>
<td>What are Charter School X's alternative/options?</td>
</tr>
<tr>
<td>Part of the value of a BOD member is that her knowledge skills and connections may inure to the benefit of the school</td>
</tr>
<tr>
<td>Did the involved BOD member recuse herself? Was there any self-dealing? i.e. was a commission refused?</td>
</tr>
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</table>
The Ricardo Show

• Lucy & Ricky are a husband and wife founding team of Babaloo Charter School in NC. Lucy is the Executive Director and Ricky is a BOD member. It is time to discuss the evaluation of Lucy and the renewal of her employment contract. Ricky thinks she has been doing a marvelous job and deserves a raise.

• What should Ricky do?
• If Ricky recuses himself, can he discuss his wife’s raise with another BOD member?
• What other considerations does Ricky need to take into account (Charter Agreement, NC Charter Law, SBE policies)?
Lucy & the Chocolate Factory

- Babaloo Charter School is where Lucy is the Executive Director. Lucy has inherited her mother’s shuttered chocolate factory, which had been remodeled to accommodate commercial offices. Babaloo is a popular NC charter and its enrollment is growing quickly, necessitating a new facility. It just so happens that the chocolate factory is within five miles of the current location, in the same LEA, and is large enough to accommodate the school. Lucy believes that the chocolate factory would be a great permanent location for the school to purchase or long-term lease with only minor upfit needed.

- Can Lucy recommend to her BOD that Babaloo Charter consider locating at the chocolate factory?
- Can Ricky, a BOD member, and her husband, vote on the purchase or lease?
Babaloo Charter and the for-profit EMO

- A member of the BOD of Babaloo Charter School also works for the for-profit EMO National Babaloo Schools. Is this an inherent conflict of interest?

- Can the BOD member steer a contract for management towards the for-profit EMO National Babaloo Schools?

- Can another member of the BOD of Babaloo Charter School direct the business to the EMO National Babaloo Schools?

- Discuss any potential breach of loyalty or self-dealing? What/how could Babaloo Charter School do in advance to ‘sanitize’ this transaction in advance?

- The contract with National Babaloo Schools has a provision that termination of the management agreement would result in National Babaloo Schools retaining all school-related property.
Little Ricky

• Little Ricky, Lucy & Ricky’s son, attends Babaloo Charter and excels in his classes. Teachers believe he is eligible for Babaloo’s AIG Program. Lucy typically interviews students who have been recommended for the AIG program and makes the final decision on this.

• Can Lucy or Ricky participate in Little Ricky’s testing or admission into Babaloo’s AIG Program?
Lucy & Ricky are thrilled that Babaloo, in its third year of operation, is at capacity. All students from the last academic year have submitted intent to return forms. They know that applications will exceed seats available and that a lottery will be required. They plan to advertise their open admission period for a period of two calendar weeks; after all, they won’t have any trouble filling seats.

Should the BOD support this decision? Why or why not?
Fred & Ethel Charter School & the Software Scenario

• Fred is a BOD member of Ethel Charter School and the owner of a well-known educational software company. Ethel Charter School wishes to upgrade its software programs, estimated to cost several thousand dollars, and such a purchase requires BOD approval.

• Can Ethel Charter purchase Fred’s education software programs?
• Must multiple bids be solicited?
• Can Fred be involved in any way in the voting on this contract?
• What will your BOD need to consider?
Alternative Evaluation Instruments

In State Board Policy TCED-016, it is stated that a local board shall use the North Carolina Professional Teaching Standards (NCPTS) and North Carolina Educator Evaluation System (NCEES) unless it develops an alternative evaluation that is properly validated and that includes standards and criteria similar to those in the NCPTS and NCEES.

This is for Beginning Teachers Only

https://tinyurl.com/NCOCSValidationScoreCard
STEPS:

• Board approval, notify OCS
• Epicenter Task Assigned
  – Justification Letter
  – School AEI
  – Crosswalk Between AEI proposed and the NCEES instrument
• OCS scores and notifies school and Office of Teacher Effectiveness
• School sends crosswalk to their regional facilitator
QUESTIONS?

Darian C. Jones, Ph.D.
Education Planning & Development Consultant
Office of Charter Schools
Darian.jones@dpi.nc.gov
Charter Schools Performance Framework QA Deep Dive

NC Office of Charter Schools
Joseph Letterio Maimone, Education Consultant
The North Carolina Charter School Performance Framework

1. Introduction and Philosophy
2. Submission and Review Process
3. Items not reviewed by OCS
4. Items reviewed by OCS
5. Follow up Q&A survey
PF 5-Ws

- **Who** - All currently operating schools are required to participate in the annual Performance Framework. The Office of Charter Schools staff provides thoughtful and responsive guidance throughout the year.

- **What** - The Performance Framework consists of several indicators related to charter school operations, academics, finance, and governance.

- **When** - Document submissions for the 2021-22 Performance Framework will take place from September 2021 through April 2022. Final submissions are due June 30th each year.

- **Where** - Most documents are submitted via the Epicenter portal and evaluated by OCS. However, certain measures are collected and evaluated by divisions and agencies external to OCS. For example, measure A5 is collected by the various federal programs within DPI (EC, EL, etc.). Measure A17, Health and Safety Requirements, is collected and evaluated by the Department of Health and Human Services.

- **Why** - The Performance Framework is an accountability measure and it is a tool to help us keep you, the school, out of trouble so you can focus on educating students!
There’s more on the web!

Measures not determined by OCS

- A2. The school has an assigned administrator in the Education Value-Added Assessment System (EVAAS).
- A3. The school meets the required number of instructional hours or days in accordance with State law.
- A4. The school adheres to all testing and accountability policies for state assessments.
- A5. The school implements mandated programming as a result of state or federal requirements. Title I, Title II, EC, Nutrition, EL/MLL.
- A7. The school's official funded ADM is within 10% of the projected ADM.
- A17. The school is compliant with all student health and safety requirements as defined in general statute, SBE policy, or the signed charter agreement.
- A18. The school is compliant with teacher licensure percentage requirements by maintaining at least 50% of teachers licensed from December 31 through the end of the school calendar year in accordance with SBE policy.
Annual OCS Reviewed Items

- A01.1 – School Performance Score and Letter Grade
- A01.2 – Parent Letter for Schools with D or F
- A06.1 – Board Admissions and Enrollment Policy
- A06.2 – Lottery Application
- A08.1 – Parent Grievance Policy
- A08.2 – Employee Grievance Policy
- A09 – Board Conflict of Interest Policy
- A10 – Nepotism Policy
- A11 – Board Meeting Schedule
- A12 – Board Membership List
- A13 – Fire, OSHA, and Other Required Health or Safety Inspections
- A14 – Certificate of Occupancy
- A15 – Civil and Liability Insurance Certificate
- A16 – Board Criminal History Check Policy
- A19 – EMO/CMO Public Records Request
- A20 – NC Retirement System Dissolution Funds
- A21 – School Improvement Plan
Renewal Year OCS Review

• B1 – Graduation Requirements
• B2 – Student Promotion Requirements
• B3 - Mission Implementation
• B4 - Adherence to By-Laws
• B5 - Open Meetings
• B6 - Public Records Requests
• B7 – Board Student Discipline Policy
Academic Measures

• Proficiency Status
• Growth Status
  • LP/CLP Status
  • Reading and Math Grade
• Comparability of GLP and CCR
• Comparability of Demographic Groups; Female, Male, Black, White, Hispanic, Asian, American Indian, Economically Disadvantaged, Exceptional Children
A01.1 – School Performance Score and Letter Grade

**Submission Due Date:** March 31

**Applicable Schools:** Schools currently operating in Year 2+ (including those designated under the Alternative Accountability Model). Not applicable to the new charter schools who opened in the current year.

**Description:** The overall School Performance Score and Letter Grade must be prominently displayed on the school’s website in accordance with G.S. 115C-218.65.

**Submission Instructions:**

1. Please provide a screenshot of the overall School Performance Score and Letter Grade for the current and previous four school years displayed on the school’s website.
2. In the narrative box below, please copy and paste the URL for the page on the school’s website that contains the school performance score and letter grade display.

Schools operating in year 1 will not have accountability data for the previous school year. If your school is operating in year 1, please state that in the narrative box below and submit.

**Reference(s):** [G.S. 115C-218.65](#)

**Criteria:** The school performance score and letter grade earned for the following years are prominently displayed on the school’s website, as evidenced through the screenshot and the URL link provided: **Current Year: Prior Year 1: Prior Year 2: Prior Year 3: Prior Year 4:**
A01.2 – Parent Letter for Schools with D or F

Submission Due Date: January 31

Applicable Schools: Schools that earned a D or F according to the prior year Accountability Data. *This submission task has been assigned to those schools only.

Description: Schools receiving a D or F for the school year, provide a copy of the letter sent to parents to notify them of the school’s Letter Grade.

Submission Instructions: Please provide a copy of the letter sent/to be sent to parents to notify them of the school’s Letter Grade. At a minimum, the letter should contain the date of distribution to parents and the letter grade earned for the last concluded school year.

Reference(s): [G.S. 115C-218.65](#)

Criteria: A parent letter was provided that contains a date range between the release of accountability data in October and the due date of March 31. The letter, at a minimum, should contain the letter grade earned during the prior school year.
A06.1 – Board Admissions and Enrollment Policy

Submission Due Date: November 30
Description: The school follows student admissions and lottery requirements as stated in North Carolina General Statute, State Board of Education Policy, and the signed charter agreement.
Submission Instructions: If this item was deemed compliant in a previous year’s Performance Framework and has not been amended please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide the current board admissions and enrollment policy.

Reference(s): G.S. 115C-218.45, CHTR-003, Section 7 of the Charter Agreement, General Checklist for A6

Criteria: The board policy provided is up-to-date, comprehensive, transparent, and accurately applies requirements from law.
A06.2 – Lottery Application

**Submission Due Date:** November 30

**Description:** The school follows student admissions and lottery requirements as stated in North Carolina General Statute, State Board of Education Policy, and the signed charter agreement.

**Submission Instructions:** Please provide the Lottery Application to be used during the current/upcoming open enrollment period for student admittance in the upcoming academic year. The lottery application provided should align with content provided in the Board Admissions and Enrollment Policy. If the actual application is not available yet, please submit documentation of all the questions that are going to be asked on the application.

**Reference(s):** G.S. 115C-218.45, General Checklist for A6, Sample Lottery Application

**Criteria:** The lottery application provided is for student admission into the school for the next school year. The lottery application should not contain any prohibitive or non-essential question fields. The enrollment packet, not the application, is the proper place for more detailed questions.
A08.1 – Parent Grievance Policy

Submission Due Date: April 30

Description: The non-profit board has a current grievance policy for parents.

Submission Instructions: If this item was deemed compliant in a previous year’s Performance Framework and has not been amended please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide the board’s current grievance policy for parents.

Reference(s): CHTR-006

Criteria: The grievance policy contains the following, at a minimum:

- Transparent and clear steps for the grievant to act upon throughout the process.
- A logical “chain of command” for the grievant to bring his/her concern in order to have it addressed.
- A timeline at each step in the process.
- A step within the process (usually the final step) that allows the grievant to bring his/her concern to the governing board of directors for an investigation and final decision.
- If the grievant has a concern with the lead administrator, the policy should include a process for how that concern can be addressed.
A08.2 – Employee Grievance Policy

Submission Due Date: April 30

Description: The non-profit board has a current grievance policy for employees.

Submission Instructions: If this item was deemed compliant in the 2019-2020 Performance Framework and has not been amended, please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide the board’s current grievance policy for employees.

Reference(s): CHTR-006

Criteria: The grievance policy contains the following, at a minimum:

- Transparent and clear steps for the grievant to act upon throughout the process.
- A logical “chain of command” for the grievant to bring his/her concern in order to have it addressed.
- A timeline at each step in the process.
- A step within the process (usually the final step) that allows the grievant to bring his/her concern to the governing board of directors for an investigation and final decision.
- If the grievant has a concern with the lead administrator, the policy should include a process for how that concern can be addressed.
A09 – Board Conflict of Interest Policy

Submission Due Date: January 31
Description: The non-profit board has a current Conflict of Interest Policy that complies with G.S. 115C-218.15 and the most recent charter agreement.
Submission Instructions: If this item was deemed compliant in a previous year’s Performance Framework and has not been amended please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide the board’s current Conflict of Interest Policy.

Reference(s): G.S. 115C-218.15 and Section 4 of the Charter Agreement

Criteria: The board policy provided is up-to-date, transparent, and accurately applies General Statute and requirements from the charter agreement.
A10 – Nepotism Policy

Submission Due Date: March 31

Description: The non-profit board has a current nepotism policy that complies with G.S. 115C-218.15 and the most recent charter agreement.

Submission Instructions: If this item was deemed compliant in a previous year’s Performance Framework and has not been amended please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide the board’s current Nepotism Policy.

Reference(s): G.S. 115C-218.15 and Section 4 of the Charter Agreement

Criteria: The board policy provided is up-to-date, transparent, and accurately applies general statute and requirements from the charter agreement.
A11 – Board Meeting Schedule

Submission Due Date: November 30

Description: A quorum of the non-profit board of directors meets no less than 8 times during the fiscal year (may include an annual meeting).

Submission Instructions: Please provide the governing board’s meeting schedule for the fiscal year. List the date, time, location, and type of meeting (i.e. regular board meeting, special called meeting, annual meeting, etc). Please note that the fiscal year runs from July 1st of a given year through June 30th of the next year. The non-profit board of directors is required to meet no less than 8 times a year (including annual meeting).

Reference(s): CHTR-006

Criteria: A board meeting schedule is provided with dates that fall between July 1, FY start, and June 30, FY finish. The number of meetings on the schedule is no less than 8. The evidence submitted contains the information requested: date, time, location, and type of meeting.
A12 – Board Membership List

**Submission Due Date:** October 31

**Description:** The majority of the non-profit board members and 50% or greater of the board officers have primary residence in North Carolina.

**Submission Instructions:** Please provide the list of board members including the first and last name, board role, and the city and state of primary residence for each member. If the board has any ex-officio members, please ensure to clearly denote this on the membership list.

**Reference(s):** [Section 4 of the Charter Agreement](#)

**Criteria:** The board membership list includes the names, board role, and city and state of primary residence. Using this information, a compliant governing board will have the majority of all board members and 50% or more of board officers with a primary residence listed as the state of North Carolina.
A13 – Fire, OSHA, and Other Required Health or Safety Inspections

Submission Due Date: May 31

Description: There is evidence of current fire inspections and related records.

Submission Instructions: Please provide your most recent fire, OSHA, and any other required health or safety inspection completed by the municipality/county. The inspection/s must be official.

Reference(s): Section 14 of the Charter Agreement

Criteria: The evidence documents provided have inspection dates within the current academic calendar and show that the inspection was conducted by the municipality or county.

Note: The school must fix any areas that failed the inspection, but this PF Measure is met by having had the inspection.
A14 – Certificate of Occupancy

Submission Due Date: November 30

Description: The school has a viable certificate of occupancy or other required building use authorization.

Submission Instructions: If this item was deemed compliant in a previous year’s Performance Framework and no buildings have been added please submit the CO Verification note signed by the School Director and Board Chair. Otherwise, please provide your school’s Certificate of Occupancy for all new/moved into facilities. Each building please. This is about making sure students are learning in safe buildings sufficient for an educational environment.

Reference(s): G.S 115C-218.5(c) and Section 15 of the Charter Agreement

Criteria: The evidence documents provided have the following elements:
- Address listed on the Certificate of Occupancy matches the address listed in EDDIE
- Certificate(s) of Occupancy or other building use authorization indicates that the building/facility is for Educational Purposes.
- School submits all Certificates issued for the facility and any sub-campus facilities.
A15 – Civil and Liability Insurance Certificate

Submission Due Date: January 31

Description: The non-profit board holds current, active civil and liability insurance with the minimum coverage as defined in the most recent charter agreement.

Submission Instructions: Please provide your current, active Civil and Liability Insurance Certificate. The certificate of insurance should show minimum coverage as required by section 13 of the charter agreement. Note that the coverage term should be current and active.

Reference(s): G.S. 115C-218.20, CHTR-004, and Section 13 of the Charter Agreement

Criteria: The evidence document(s) provided have the following elements:

- Coverage dates that are current (basically Certificate has yet to expire).
  - Errors and Omissions: one million dollars ($1,000,000) per occurrence;
  - General Liability: one million dollars ($1,000,000) per occurrence;
  - Property Insurance: for owned building and contents, including boiler and machinery coverage, if owned;
  - Crime Coverage: no less than two hundred fifty thousand dollars ($250,000) to cover employee theft and dishonesty;
  - Automobile Liability: one million dollars ($1,000,000) per occurrence; and
  - Workers’ Compensation: as specified by Chapter 97 of NC General Statute, Workers’ Compensation Law.

- Certificate names the SBE as an additional insured.
- The amounts indicate “per occurrence” when required above.
A16 – Board Criminal History Check Policy

Submission Due Date: February 28

Description: The non-profit board has a criminal history check policy that mirrors the LEA in which the school is located.

Submission Instructions: If this item was deemed compliant in a previous year's Performance Framework and has not been amended, AND the LEA Policy has not changed, please submit the Policy Verification note signed by the School Director and Board Chair. Otherwise, please provide your current Board Criminal History Check Policy that complies with G.S. 115C-218.90.

Reference(s): G.S. 115C-218.90 and Section 22 of the Charter Agreement

Criteria: The board policy provided is up-to-date, transparent, and accurately applies General Statute and requirements from the charter agreement.
A19 – EMO/CMO Public Records Request

Submission Due Date: February 28

Description: The charter school is compliant with the annual EMO/CMO public records request.

Submission Instructions: Please combine the items below and submit as one document. If your school is not contracted with an EMO/CMO please state that in the Narrative box below and submit, you do not need to provide any documentation if your school does not work with an EMO/CMO.

1) A list of all employees paid by EMO/CMO that are assigned to manage or work at the school. Minimum information for this item include: Name, Duties (brief description), and Annual Salary.

2) A budget/expenditure report that outlines each year of the contract. Minimum information for this item includes: Description of the activity, Budget amount (sum of which equals the contract total), prior year/current year expenditures.

Reference(s): Section 10 of the Charter Agreement and CHTR-021

Criteria: The evidence document(s) provided have the following elements:

1) A list of all employees paid by EMO/CMO that are assigned to manage or work at the school. Minimum information for this item includes: name, duties (brief description), and annual salary.

2) A budget/expenditure report that outlines each year of the contract. Minimum information for this item includes: description of the activity, budget amount (sum of which equals the contract total), prior year/current year expenditures.
A20 – NC Retirement System Dissolution Funds

Submission Due Date: October 31

Description: The charter school is compliant with maintaining the required dissolution funds per G.S. 115C-218.100.

Submission Instructions: If your school participates in the NC Retirement System, please provide evidence of maintaining the minimum $50,000 of funds in one or more of the following: an escrow account, a letter of credit, a bond, or a deed of trust.

If your school does not participate in the NC Retirement System, please state that in the Narrative box below and select submit.

Reference(s): G.S. 115C-218.100

Criteria: The evidence document(s) provided have the following elements:

- $50,000 minimum funds in one or more of the following ways – escrow account, letter of credit, bond, or deed of trust.
A21 – School Improvement Plan

Submission Due Date: March 31

Applicable Schools: Schools designated as Low-Performing or Continually Low-Performing per previous accountability data. All schools were scheduled to submit something for this task in Epicenter.

Description: The school is compliant with the implementation of a School Improvement Plan submitted through NC Star.

Submission Instructions: If your school has been identified as Low-Performing or Continually Low-Performing, please provide the School Improvement Plan submitted through NC Star.

If your school has not been identified as Low-Performing or Continually Low-Performing, please state that in the Narrative box below and select Submit.

Criteria: The evidence document provided is an updated school improvement plan through the NC Star system.
B1 – Graduation Requirements

Submission Due Date: April 30

Applicable Schools: Schools in year 1 of the renewal cycle that serve HS grades or are projected to serve HS grades.

Description: The school has graduation requirements that match the approved charter application or approved charter application amendments.

Submission Instructions: If your school serves high school seniors or is projected and approved to do so, please provide a complete list of credits and other requirements for high school graduation. If your school does not serve high school seniors and is not projected and approved to do so, please state that in the Narrative box below and select Submit. Note: This submission is required for schools in their first year of the renewal cycle.

Reference(s): Section 3.1 of the Charter Agreement

Criteria: The evidence document provided contains a list of graduation requirements and what is listed matches what is in the charter application or any approved amendments. The graduation requirements must also show evidence that the school offers Occupational Course of Study for students with disabilities. Note that this submission is required of schools currently serving high school grades or those that have been approved to serve high school grades.
B2 – Student Promotion Requirements

**Submission Due Date:** April 30

**Applicable Schools:** All schools in year 1 of the renewal cycle.

**Description:** The school has student promotion requirements that match the approved charter application or approved charter application amendments.

**Submission Instructions:** Please provide the school’s student promotion requirements for all grades served in the current school year.

**Reference(s):** [Section 3.1 of the Charter Agreement](#)

**Criteria:** The evidence document provided contains a list of promotion requirements for all grade levels served. The promotion requirements provided match the approved charter application or approved charter application amendments.

Verify grades served to ensure the school is providing requirements for all as requested. Check to see whether the requirements address students with disabilities.
B7 – Student Discipline Policy

**Submission Due Date:** April 30  
**Applicable Schools:** All schools in year 1 of the renewal cycle.  
**Description:** The school maintains a discipline policy that is compliant with state and federal law and that is consistent with the approved charter application and approved charter application amendments.

**Submission Instructions:** Please provide the Board’s Student Discipline Policy that includes discipline procedures for students with disabilities.

**Reference(s):** G.S. 115C-218.60, Chapter 115C – Article 27, Section 20 of the Charter Agreement

**Criteria:** The evidence document provided contains the discipline policy for students, including a process for students with disabilities, that aligns with state and federal law. The policy provided matches the information provided in the approved charter application or approved charter application amendments.

The policy should include discipline processes for students with disabilities and should comply with Article 27 of Chapter 115C of the General Statutes.
Would you like a follow up call to talk through any specific item or items?

- Please click and fill out this short Google Docs survey linked so we can follow up with you individually!
Questions, any time, ever...

Contact Information:
Mr. Joseph Letterio Maimone
Education Consultant
NC Office of Charter Schools
Joseph.Letterio@dpi.nc.gov
Or ocs@dpi.nc.gov
Next up!

- Application/Enrollment reports every month, starting in February through the opening and facility updates.
- March 2022/RTO1 resubmissions - insufficient rating requires a resubmission.
- May 2022 RTO2 due. EC items will be reviewed externally by the EC division.
- June CSAB meeting appearance for all schools.
- Governance Strengthening Exercises: See Epicenter RTO2 and the back of your Planning Year agendas. I hope you have been doing this homework throughout the year.
- New Charter School Leaders Institute June 7-8, 2023 - (Both the school leader and at least one board member are required to be in attendance full time both days. This will be held at NC DPI) • July 1, 2023 - Charter Agreement Begins July, 2023 – Enrollment Report #4 Due (includes facility update) Failure to attend means you will not be recommended for successful completion of the Planning Year.
Participant Survey

Participant Feedback | Planning
Year Session 5
# Guidelines for CSAB RTO Decision-Making

<table>
<thead>
<tr>
<th>Issue</th>
<th>Minimum Standard</th>
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<tbody>
<tr>
<td>Enrollment</td>
<td>75% of projected enrollment by June 1st</td>
</tr>
</tbody>
</table>
| Facility             | • Substantial progress toward attaining Certificate of Occupancy for Educational Use 30 days before opening day  
                        | • Valid comprehensive contingency plan in place 60 days before opening day       |
| Budget               | Valid budget reflecting break-even number by June 1st                             |
| RTO Progress Report  | All evidence checklist categories rated as emerging or quality (no insufficient ratings) |