



### Application Preliminary Evaluation Packet

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

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

#### Subcommittee Members:

Cheryl Turner  
Joe Maimone  
Carol Ann Hudgens  
Kathryn Mullen Upton  
Becky Taylor  
Eric Sanchez  
Helen Nance  
Mike McLaughlin  
Alex Quigley  
Sherry Reeves  
Kristen Vandawalker  
Tammi Sutton  
Darrell Johnson  
Alan Hawkes  
Steven Walker  
Phyllis Gibbs

#### Date of Review:

Charlotte Classical School - Charlotte Classical School will partner with parents to prepare students to be lifelong learners and responsible citizens through an emphasis on literacy, critical thinking, and problem solving.

10/23/2014



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **Charlotte Classical School**

**Public charter schools opening the fall of 2016**

**Due by 5:00 pm, September 26, 2014**

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

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

**CHARTER SCHOOL**  
**2014 Application Process**  
**To open a charter school in the 2016-2017 school year**

**APPLICATION DUE DATE/TIME**

**September 26, 2014** A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

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

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

**APPLICATION SPECIFICATIONS**

Applicants can submit applications prior to the deadline September 26, 2014 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

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

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## **I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: Charlotte Classical School

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

Name of non-profit organization under which charter will be organized or operated: *Charlotte Classical School*

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

Name of contact person: *Cynthia Roeth*

Title/Relationship to nonprofit: *Board Chairman*

Mailing address: 3932 Ayrshire Place  
Charlotte NC 28210

Primary telephone: 704-643-5401 Alternative telephone: 336-423-6614

E-Mail address: chroeth@aol.com

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

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

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

No:

Yes:

If so, provide the name of the third party person or group. NC Public Charter Schools Association (NCPCSA)

List the fee provided to the third party person or group. \$24,000

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

The NCPCSA provided guidance, advice, resources, administrative assistance,

Charlotte Classical School - Charlotte Classical School will partner with parents to prepare students to be lifelong learners and responsible citizens through an emphasis on literacy, critical thinking, and problem solving.

and editing for this application, including the previous year's application of Bastiat Classical School (Bastiat). Articles of Amendment to change the corporate name from Bastiat to Charlotte Classical School (CCS) were filed this year. It should be pointed out that certain of the board's plans expressed in this application were also in the previous Bastiat application. However, most of the application submitted herein has been redesigned by the board to improve the application and increase the probability of opening and sustaining a high quality public charter school.

The mission, vision, and ideas contained in the application are the board's. The NCPCSA will provide guidance and assistance to the CCS board through the evaluation and interview process and CSAB approval. Subsequently, and until State Board of Education (SBE) approval, the NCPCSA will help with marketing, including helping design and implement presentations for prospective parent meetings, designing and driving social media, assisting with public relations including press releases, continuing the development of employee policies including head of school search, and attendance at all board meetings.

The fee will be provided to NCPCSA only upon the successful opening of a charter school in 2016. Assistance under the contract continues through the State Board of Education approval, however it is understood that support through the school opening and its first year of operation is available on an as requested basis.

While the vast majority of this application's content was written by the CCS, there is language and terminology that the NCPCSA assisted with and which may appear in other charter school applications. That content is therefore original source content of this applicant when provided by the NCPCSA.

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

No:

Yes:

*Submit the following evidences (Appendix A) to support the conversion of the traditional public to a charter school:*

- *Statement of Support signed by the majority of the teachers and instructional support personnel currently employed at the school*
- *List of current staff receiving compensation from the traditional public school*
- *Current school enrollment*
- *Parent support of the conversion*

*Outline the 3 year financial history of the proposed converted charter school in the chart below and attach the past 3 year tax returns.*

<i>Financial History YR2011</i>	<i>Financial History YR2012</i>	<i>Financial History YR2013</i>
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*Is this application being submitted as a replication of a current charter school model?*

No:

Yes:

*What is the name of the nonprofit organization that governs this charter school?* Charlotte Classical School

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

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

Projected School Opening: Year 2016 Month August

Will this school operate on a year round schedule?

No:  X

Yes:

Proposed Grade Levels Served and Total Student Enrollment (5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03	314
Second Year	K,01,02,03,04	392
Third Year	K,01,02,03,04,05	470
Fourth Year	K,01,02,03,04,05,06	548
Fifth Year	K,01,02,03,04,05,06,07	626

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

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

nccharter2016  
Signature

Board Chair  
Title

nccharter2016  
Printed Name

09/26/2014  
Date



<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>It appears that the applicant is admitting plagiarism.</u>	<u>Kristen Vandawalker</u>	<u>Cover Page</u>
<u>Appendix A1 indicates that over almost 70 percent of over 300 survey respondents indicates that they would apply and enroll their children at the proposed school.</u>	<u>Kathryn Mullen Upton</u>	<u>Grade Levels</u>
<u>Not sure if the proposed figures are tactical and realistic for school due to the several charters already in this county. There are over 20 charter schools in Mecklenburg County.</u>	<u>Darrell Johnson</u>	<u>Grade Levels</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Cheryl Turner</u>	
<u>Joe Maimone</u>	
<u>Carol Ann Hudgens</u>	
<u>Kathryn Mullen Upton</u>	<u>Pass</u>
<u>Becky Taylor</u>	
<u>Eric Sanchez</u>	
<u>Helen Nance</u>	
<u>Mike McLaughlin</u>	
<u>Alex Quigley</u>	
<u>Sherry Reeves</u>	
<u>Kristen Vandawalker</u>	<u>Fail</u>
<u>Tammi Sutton</u>	
<u>Darrell Johnson</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	
<u>Phyllis Gibbs</u>	

## **II. MISSION and PURPOSES**

(No more than three total pages in this section)

### **Mission:**

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

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

Charlotte Classical School will partner with parents to prepare students to be lifelong learners and responsible citizens through an emphasis on literacy, critical thinking, and problem solving.

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

Charlotte Classical School's mission expresses a desire to instill in students a love of learning and a sense of responsibility that will stay with them throughout their lives. At the center of those goals is a partnership with parents. Parental involvement will permeate all areas of the school, including governance, operations, and academic. The focus on literacy, critical thinking, and problem solving will equip students with valuable knowledge, skills, and successes.

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

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

Charlotte Classical School (CCS) will serve all students who are eligible to attend public school in North Carolina. CCS will market the school to a geographically, ethnically, and financially diverse population with the intent of welcoming all students and reflecting the population of the county. CCS will not target a specific demographic or population, but will reach out to many different communities.

In order to try to reach a similar demographic makeup as Mecklenburg County, which is approximately 59% white, 32% African American, and 5% Asian, CCS will target its marketing to specific communities within and surrounding the targeted geographical area. CCS will provide lunches and a targeted bus service to students who qualify for free and reduced lunch services in an effort to make sure as many students as possible have the opportunity to enroll at CCS.

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

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The total projected enrollment for CCS, which will be reached at year 6, will be 706 students in K-8. That makes up less than 7/10 of 1% of Charlotte-Mecklenburg School's ADM for the same grade levels served.

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

Charlotte Classical School will use a traditional, classical, back to basics approach to education. This educational model stands in stark contrast to the trends that most district schools are pursuing. Instead of a personalized learning environment where each student is learning at his or her own pace, frequently on an electronic device, and the teacher's role is that of a facilitator, CCS will offer students a shared learning experience. While CCS will meet the needs of a wide range of students, each student will share a core of essential knowledge and experience. Students will be expected to engage with each other and with the teacher while studying, discussing, and working with content that is designed to equip each student with a base of knowledge that will help him or her be successful throughout high school, college, and life.

CCS will use Core Knowledge as the foundation of its educational program. With a cohesive, coherent, content-rich program, students will gain the basic background knowledge in the lower grades to let them develop the literacy, critical thinking skills, and problem solving abilities that will lead to success beyond their time at Charlotte Classical. Because students will be learning, discussing, writing about, and engaging with the same topics as their peers, students will develop a deeper appreciation for other people, their opinions, and their perspectives.

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

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

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

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

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Charlotte Classical School will thoroughly address several of the legislated purposes.

1. Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.

The classical model that CCS will follow will be very different from the professional opportunities that teachers have in surrounding schools. The trend in traditional, district schools is towards personalized learning where the teacher serves as a facilitator. The increasing use of technology in classrooms for individualizing instruction and flipping classrooms highlights this trend. By contrast, teachers at CCS will not be just facilitators, managing students who are learning with the use of tablets and computer programs, but CCS teachers will actually be tasked with imparting knowledge. CCS teachers will lead the students through discussions and activities. CCS teachers will teach, not just facilitate. CCS teachers will also serve on board committees and the School Improvement Team, act as mentors and coaches, and play an active role in decision making at Charlotte Classical. Teachers will also have different financial incentives that they cannot get in the surrounding district schools, as CCS will use a merit based system for awarding raises and bonuses.

3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.

Charlotte Classical High School will offer educational opportunities that are not like the surrounding district schools. Core Knowledge will anchor CCS's curriculum, providing students with a coherent, content-rich, structured, challenging curriculum. Students will work and learn together, building a powerful base of shared knowledge and community. Students will learn cursive handwriting and be expected to use it. Students will be required to memorize their multiplication facts, in addition to developing an understanding of what it means to multiply. CCS students will also participate in formal grammar lessons from K-8. With an emphasis on literacy, critical thinking, and problem solving in a traditional environment that also stresses parental involvement and character education, CCS will truly offer a different educational experience than the other schools in the area.

4. Improving student learning

The spiraling nature of the CCS curriculum will improve student learning. The Core Knowledge Sequence keeps revisiting topics in subsequent grades levels, but goes into them in a depth that is grade level appropriate. Students increase their understanding and retention as topics are covered multiple times. Cross-curricular connections are also important to the educational program at CCS. History, Language Arts, Music, PE, Science, and Spanish will all study topics at the same time to help students develop a deeper understanding of each unit.

Frequent assessments, including the NWEA, will give teachers important data that they will use to improve classroom instruction. Teachers will meet at least weekly in grade level PLCs to analyze student data and adjust instruction to improving student learning.

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

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

GOAL 1: The following percentage of CCS students will achieve more than one year's worth of growth in reading and math

Year 1: 80%

Year 2: 83%

Year 3: 86%

Year 4: 89%

Year 5: 92%

Measured by: student performance on NWEA MAP tests measured from fall to fall

GOAL 2: The following percentages of CCS students will achieve grade level proficiency in reading

Year 1: 57%

Year 2: 60%

Year 3: 63%

Year 4: 66%

Year 5: 69%

The following percentages of CCS students will achieve grade level proficiency in math

Year 1: 56%

Year 2: 59%

Year 3: 62%

Year 4: 65%

Year 5: 68%

Measured by: student performance on NWEA MAP tests measured from fall to fall

GOAL 3: CCS will meet or exceed the LEA's composite proficiency and will meet or exceed expected growth for the NC Accountability model

Measured by: student performance on the EOGs and EOCs

GOAL 4: Each year, 92% of CCS parents will be satisfied or highly satisfied with their child's school.

Measured by: parent responses on an annual parent satisfaction survey

GOAL 5: Each year, CCS students and staff will participate in weekly character education activities

Measured by: Observations, scheduled activities, monthly assemblies

The principal will provide a written, monthly report to the board at its monthly board meetings that includes data about the school's progress

towards all five of the school-wide goals. The principal will also generate an annual report each summer detailing, among other information, the school-wide goals, strategies that were used to meet them, data to show whether or not the goals were met, what the goals for the next year will be and how the school plans to meet them. The annual report will be communicated to the board, the staff, and the parents of students at the school.

The board will have access to the testing and survey data as soon as it becomes available. The School Improvement Team will analyze data and make recommendations to the board about any changes in strategies, goals, and resources necessary to ensure that CCS makes continual progress towards the achievement of its school-wide goals.

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

The school-wide goals have been designed to measure the pillars of the CCS mission: rigorous academics, character education, and parental involvement. The board will be made aware of the school's progress toward meeting its goals through periodic reports from the School Improvement Team, monthly reports from the principal, testing and survey data, and an annual report prepared by the principal.

Given all of the data available to it, the board will get a clear picture of how well the school is working towards meeting its school-wide goals which will be a reflection on how well the school is meeting its mission.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Mission is very general.	Kathryn Mullen Upton	Mission Stat
Not clear on the explanation of the mission statement: "Parental involvement will permeate all areas of the school, including governance, operations, and academic." What role would the parents role in the school's governance?	Darrell Johnson	Mission Stat
<p>What is the rationale for trying to "reach a similar demographic" to the county as a whole? Will the named services only be available to students eligible for FRL? Why would students who need bus service but are not FRL eligible be denied?</p> <p>Why will this educational method benefit a 21st century child?</p> <p>What is the rationale for not targeting a specific demographic or population?</p> <p>No actual evidence of need or demand is presented. the rationale for including waitlists for magnet schools is unclear, how are these schools comparable to the proposed charter?</p>	Kristen Vandawalker	Educational
<p>is it a HIGH school? a slip in the name of the school is a pretty significant error. No evidence is presented that the school will differ in any meaningful way from district schools, unless the cited personalized learning techniques are ubiquitous, which a quick google search doesn't support.</p>	Kristen Vandawalker	Purposes of
Number 3 indicates the school is a high school, while other materials indicate it's K-8.	Kathryn Mullen Upton	Purposes of
Proposed school mentioned "Charlotte Classical High School." Obviously an error because it later mentions K-8.	Darrell Johnson	Purposes of
<p>Goals are not expressed in SMART terms.</p> <p>VERIFY: are these the same as, or nearly the same as, UDS?</p> <p>What is "more than one year's growth?" E.g. is the national norm for RIT increase is 6 points, is 7 points what they want? or is it double digit growth? Why are they not measuring BOY to EOY?</p> <p>These goals seem with very low, especially in years where a majority of students are in primary grades and are therefore not entering multiple years behind. Why is "grade level proficiency" goal not 100%? What does grade level proficiency mean? Would goals this low get them over the bar on the charter or state performance framework?</p> <p>VERIFY: using "the LEA" seems to me indicative of a plagiarized section. If the applicants do not understand the important of performance goals how can they measure progress toward them or hold school leadership accountable for that progress or lack thereof?</p> <p>Goal 5 is not actually a goal. If character education is a part of your curriculum and weekly schedule, it does not rise to the level of a goal.</p> <p>The board being "aware of" school performance isn't sufficient. How and when will they act on this data? How will they be trained to understand it? What can or will they do to enact course correction if adequate progress isn't evident?</p> <p>There is no plan for action on the part of the board (monitoring required active participation, not passive receipt of information).</p>	Kristen Vandawalker	Goals for th
<p>While the growth goal is good, Goal 2 (reading and math proficiency), only calls for 69% proficient in reading and 68% proficient in math. Additionally, Goal 3 - meeting or exceeding the LEA's composite proficiency - may be low if the LEA is only at, for example, 50 percent. And, to the question of how much the proposed school would exceed the LEA remains (i.e, there's not a set target). Take together, these issues raise concern that goals may not be focused enough on improving student outcomes.</p> <p>Monthly monitoring process is very general.</p>	Kathryn Mullen Upton	Goals for th

Reviewer	Score
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Cheryl Turner	
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Darrell Johnson	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	



### **III. EDUCATION PLAN**

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

Charlotte Classical school is committed to meeting the needs of every student. CCS's instructional program will be anchored by the Core Knowledge curriculum which is aligned with the NC State Standards, and will be supported by Core Knowledge Language Arts program, Saxon Math, and Shurley English. Additional special classes in art, music, PE, and Spanish will round out the CCS instructional offerings.

The Core Knowledge curriculum is a comprehensive, coherent, content-rich program designed to provide students with a solid base of background knowledge. The specificity of the Core Knowledge content helps eliminate gaps and repetition. Students who come to CCS with limited knowledge and experiences will be exposed to rich and varied texts and in-depth historical profiles that will broaden their understanding of the world around them. Students who already have a broad base of knowledge will find that the Core Knowledge sequence allows them to experience the material in a new way, opening them up to new perspectives and deeper comprehension. Cross-curricular connections resulting from content alignment across disciplines will help all students comprehend and retain subject matter. Specials teachers, especially in art, music, and Spanish, will align lessons with language arts and history topics to maximize these connections.

The Core Knowledge Language Arts program will be used to teach students the fundamentals of reading. A phonics based approach emphasizes phonics and listening comprehension, which surpasses reading comprehension in the elementary grades. The use of frequent read-alouds will allow students to access content and knowledge well beyond each student's ability to comprehend what they are able to read themselves. Core Knowledge Language Arts aligns seamlessly with the Core Knowledge sequence to provide students increased cross-curricular connections that reinforce learning objectives.

Shurley English will be used to teach students the basics of grammar, syntax, and sentence structure. The Shurley method engages students through songs and jingles, but is structured to provide a coherent approach to the subject, ensuring continuity of instruction.

Using Saxon Math, students will learn in a way that continually reinforces previously mastered concepts. This spiraling of instruction reduces gaps in knowledge and competencies and also allows students to experience success on a regular basis, even if they struggle with a new concept.

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Charlotte Classical teachers will be able to use many methodologies, allowing teachers to use best practices and teach with confidence. Each student is a unique individual and may process information in different ways. Using a variety of teaching techniques will help reach each student in the way that he or she learns best. Teaching methods that CCS teachers may use include but are not limited to direct instruction, experiential learning, collaborative learning, and directed independent study.

To aid in the evaluation of student performance and competencies, CCS will administer the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) two or three times per year for students in grades 2-8. For grades K-1, CCS will administer the NWEA MAP for primary grades. The NWEA MAP is a computer adaptive assessment that gives teachers specific feedback about the content areas that need further development. Teachers will evaluate and analyze the NWEA data and use their conclusions to inform their instruction. Working in their Professional Learning Communities (PLCs), teachers will collaborate on best practices and instructional strategies to address deficiencies in student understanding.

### **Curriculum and Instructional Design:**

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

The Charlotte Classical learning environment will be traditional, in keeping with its classical design. Students in K-5 will be taught in self-contained classrooms with one teacher. Kindergarten classrooms will have 20 students while 1-5 grades will have 26 students per classroom.

In middle school, students will be grouped by subject, and in some cases by ability. Students will generally learn in one classroom with one teacher. The average class size in grades 6-8 will be 26, however, class size may vary depending on student interest, placement, and course offerings. Students in the middle school will change classes and therefore have multiple teachers over the course of the day.

Provide a synopsis of the planned curriculum, including:

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

Core Knowledge is aligned with the NC Common Core State Standards. Its comprehensive content and focus on history will support the mission of CCS to develop good citizens. Students will leave CCS with the skills and information they need to be contributing, responsible members of society. The rich and specific content of the Core Knowledge sequence supports the

classical learning model of the grammar stage where students are to acquire the knowledge and information that will help them later when they are learning to synthesize what they know in a logical, comprehensible way through the dialectic stage and then when they are learning ways to express what they know and understand in the rhetoric stage. Saxon math will ensure that each student has a solid foundation of math skills that are essential for developing critical thinking and problem solving skills.

As CCS plans to have a diverse student population, with varied backgrounds and experiences, Core Knowledge will benefit all the students of CCS. The coherent, content rich sequence, and frequent read alouds help ensure even students with limited language experience and vocabularies will thrive in an academic environment. At the same time, students who come to CCS with a solid foundation of knowledge and experiences will learn more about each subject and be able to explore topics in great depth. The spiraling nature of the Saxon Math curriculum will give struggling students multiple exposures to many topics, helping them retain information and develop a deeper understanding each time a topic is revisited.

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

While the content and sequence of Core Knowledge is regimented, it lends itself to a wide variety of instructional methodologies that will allow teachers the freedom to use the method that best reaches each student. CCS teachers will use a variety of instructional strategies including but not limited to direct instruction, socratic method, experiential learning, collaborative learning, and directed independent study. Teachers will also receive training in classroom differentiation and best practices for remediating students who are struggling.

Core Knowledge provides resources for teachers to help them address the needs of students with a wide range of differences and abilities. Teacher will also receive extensive professional development in instructional methods, allowing them to adjust their lesson plans and instruction to ensure each student's success.

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

CCS will use multiple strategies to ensure that each student will be prepared to transition to the next grade level.

1. A comprehensive, coherent curriculum will be used with fidelity, along with common planning in PLCs and common assessments across the grade levels. While students will still have a wide range of abilities and competencies, they will arrive at the next grade level having been exposed to the same, predictable material, giving teachers a more complete picture of what the students already know at the beginning of the year.

2. A multitude of assessment strategies will be used to gauge student learning and adjust instruction throughout the course of the year. Students will be given the NWEA MAP two or three times per year; teachers will use frequent formative assessments throughout lessons to inform daily instruction; and grade level teams will plan together and use common

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assessments, analyzing data in PLCs, to improve instruction and student learning.

3. Strategies will be in place to identify and remediate students who are struggling. Teachers will provide individualized tutoring at specified times before and after school, older students will be encouraged to provide peer tutoring and support as part of their character education, and parent volunteers will be used to encourage and help students by providing classroom assistance during group or center time.

4. Students who need more than a little help will be referred to the School Support Team by teachers, parents, or other staff. The SST will work with each referred family to get help for each student in order to reach his or her potential through classroom interventions, alternate instructional strategies, referral to contracted specialists, or referral to the Exceptional Children team.

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

The Charlotte Classical calendar will help foster the partnership with parents and help achieve academic excellence. When possible, the calendar will be aligned with Charlotte-Mecklenburg Schools, allowing parents with children in more than one school to more easily coordinate activities. There are four half days scheduled, two after the first quarter and two after the third quarter, to allow time for teachers to meet with all of the parents.

CCS's calendar has a full 185 days that is designed to maximize instruction time and lead to higher student achievement. There are also professional development days scheduled at the beginning of the year and throughout the year. Training will be scheduled to strengthen teachers' instructional practices and strategies that will lead to improved student learning.

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

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

Charlotte Classical School will employ multiple strategies to ensure the success of all students. These strategies include tutoring, modifications to the learning environment, increased school-home communication, increased classroom attention, and possible intervention by the School Support Team (SST.)

When a teacher recognizes that a student is struggling, that teacher will communicate with the student and parents and make adjustments in the classroom. If the student continues to struggle, the teacher will schedule a meeting with the parent/ guardian and discuss what possible interventions

are needed. Teachers must not skip this step and must communicate these issues with the parent. The Powerschool Parent Portal will be used as one way for teachers to communicate with parents. Parents will be able to check their students' attendance and grades on a daily basis. To ensure that this is an effective form of communication, teachers will be required to update the online grade book at least on a weekly basis. Parents will be encouraged to check their child's attendance and grades online.

If a student continues to struggle in the classroom, the teacher or parent may refer the student to the School Support Team. After an initial evaluation, the SST will then develop appropriate research-based interventions for the classroom. If those interventions do not prove effective, the student will then be referred to the EC teachers to be evaluated for EC services.

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

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

A home language survey will be requested from every student at the beginning of each school year. ELL students may also be identified by classroom teachers or other school personnel.

When possible and appropriate, CCS will use an immersion model for students identified as English Language Learners. During the first year of operation, the curriculum coordinator will serve as the ELL coordinator. When the student population justifies the addition of an assistant principal, then he or she may take over the duties of ELL coordinator. It will be the responsibility of the ELL coordinator to:

1. ensure that the ELL student is able to fully participate in the school community
2. ensure timely and effective communication between the school and the parents of the ELL student
3. ensure the classroom teacher and specials teachers understand the ELL student's needs and make appropriate accommodations

If the immersion strategy is ineffective or otherwise inappropriate, other strategies will be used to address the needs of the student. These strategies may be pull-outs, providing educational material in the student's native language, tutoring, and the use of translators. Additional full or part time staff will be hired as needed to ensure that each student can fully participate and thrive in the social and academic environment at CCS.

*3. Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*

- a) Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
- b) Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

Charlotte Classical School's instructional program is inherently challenging

and carefully designed to provide students with a solid foundation of knowledge and skills necessary for future success. Though the rigorous instruction will adequately meet the needs of many gifted students, should students need a greater challenge, teachers will have the knowledge and flexibility to differentiate instruction to meet the needs of those students. Because the content and sequence of the Core Knowledge sequence is so important, even students who may be performing high above grade level will not be allowed to miss content. Instead, teachers will design lessons and assignments so that intellectually gifted students can be challenged while benefiting from the shared knowledge and experience of their peers. Strategies such as supplemental reading materials, challenge spelling words, individualized reading goals, and engaging projects will help students achieve academic growth no matter what level they are on.

The spiraling nature of the Saxon Math program makes it well suited for acceleration. Starting in 3rd grade, high achieving students will have the opportunity to accelerate their math and advance to the next grade level. This opportunity will ensure that the most gifted math students are challenged, without sacrificing a firm foundation of math skills. In the middle grades, students may be ability grouped for the purposes of accelerating the math instruction for capable and motivated students.

All students' progress will be assessed and monitored using a variety of methods, including the NWEA MAP, NC EOGs, and grade level common assessments. The teachers and principal will be held accountable for the growth and success of each student, and the School Improvement Team and the Board of Directors will continuously monitor the growth and achievement of different groups of students, including high performing students.

### **Exceptional Children**

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

### **Identification and Records**

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

As part of the enrollment packet that every student will be required to complete, parents will have the opportunity to provide information about

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their child's existing IEP or 504 plan. Additionally, EC staff will examine all records from previous schools as they are received to determine if enrolled students have existing IEPs or 504 plans. Upon identification of students with existing IEPs or 504 plans, CCS staff will alert teachers and administrators and ensure compliance with any existing plans.

To help identify students who may be eligible for special education services, a School Support Team (SST) will be established. The SST will be made up of teachers and administrators. Students may be referred to the SST by administrators, teachers, or parents. Once referred, the SST will make a preliminary evaluation and, with the support and agreement of the parents, make recommendations for either research-based classroom interventions or further formal evaluation. The formal evaluations may be conducted by EC staff or qualified personnel contracted for such purposes.

If classroom interventions put into place are found ineffective, the SST will re-evaluate and either put new interventions into place or determine if the student's needs will be best served by an IEP or other special education services. At all stages of the process the student's parents will be informed and consulted. The SST will continue to monitor all students determined to have special needs or need special assistance until such time as they are determined to no longer need special services.

All student records will be maintained with confidentiality and safety in mind. Records will be kept in secure, designated, locked records rooms, in fire-proof file cabinets. Student records may be examined on site only by approved personnel and should never be taken off site. A staff member will be designated by the principal to oversee the student records and ensure compliance with all applicable laws.

Records will be requested from the student's previous school only after a complete enrollment packet has been received. Upon receipt, student records will be securely stored and treated with strict confidentiality.

### Exceptional Children's Education Programming

1. *Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
2. *Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*
3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
4. *Describe the proposed plan for providing related services.*

Charlotte Classical School is committed to meeting the needs of all enrolled students. It will be the policy of CCS that every child have a fair and full opportunity to reach his or her full potential and that no child shall be excluded from appropriate educational offerings.

To ensure that the needs of exceptional children are met, CCS will have an Exceptional Children Department staffed with licensed, highly qualified, well-trained EC teachers. The EC department will be tasked with the screening of all students referred by the School Support Team (SST.) The EC department will further be responsible for developing educational plans and

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strategies for special needs students. The EC department will take every reasonable measure to prevent denials of equal educational opportunity on the basis of physical, emotional, or mental handicap; and will assure that the rights of students with special needs and their parents or guardians are protected.

The staff of CCS will be aware of students with an Individual Education Program (IEP) or a Section 504 Plan and make sure that all requirements are being met as prescribed. The IEP will be updated regularly and adjustments will be made to accommodate each student. An EC teacher, classroom teacher, parent, and administrator will be given proper notification and invited to attend all meetings. There will be ongoing assessments in classrooms to identify students with special needs. Students with a Section 504 Plan or identified as being eligible for a 504 plan will be offered accommodations and or services for the identified disability. Accommodations and services for both IEP and 504 plans will include but not be limited to: modification of tests and assignments, supplemental textbooks, adjusted seating, use of study guides and organizational tools, preferential seating, modified recess and PE, and use of necessary health care procedures.

The school plans to contract for related services such as speech-language, occupational therapy, and physical therapy with a company that has a proven track record and extensive experience with providing EC services to charter schools.

### **Student Performance Standards**

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

Charlotte Classical School will set high expectations for the students, staff, and the school as a whole. The student performance goals are: 80% of students in the first year will achieve more than one year's worth of growth in reading and math, 57% and 56% of students will achieve grade level proficiency in reading and math respectively, and CCS will meet or exceed Charlotte-Mecklenburg's composite proficiency and will meet or exceed expected growth for the NC accountability model. Because it is impossible to know where students will be academically when they enroll at CCS, these goals are based on the performance of other charter schools with similar programs and the projected enrollment based on the area targeted for a permanent site. The goals will be continually evaluated and revised when necessary by the board with recommendations from the School Improvement Team (SIT).

The NWEA MAP will be used in addition to the required state assessments to measure student achievement and inform instruction. Classroom teachers will



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use individual student data to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their Professional Learning Communities (PLCs) to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT will use school-wide testing results to make recommendations to the board about school-wide initiatives and programs designed to address deficiencies.

Students who meet or exceed the state standard requirements, where they exist, and have met all of the grade level requirements will automatically be promoted to the next grade. If a student is at risk of being retained, the student's classroom teacher will contact the parents as soon as possible. The teacher, parents, and other necessary staff will formulate a personal education plan which may include a referral to the SST. It will be the policy of CCS to give each student the tools and support that he or she needs to be successful. If the interventions and support do not result in the student meeting the requirements to be promoted to the next grade, the principal, with input from the teacher, parent, and other staff, will make the final decision on whether or not to retain the student.

If a student has either an IEP or a 504 plan, the decision to retain or promote that student will be made with the support of the EC staff and consideration will be given to the student's plan and accommodations.

All of the school policies and procedures, including promotion and retention policies, will be available to parents and students in the student handbook and on the school website.

The following are the exit requirements for students leaving 8th grade: students will demonstrate strong reading, writing, listening, spelling, speaking, and presentation skills using multiple forms of expression, which are age and grade level appropriate. Students will be able to read and interpret multiple forms of writing including poetry, fiction and non-fiction. Students will have an understanding of the U.S. government, its history, and governing documents. Students will have a basic understanding of the science topics as outlined in the North Carolina Standard Course of Study. Students will have mastered grade level and age appropriate math skills and be prepared to enter Math I in 9th grade.

With the help of NWEA MAP, students who are at risk of not meeting the objectives to successfully exit 8th grade will be identified early, usually in previous grades, and appropriate interventions will be put into place.

### **Student Conduct:**

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

*Provide a draft copy of the student handbook specific to the proposed charter school within the appendices (Appendix D).*

*Be sure to include:*

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

It is the goal of CCS to provide a safe and orderly environment for students, parents, and staff. To this end, CCS will set high behavior expectations for each student. Teachers will formulate, communicate, and model clear behavior expectations based on the idea that everyone should show kindness and respect. School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced.

The disciplinary process will consist of four levels:

Level 1: Most instances of misbehavior can be addressed by the classroom teacher and every teacher will receive training in classroom management and strategies to address inappropriate or disruptive behavior. Teachers will keep parents informed if their student's behavior is not meeting expectations. If misbehavior persists or rises to a Level 2 offense, then the classroom teacher will refer the student to the administration. Examples of Level 1 behavior include but are not limited to talking out of turn, refusal to participate, not cleaning up after making a mess.

Level 2: Repeated Level 1 behaviors or more serious misbehavior will result in a referral to the principal. The principal will meet with the student and parents to formulate a corrective action plan that may include disciplinary measures. Possible consequences of a Level 2 offense include but are not limited to after school detention, in-school suspension, writing reflections, and suspension from extra-curricular activities. Examples of Level 2 offenses include leaving class without permission, disrespect of authority, and non-compliance with dress code.

Level 3: If Level 2 misbehavior persists in spite of the corrective action plan or are more serious, the principal will meet with the student and the parents and formulate a corrective action plan that may include an out of school suspension of no more than 10 days. Examples of Level 4 offenses include disobeying school personnel, cheating, stealing, harassing others, and destruction of school property.

Level 4: If corrective action plans do not result in adjusted behavior, or if the misbehavior rises to a Level 4 offense, the principal will meet with the student and the parents and may recommend long term suspension or expulsion. Examples of Level 4 offenses are possession of drugs, threats to others, possessions of weapons, and assault.

A parent may appeal a Level 3 or Level 4 disciplinary action by submitting a written notice of appeal to the principal within 24 hours of being notified of the action. The principal will immediately notify the Board of Directors who will schedule a meeting to hear the appeal. The parents will be notified of the date, time, and place of the meeting and requested to attend. The decision of the Board regarding appeals of disciplinary

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measures will be final.

When considering discipline of students with special needs, the principal, with the help and consultation of the EC teacher, will review the student's file including his or her IEP or 504 plan. The principal will take into account any accommodations or interventions in place and whether or not the misbehavior is a manifestation of the student's disability, and work with the parents to ensure that all of the student's rights are protected.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
<p>While the narrative states that the academic design is classical, there are no classical elements detailed in this section. Rather, the narrative focuses on specific curricula (e.g., Core Knowledge, Saxon Math, Shurley English).</p> <p>Additionally, the narrative did not include documented evidence that the proposed approach will lead to improved student performance.</p>	Kathryn Mullen Upton	Instructiona
<p>I'm not sure how this all fits together as a "classical program." What is the rationale for selecting these specific curricular products? Clarify: Is the CK Sequence actually a curriculum? Have these products and the CK Sequence been used together with the trivvium successfully before? What is the rationale for the repeated assertion that students will come to CCS with knowledge or skill gaps? What types of gaps are rojected, and for which year one grade levels? thereafter, will the school be doing significant backfilling in later grades that would bring in new students at grades 1 and beyond who might have skill or knowledge gaps? The growth plan appears to indicate that new students will largely be added at K in years two and beyond. Clarify: what does this mean? "In middle school, students will be grouped by subject, and in some cases by ability. ...The average class size in grades 6-8 will be 26, however, class size may vary depending on student interest, placement, and course offerings." Clarify: Will students in grades 6-8 "learn in one classroom with one teacher," or "change classes and therefore have multiple teachers over the course of the day?"</p>	Kristen Vandawalker	Instructiona
<p>Confirm: are Shurley English, Saxon Math, and CKLA all NCCCSS aligned? I'm still not clear on what this "diverse student popouation" will look like. VERIFY: is the PD plan actually "extensive?" What is the rationale for the assumption that parents will have children in multiple schools? is this common in Charlotte? Overall this section lacks specific, concrete evidence. For example, what are the "resources for teachers to help them address the needs of students with a wide range of differences and abilities?" What are the strategies that "will be in place to identify and remediate students who are struggling?" How does CCS's calendar of "a full 185 days... maximize instruction time and lead to higher student achievement?" Is 5 PD days before the start of school sufficient time for teacher induction AND teacher and staff work to prepare the school/classrooms? This seems thin, many HQ schools have 2-3 weeks especially with their founding staff. Are there no teacher work days/PD/data days in Q2? Are the workdays in general aligned with the assessment schedule? Or are these only PLC days? Are there half days or PLS time during each week that are not addressed here? Is two teacher workdays at the end of school sufficient of year one? The scope and sequence seems thin. It is difficult to assess whether the applicant is prepared to develop curriculum/unit plans without knowing the sub topics that will be covered. Do the sub topics align with NC standards? Is the history curriculum culturally/current events relevant for a diverse student body? E.g., for today's students, schould African American history be addressed in earlier grades?</p>	Kristen Vandawalker	Curriculum a
<p>As noted above, there does not seem to be an emphasis on the "classical" elements of the academic design.</p>	Kathryn Mullen Upton	Curriculum a
<p>This section lacks concrete and specific evidence of a sound plan/system and does not demonstrate applicant capacity to identify and serve all students. What are examples of the research based interventions that will be employed? Is it typical for a parent to be able to refer to an SST? Who is on the SST? how do they work with parents in line with the mission? Are teachers compensated for tutoring? When does this happen? Are how are teacher/staff identifications of ELLs made? is it legal to make these types of identifications without evidence from an acceptabe test like WIDA? Is ELL experience a requirement for the role of curriculum coordinator? How will the school use "immersion model?" Will teachers be versed in this model? Are curricular materials available in anticipated ELL languages? What languages might</p>	Kristen Vandawalker	Special Prog

<p>be encountered? How wil ability grouping occur? will there be split grade classes if not enough gifted student for a full classroom are present in a specific grade?</p>		
<p>The narrative does not detail a clear system for identification, prevention or intervention. Broad approaches are referenced (e.g., increased home-school communication), but they do not demonstrate a sound plan.</p> <p>Similarly, the narrative did not discuss specific instructional programs that will be used with ELL students; rather, the approach the school plans to take was presented in broad strokes (e.g., immersion, pull-outs, tutoring).</p> <p>The plan to enhance the learning of gifted students appears to be at the discretion of the teacher, and essentially is a decision as to whether to accelerate that student's learning.</p>	Kathryn Mullen Upton	Special Prog
<p>This section lacks specificity. Confirm: the enrollment packet is provided to parents once they have accepted/been admitted to the school? What is the timeframe for identifying students with existing plans? How are determinations regarding exiting students from services made? who participates in/makes these decisions? How will records be safeguarded?</p>	Kristen Vandawalker	Exceptional
<p>Proposed school states, "As part of the enrollment packet that every student will be required to complete, parents will have the opportunity to provide information about their child's existing IEP or 504 plan." School can not ask questions concerning IEP and 504 in the initial enrollment packet.</p>	Darrell Johnson	Exceptional
<p>Responses include a description of accommodations, however; there are no references to the full continuum of services for students with disabilities. The applicant should consider the variety of settings and the direct services that may be required by students that enroll.</p>	Carol Ann Hudgens	Exceptional
<p>This section lacks specificity. Who are the members of the EC department? What other roles and duties must they fulfill at the school? How will students with profound or low incidence disabilities be served and access the general ed program? What does "every reasonable measure" mean? What would be an example of an unreasonable measure? Is it really sufficient to just invite people to SST meetings, or should they be scheduled around those key stakeholders who presumably are most familiar with the child. The actual educational plan for serving students with EC identifications is unclear. Do the named curricula have a track record of meeting the needs of EC students? what about ELL students?</p>	Kristen Vandawalker	Exceptional
<p>The plan outlined in the narrative is very general, and reflects IDEA basics. The narrative does not address how services to students with disabilities will look in a classical model. Question for interview: please describe what this model might look like when implemented (i.e., what does a typical day for a special needs student under this model look like)?</p>	Kathryn Mullen Upton	Exceptional
<p>What is the rationale for basing the goals on the performance of other charter schools? why not base on the schools CCS expects to pull students from? Clarify: are these goals based on published results only? for what assessment? has baseline data been examined? Clarify: why is it impossible to know where students will be? Is there a rationale for not making some baseline assumptions to develop a projected range of skill sets/achievement levels? Clarify, as above: how are "more than one year's growth" and "grade level proficiency" defined? What is the SIT? Who are its members? How and when will the goals be modified, and what role does the board have in this process? WHO collects and analyzes data for the PLCs? Are there non-negotiables regarding retention? Exit requirements are not addressed in SMART terms. what are "strong reading, writing, listening, spelling, speaking, and presentation skills using multiple forms of expression, which are age and grade level appropriate?" What is "an understanding of the U.S. government, its history, and governing documents?" Why is "basic" understanding of science topics?</p>	Kristen Vandawalker	Student Perf

Overall, these exit standards seem to set a low bar, lackin rigor and ambition. How will MAP scires identify students who are at rick of not graduating? Who is responsible for <u>modifying curriculum/instructional methods to address these gaps?</u>		
<p>The goal of 80 percent of students achieving 1+ year of growth is good; however, 57 percent proficient in reading and 56 percent proficient in math (and meeting or exceeding the district's composite proficiency) is not a rigorous goal that will lead to significantly improved student outcomes.</p> <p>The narrative states that NWEA MAP will be used, but provides little information on the feedback cycle to teachers. Additionally, it's unclear how many times MAP will be administered.</p> <p>Policies and standards for promotion are unclear. To be promoted, a student must meet state standard requirements, where they exist, and all grade level requirements. There is no detail on the grade level requirements, nor is any reference to promotion/retention included in the student handbook. (Note: the handbook submitted is for another school, Next Generation Academy, not Charlotte Classical School.)</p>	Kathryn Mullen Upton	Student Perf
<p>The code of conduct described in the narrative and the one included in the handbook for Next Generation Academy do not align. For example, level II offenses in the narrative (e.g., leaving class without permission, dress code) look significantly less serious than the level II offenses in the handbook (setting a fire, theft, robbery).</p> <p>There is no procedural detail specific to suspension or expulsion.</p>	Kathryn Mullen Upton	Student Cond
The applicant does reference the discipline of students with disabilities. It is recommended that the applicant review the NC Policies Governing Children with Disabilities with regard to the requirements of providing services when disciplinary removals result in a change in placement.	Carol Ann Hudgens	Student Cond
The handbook in Appendix D is for "New Generation Academy" ("NGA") not Charlotte Classical. Level four mentions possible expulsion. Note: 115C-390.11. Expulsion. (a) Upon recommendation of the superintendent, a local board of education may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff.	Darrell Johnson	Student Cond
<p>is the discipline policy set by the board or teachers? who is responsible for implementation and oversight? How will discipline be monitors by the board?                      Is dress code violation commonly in Level 2? Is this discipline plan in like with either Charlotte or state expectations?                      Does the board make decisions on suspensions or only expulsions? Is the decision made by the full board? how and when?                      This section does not address supporting positive behavior, or building a culture of "kindness and respect."                      What are the artifacts or rituals that will support these assertions: "School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced."                      How will staff be trained to implement consistently?                      The handbook presented is for "next generation academy." Attribution or explanation of why a handbook for CCS is not presented is present. This indicates potential lack of the applicant to develop and monitor school policies.</p>	Kristen Vandawalker	Student Cond

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Kristen Vandawalker	Fail

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Tammi Sutton	
Darrell Johnson	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

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

(No more than ten total pages in this section)

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

##### **Governance:**

##### **Private Nonprofit Corporation:**

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

*Name of Private Nonprofit:* Charlotte Classical School

*Mailing Address:* Cynthia Roeth

*City/State/Zip:* Charlotte NC 28210

*Street Address:* 3932 Ayrshire Place

*Phone:* 704-643-5401

*Fax:*

*Name of registered agent and address:* Judith Malveaux

5349 Magnolia Tree Lane

Charlotte, NC 28215

*FEDERAL TAX ID:* 46-4201593

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

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

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

X No

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

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

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

Please complete the table provided depicting the initial members of the nonprofit organization.

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these professional licenses?</b>
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Cara Jokell	Board Member	MECKLENBURG	Professor, UNC-Charlotte		
LaVonne Derksen	Treasurer	MECKLENBURG	CPA		
Judith Malveaux	Vice-Chairman	MECKLENBURG	Communication Consultant		
Cynthia Roeth	Chairman	MECKLENBURG	Swim Coach & Parent Consultant		
Jim Stegall	Secretary	UNION	Adjunct Instructor, Spanish		

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

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

Governance of the school is the direct responsibility of the Charlotte Classical Board of Directors, whose paramount goal is the educational success of its students. The Board will ultimately be responsible for the operations of the charter school including financial management, personnel, academic program, and facilities. The Board will be composed of 5 to 9 members, with at least one Board member being a parent or guardian of a CCS student. The CCS Board will supervise the principal who will be responsible for the day to day operation of the school. The Board will work through Board committees and in cooperation with the administration to set policies and develop programs and procedures that are in line with the school's mission and designed to meet the school-wide performance goals.

Each Board member will be expected to fully participate in the governance of CCS. Each board member will annually sign a conflict of interest statement and a board commitment statement. Each board member will support the school by serving on at least one board committee, participating in school events and activities, reviewing board materials, being familiar with North Carolina laws that apply to charter schools, and acting in the best interest of the students and the school.

The personnel committee will be tasked with recruiting the principal. The board will use a variety of methods to recruit the principal including advertising in local papers and websites, and college and university placement centers. The personnel will look for a candidate who, above all, will share the mission and the vision for CCS. The personnel committee will also develop an evaluation process for the principal and submit to the full board for approval. The board will formally evaluate the principal annually using the evaluation tools and processes that have been adopted by the board.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that*

*a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The board of CCS will be comprised of 5 to 9 members. There are currently 5 members. After enrollment starts, a parent will be added to the board to support the parental partnership that is a critical piece of the CCS mission. Each board member has knowledge and experience that will be beneficial to the governance and long term success of the school. The founding board includes community members with expertise in education, finance, facilities, and marketing. Most importantly, all of the board members share a passion for education, a devotion to the mission, and a common vision for Charlotte Classical School.

To ensure the academic and operational success of the school, the board will work together to make organizational and policy decisions. The board will be ultimately responsible for all operations of the charter school, but will delegate the day to day operations to the principal. To ensure that the best possible decisions are made, the board will participate in continuing board development and use proven best practices. The board will gather information from a variety of sources including the School Improvement Team, the Parent Teacher Organization, the administration, and surveys of parents, students, and staff. The board will get regular reports from the principal and the board committee that will keep them informed about all areas of school performance and will be used to help them make decisions.

The board personnel committee will develop an evaluation process for the principal that includes multiple performance indicators and is closely tied to the school's mission and goals. Based on the evaluation process, the board will formally evaluate the principal each spring. The principal's contract and compensation will be based at least in part on the annual evaluation.

Per the bylaws of CCS, at least one board member will be a parent or guardian of a CCS student. Other stakeholders, including other parents, staff, and students will have a variety of avenues to be active participants in the decision making process. There will be a public comment period at every regular board meeting and stakeholders will serve on board committees, the PTO, and the SIT.

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

Many of the current Charlotte Classical School board members also served on the board of Bastiat Classical School, a school that applied for a 2015 opening. The board has been strengthened with the addition of a CPA and another educator in order to better meet the governing needs of a new charter school. The board is currently full with seven members, but may expand to nine if talented, enthusiastic candidates are identified. One of the open spots is reserved for a parent of a student at CCS. After students have enrolled, the board will take applications from parents to be on the board. The governance committee will vet and interview potential board members and will make recommendations for new members to the full board.

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

The board will meet monthly at a day, time, and place designated by the

board.

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

New board members will be required to participate in the board's Orientation Plan. Key points of the plan include a primer on the charter, charter law, open meetings law, and public records law; attending at least one school community event; and observing in a classroom. Board members will be expected to participate in ongoing board development. The board may use a combination of training provided by the Office of Charter Schools, books, professional development coaches, and annual board retreats. A specific requirement for hours of board development for each board member will be laid out and agreed to in the Board Commitment Letter that each board member will sign.

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

Charlotte Classical School board members have a fiduciary responsibility to the school to not only avoid or disclose conflicts of interest, but to act in a manner that credits the board, the school, and the staff. Each board member will be required to sign a conflict of interest statement and annually disclose any conflicts or potential conflicts of interest.

When a conflict of interest occurs or may even appear to occur, the affected board member should advise the board before any vote or even discussion of the issue. Also, other board members have the obligation to bring before the board any potential conflicts even if the issue involves another board member. If, in the board's opinion a conflict exists, then the member affected shall not participate in any discussion or vote on the matter in question.

The board vice- chairman, Judith Malveaux, has volunteered with the NC Public Charter Schools Association, which has provided assistance with this application. As Ms. Malveaux does not draw a salary or any financial benefit from the NCPCSA, no real conflict exists. The board knows of no other potential conflict of interest at this time.

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

The CCS board will use a variety of information to aid the decision making process and policy development. New board policies, or revisions of existing policies will start in the appropriate board committee. If the policy does not originate in the governance committee, then the committee recommendation will then go to the governance committee. The governance committee will make a recommendation to the full board about whether a new policy is needed and what it should contain.

In making decisions, the board may consider recommendations from the administration, School Improvement Team, PTO, and board committees. Because important stakeholders are involved with all of these bodies, the board will effectively be getting input from all of the stakeholders. The board may also look at data including test scored, survey results, student performance statistics, community service performed, suspension rates, and reportable incident rates.

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Before being finalized and implemented, new board policies will be made public and the board will solicit input from parents and staff. The board will carefully consider any input received before voting on any new policies.

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

CCS will have a couple of important advisory bodies that will help the board in the governance of the school.

SIT: The School Improvement Team will be led by the principal and include other administrators, teachers representing each grade level and department, one board member, and at least three parents. The SIT will be responsible for developing and recommending amendments to the School Improvement Plan on an ongoing basis. They will meet at least once per month. The SIT will analyze, collect data, and make recommendations to the board in all areas of instructional programs, practices, and procedures.

PTO: The Parent/ Teacher Organization will operate as a separate organization sanctioned by the board.

The PTO will consist of parent officers, committee chairmen, the principal, assistant principal, and three teacher representatives. The PTO will help oversee and facilitate extracurricular, recreational, social, and community service activities of the school.

Both the SIT and the PTO will work collaboratively with the principal and school community and give monthly reports to the board of directors.

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

The staff grievance process, as outlined in the staff handbook, first calls for the staff member to bring up any problems with his or her immediate supervisor. If the issue is not resolved, the staff member will then outline the problem in writing and submit it to the principal. If the principal does not resolve the issue to the staff member's satisfaction, an appeal can be made to the personnel committee of the board. If the staff member is not satisfied with the results of the personnel committee, he or she may request a hearing of the full board of directors.

The grievance process for parents is similar. The parent must first take the issue to the staff member with whom the parent or student has an issue. If the issue is not resolved, a formal, written grievance may be submitted to the principal. If the principal is not able to resolve the issue, the parent may request a hearing before the full board of directors. At the hearing, the parent and/ or his or her representative will be given a chance to present the grievance.

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

### Include in the Appendices:

1. *A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix F)*

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2. *A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).*
3. *The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix H).*
4. *A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix I)*
5. *Copy of any board policies if adopted already (Appendix J).*
6. *Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).*

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

*If the proposed school does not intend to contract with an education service provider, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

**X Not Applicable**

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

**X Not Applicable**

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

**X Not Applicable**

### **Projected Staff:**

Outline below, a list of positions anticipated for the charter school; (e.g., principal or director; finance officer, administrative support staff; teachers (part-time and full-time); paraprofessionals/teaching assistants, clerical, and maintenance.). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings and align with the proposed budget.

Charlotte Classical School anticipates the following positions:

Principal

Assistant Principal (starting in year 2)

Finance Officer

Office Support

Custodian

Curriculum Coordinator

Core Content Teachers

Elective Teachers

Exceptional Children's Teachers

Teacher Assistants

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

Include the following information for the proposed charter school:

The board personnel committee will initially recruit qualified staff members. As soon as a principal has been identified, he or she will become a part of the recruiting and hiring process. Advertising for open positions will be done through the school website, social media, local newspapers, and

college and university placement centers.

CCS teachers will be professional, high performing teachers who have a strong belief in Charlotte Classical's mission. CCS will have a mentoring process that will allow experienced teachers to guide and mentor new teachers. CCS will offer an administrative team that supports the teacher in his or her pursuit of a safe and orderly environment. CCS will survey the staff at least once per year and use data from the survey to inform decisions. Teachers will be given a voice as stakeholders by having representatives on the School Improvement Team (SIT) and the Parent Teacher Organization (PTO). The principal and the board personnel committee will develop a clear, consistent rubric that will be used to make salary and bonus decisions and CCS will have a variety of high-quality and relevant professional development opportunities.

*2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board. Provide as Appendix O, a draft of the employment policies to be implemented by the proposed charter school.*

The employees of CCS will be employees of the board of directors. The board will hire and directly supervise the principal who will, with the help of other administrators when appropriate, directly supervise the other staff members. The board will approve all hires, position changes, terminations, staff policies, and staff procedures.

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

CCS will use a variety of methods to attract interested, qualified candidates; including but not limited to: open house format, word of mouth, and directly contacting distinguished teachers that would be a good fit. Once potential candidates are identified, the board personnel committee or the principal will further vet the candidates and make recommendations for interviews. The board personnel committee, the principal, and the principal's hiring committee will all interview candidates before the principal makes a recommendation to the board of directors for approval. The principal's hiring committee will consist of staff members and at least one parent. Upon approval of the board of directors, new hires will undergo a criminal background check. No candidate will be offered an unconditional offer of employment without passing a criminal background check.

The principal will be the direct supervisor of the staff. In that role, it will be his or her responsibility to notice any deficiencies in staff performance. Except for the most egregious offenses, the principal will use available resources at his or her disposal to remediate and develop the staff member so that expectations are met. Forms of development can range from small corrections to formal plans of improvement. Plans of improvement will include clear performance expectations, support that the staff member will be offered to meet those expectations, and a reasonable, definitive time frame for meeting those expectations. If, after being on a formal plan, the employee has still not demonstrated the expected improvement in performance, the principal may recommend the employee to the board for termination. The final decision to terminate an employee will belong to the board of directors. If an employee feels as though he or she has been wrongly terminated he or she may follow the formal grievance policy

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

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The following are average salaries that CCA expects to pay at each position. Actual salaries may vary slightly depending on education and experience.

Principal: \$73,000  
Assistant Principal: \$58,000  
Finance Officer: \$35,000  
Office Support: \$32,000  
Custodians: \$20,000  
Curriculum Coordinator: \$50,000  
Core Content Teachers: \$42,000  
Elective/ Specials Teachers: \$41,000  
EC Teachers: \$44,000  
Teacher Assistants: \$25,000

CCS will offer a full range of benefits to full time employees, including a retirement plan, life insurance, medical, long and short term disability, and dental plans. Some of the benefits will be offered to employees at the expense of CCS, while others will be offered as employee paid benefits.

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

The employee grievance policy will offer employees a process for resolving situations in which they feel they have been wronged. The first step in the grievance process is for the employee to speak to his or her immediate supervisor about the problem. If the issue is not resolved to the employee's satisfaction, a written grievance may be submitted to the principal. If the principal does not resolve the issue, the grievance will be submitted to the board personnel committee. If the committee does not resolve the issue, the employee may submit a written request for a hearing before the full board of directors.

The principal, as the direct supervisor of the employees, will have the responsibility to evaluate and develop employees. If, after an appropriate attempt to develop the staff member, the principal decides that the staff member is not a good fit for CCS, he or she will make a recommendation to the board for termination. The final decision to terminate an employee will rest with the board.

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

As a public charter school, many staff members at CCS may have dual roles and responsibilities. Some employees may be hired as part time employees and may hold positions outside of CCS. Any employees with dual roles and responsibilities will be funded completely out of the general operating budget.

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

The special needs population, including ELL students, has been estimated based on the experience of other similar charter schools and staffing for the anticipated EC population is provided for in the budget. CCS has budgeted for two EC starting in the first year. With an initial enrollment of 314 and estimating a 10% EC population, CCS expects approximately 31 EC students. Some EC services, such as speech therapy, occupational therapy, and psychological services will be contracted out to qualified professionals. The CCS budget reflects estimates for those services based on the same projected 10% EC population. The process for hiring qualified EC staff is the same that will be followed for hiring other staff members.

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Gifted students will be served by classroom teachers who have been trained in classroom differentiation and by a rigorous, challenging academic program.

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

**Principal:** The principal will be responsible for overseeing the day to day operations of the school. He or she will implement the policies approved by the board of directors and will, at the direction of the board, supervise the school staff and ensure the school's compliance with all applicable laws, SBE policies, and testing procedures. The principal must be committed to the mission of CCS and willing to work collaboratively to achieve the school-wide goals as set out in the application and the school improvement plan. Professional education experience and a master's degree in school administration is preferred.

**Assistant Principal:** The assistant principal will report to the principal and perform duties delegated to him or her by the principal. The assistant principal will fulfill the duties of the principal in his or her absence. The assistant principal must be committed to the mission of CCS and willing and able to work collaboratively to achieve the school-wide goals. Professional education experience and a relevant advanced degree is preferred.

**Finance Officer:** The finance officer will facilitate purchasing, invoicing, payroll, and inventory. He or she will have a bachelor's degree and experience in financial management.

**Office Support:** The office support personnel will be responsible for student data, attendance, communications, and oversight of office procedures. He or she will have a bachelor's degree.

**Custodian:** The custodian will clean the school as necessary and as directed by the principal.

**Curriculum Coordinator:** The curriculum coordinator will be responsible for supporting teachers in the implementation of Core Knowledge, Saxon Math, and Shurley English, as well as any other curricula approved by the board. He or she, with support and direction from the principal, will ensure that the CCS educational program is implemented with fidelity. He or she will support teachers in PLCs, serve on the board academic committee, and work with the Core Knowledge Foundation to coordinate evaluations and professional development that will support CCS in its efforts to become an official Core Knowledge school. He or she will have a bachelor's degree, will be committed to the mission and goals of CCS, and have relevant education experience.

**Teachers:** Teachers will be responsible for teaching the subject matter, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the CCS community. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Teachers must have the ability to become highly qualified in their subject area. Licensed teachers are preferred.



EC Teachers: EC teachers will be tasked with addressing the needs of students with special needs. EC teachers will provide continuing instruction and evaluation of students in the EC program. They will work closely with core subject teachers to ensure the needs of students receiving EC services are met. They will ensure compliance with all applicable laws and regulations. EC teachers will be licensed and highly qualified.

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

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

The principal will be ultimately responsible for maintaining teacher licensure requirements and coordinating professional development.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

The principal will be responsible for the professional development of all the staff, serving in effect as a mentor to all teachers and staff. Additionally, new teachers will be assigned experienced teachers to serve as mentors. Observations will be conducted in several different ways. The principal (or assistant) will conduct formal classroom observations at least once per quarter. These observations will be followed up with feedback in a post-observation meeting with the administrator. Additionally, an administrator will conduct informal walk-throughs at least twice per quarter. The principal will provide feedback from these informal observations in the form of a walk-through form that will be given to the teacher after the visit. For new teachers, mentors will also observe and provide feedback and support on a quarterly basis.

Retaining high quality teachers will be a priority for the administration and the board. Teachers will be surveyed once or twice per year. The survey results will be reported to the personnel committee and full board and will help inform the decisions that are made for the school's hiring committee, and various board committees. A teacher evaluation rubric will be developed and used for the annual teacher evaluations. Indicators will include parent surveys, NWEA scores in growth and proficiency, EOGs, NCEES data, parent satisfaction survey results, additional roles and responsibilities, and involvement with the CCS community. Scores from the rubrics will be used to determine annual raises and bonuses, if funds are available.

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

The staff development plan consists of three distinct kinds of development:

Formal: The formal, staff-wide development will be delivered internally, sometimes by an administrator and sometimes by someone brought in with expertise on a specific topic. Formal development will include most of the before school professional development days and will also occur during many teacher work days and monthly staff meetings.

Individual: Individual professional development includes external, subject-

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specific training. For new teachers, mentors will provide valuable development in the form of frequent feedback and support. Instructional observations, coupled with feedback from the principal and other administrators will provide further valuable professional development for the staff. The curriculum coordinator will work with teachers individually to provide support, coaching, modeling, and other assistance.

Small Group: Teachers will be expected to meet in small groups weekly. These professional Learning Communities will serve as another way for teachers to evaluate their lessons, plans, and instruction. The administrators and curriculum coordinator will frequently attend these meetings and offer feedback, coaching, resources, best practices, and support with the goal of improving instruction and student learning. New teachers will also participate in new teacher training in the form of monthly small groups where they will receive training and support to help them develop and grow into effective, experienced educators.

4. *Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.*

The principal will be responsible for planning the professional development of the staff. Five full days of PD are scheduled before school begins and are reflected in the school calendar. Three of those days will be exclusively Core Knowledge training. Other topics to be covered include how to successfully implement Saxon Math, Shurley English, and Core Knowledge Language Arts. Interpreting NWEA results, classroom management and classroom differentiation will also be covered. Topics from the days before school starts will be revisited periodically throughout the year on teacher workdays and during monthly staff meetings.

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

Four full days of professional development are scheduled throughout the year, indicated as teacher work days on the school calendar. During those days, at the discretion of the principal, topics from the initial pre-opening days will be revisited in more depth. Additional topics may be covered as needed. Additional professional development will also take place at monthly staff meetings and at monthly new teacher training meetings. The principal will work with the assistant principal (after the first year) and the curriculum coordinator to design and implement a coherent professional development plan within the framework outlined here.

### **Enrollment and Marketing:**

Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.238.29F(g) (1-7) carefully.

### **Marketing Plan**

*Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).*

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Charlotte Classical will market the school in a variety of ways with the intention of allowing as many people as possible the opportunity to apply and be a part of the lottery, if necessary.

**Parent Interest Meetings:** CCS will hold multiple parent interest meetings from the time the school is approved through the fall of the first year. The school plans to team up with local businesses and neighborhood organizations to host these public meetings. CCS plans to have meetings in the Chantilly, Grier Heights, Cotswold, Myers Park, and Sedgewood neighborhoods. Meetings will be advertised through social media, local media outlets, flyers distributed to day care centers, houses of worship, community centers, and athletic venues.

**Community Events:** Representatives from the school will attend community-wide events to promote the opening of the school, including Festival in the Park, local job fairs, and charter school fairs. At these events, the board and volunteers will hand out flyers and letters of intent. This will help the school get an estimate of enrollment numbers and seek out business partners for the school. CCS has been collecting the emails of interested community members, business owners, parents, and teachers to start building a communications list. This list will be used to notify those interested of upcoming events.

**Social Media:** CCS has a Facebook page and Twitter account (@CLT\_Classical). There is also a website, [www.charlotteclassical.com](http://www.charlotteclassical.com). The school will continue to use these powerful tools to build interest and support in the school.

**Website:** The school's website, [www.charlotteclassical.com](http://www.charlotteclassical.com) will be a way for interested parties to gather more information about the school, its mission, upcoming events, and progress.

**Advertising:** The school will advertise its open enrollment period in local media, including newspapers, to give as many people as possible an opportunity to apply before the lottery is held.

## **Parent and Community Involvement**

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

Charlotte Classical School's primary means of communicating, initially, will be through the website and Facebook. CCS will also hold community meetings, attend community-wide events, and speak to local clubs and organizations. As soon as the open enrollment period is over and a lottery is held, if necessary, CCS will be able to engage the parents of enrolled students for the first time. Parent meetings and social events will be held; parents will be appointed to board committees; a parent will be appointed to the board; CCS will assist in the formation of a PTO with active committees that will be a significant help with the opening of the school.

Once CCS is opened, parents will be a vital partners in the school's operation. There will be a designated parent room that will be the base of operation for the PTO and where parents can hold meetings, volunteer, wait before or after volunteering, and hold small events. Having a space dedicated to parents is a physical reminder of the commitment CCS makes in its mission to partner with parents.

Parents will also be an important part of the operations of the school. Parents will serve on the board, the School Improvement Team, the principal's hiring team, and board committees. Parents will be welcomed into the school and encouraged to be a part of the day. Many volunteer opportunities will be available, including helping with lunch, copying, filing for teachers, and reading to students who may be struggling. Parent meetings will be held at least annually, in addition to open houses and other events.

Twice per year afternoons will be set aside to give parents the opportunity to conference with their child's teacher. This valuable face to face meeting will help the parents understand what their student is learning and how he or she is progressing, as well as help teachers understand the parents expectations and perspective.

## **Admissions Policy**

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

1. *Tentative dates for the open enrollment application period; enrollment deadlines and procedures. \*Please be advised schools cannot accept applications until after final approval from the SBE.*
  2. *Clear policies and procedures detailing the open enrollment lottery plan including policies regarding statutory permitted student enrollment preferences.*
  3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
  4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
  5. *Clear policies and procedures for student withdraws and transfers.*
1. The open enrollment period will begin on the date of final approval from the SBE and end on February 19th at 5:00 pm. Before final approval, interested parents may fill out a letter of interest. Everyone who submits a letter of interest will be contacted and informed about how to apply as soon as final approval is granted. To apply to CCS, parents must fill out an application and mail it or hand deliver it to the school's temporary office. To be included in the lottery, applications must be in the office by 5 pm on February 19, 2016.
2. If a lottery is necessary, it will be held in a public place and announced on the CCS website and Facebook page. All of the names for the lottery will be written on cards and drawn at random. After all of the names have been drawn to fill the available spots, the rest of the names will be drawn and placed on a numbered waiting list. Families will be notified in writing whether they were drawn in the lottery and will be offered a spot for enrollment or where they were placed on the waiting list. Enrollment paperwork will be sent to students who secure a spot in the lottery process.

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CCS will give preference in the lottery to

- students of full-time staff
- students of board members

For siblings, multiple birth and otherwise, CCS will enter one card in the lottery with the names of all of the siblings on it. If the family card is drawn in the lottery CCS will offer enrollment to all of the siblings on the card. Following that procedure should ensure that siblings will be able to stay together and all attend CCS. After the first year, siblings of students who were enrolled at CCS the previous year will also get enrollment preference.

3. If a spot opens, the first student from the waiting list will be offered the spot through the first day of the third quarter. Families will be offered information and a reasonable amount of time to make the decision to accept or decline the spot. If the family chooses to decline the offer of enrollment, the next student on the waiting list will be offered a chance to enroll.

If a student wishes to withdraw from CCS, they will be asked to do so in writing. The parents will fill out a form that asks them to list the reason for the withdrawal. If the reason for the withdrawal is transportation the principal will ask to meet with them to formulate a personal transportation plan so that the student can remain at CCS.

If a student wants to re-enroll after previously withdrawing, the student will be put at the bottom of the waiting list and go through the same enrollment procedures as any other student who had not previously been enrolled. CCS will have no preference for previously enrolled students.

If a student wants to transfer to another school, he or she will first have to be withdrawn from CCS, using the procedure outlined above.

4. There will be no pre-admission activities for students or parents of CCS.

5. Students withdrawing from CCS will be asked to do so in writing. The withdrawal form will include the reason for the withdrawal and the school to which the student will be transferring.

**PROJECTED ENROLLMENT**

**2016-17 through 2020-2021**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools

LEA #2

LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000
Kindergarten	80	0	0	80	0	0	80	0	0	80	0	0	80	0	0
Grade 01	78	0	0	78	0	0	78	0	0	78	0	0	78	0	0
Grade 02	78	0	0	78	0	0	78	0	0	78	0	0	78	0	0
Grade 03	78	0	0	78	0	0	78	0	0	78	0	0	78	0	0
Grade 04	0	0	0	78	0	0	78	0	0	78	0	0	78	0	0
Grade 05	0	0	0	0	0	0	78	0	0	78	0	0	78	0	0
Grade 06	0	0	0	0	0	0	0	0	0	78	0	0	78	0	0
Grade 07	0	0	0	0	0	0	0	0	0	0	0	0	78	0	0
	314			392			470			548			626		

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<b>Section IV: Governance and Capacity</b>	<b>Reviewer</b>	<b>Page</b>
<u>Concerns and Additional Questions</u>		<b>Reference</b>

Reviewer	Score
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## **V. OPERATIONS**

### **Transportation Plan:**

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

Charlotte Classical School will have a multi-tiered transportation plan.

1. The first option, and we believe the most used option, will be parents driving their own students to and from school. Safe procedures for drop off and pick up will be established and communicated to parents and students before the first day of school and periodically after that.

2. For families that are interested in carpooling, CCS will work with the PTO to make it easy for families to establish carpools. Through advertising, parent meetings, staff assistance, and interactive websites, CCS will do everything possible to make sure families who want to carpool have that opportunity.

3. For families who would like a more traditional busing situation, CCS will work with an outside contractor to provide bus service to targeted hubs for a fee.

4. For families who would like bus service but are unable to afford it because they qualify for free and reduced lunch, CCS will cover the costs of the outside contractor to provide bus service to targeted hubs. CCS has included estimated costs of bus service for these students in the operating budget.

### **School Lunch Plan:**

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

It is the belief of the CCS board that it has a duty to care for and nurture the students of CCS, not just academically, but socially, and morally as well. Therefore, CCS will strive to make sure all students, regardless of income, are able to have a healthy lunch at school. Students at CCS will have several options when it comes to lunch at school.

1. Students may bring lunch from home. Milk will be available for purchase.

2. On selected days, students may purchase lunch through an outside vendor. The cost of these lunches will have a small profit built in that will be used to help pay for the lunches of the students who cannot afford to purchase one.

3. Cold lunches will be available for students who forget their lunch. A small profit will be built into the cost of these lunches that will be billed to the parents. This mark-up will be used to help pay for the lunches of the students who cannot afford to purchase one.



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4. For students who qualify for free and reduced lunch, CCS will provide a lunch. On days when vendor lunches are available, CCS will provide those students on FRL with a lunch from that vendor. On days when vendor lunches are not available, CCS will provide a cold lunch to students on FRL.

**Civil Liability and Insurance (GS 115C-238.29F(c)):**

The Charter School shall obtain and maintain insurance at a minimum in the following amounts:

1. Errors and omissions: one million dollars (\$1,000,000) per claim;
2. General liability: one million dollars (\$1,000,000) per occurrence;
3. Boiler and machinery: the replacement cost of the building;
4. Real and personal property: the appraised value of the building and contents;
5. Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000) to cover employee dishonesty;
6. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$1,572.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,332.00
Property Insurance	\$450,000		\$675.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$8,652.00
Total Cost			\$14,744.00

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

**Health and Safety Requirements:**

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C238.29F (a).

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

nccharter2016 09/22/2014

(Board Chair Signature)

(Date)

**Facility:**

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

*What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. If a facility has been identified please fill out the Facility Form (Appendix Q).*

The Charlotte Classical board has searched for facilities in the commercial space market in south Charlotte. All of the board members but one live in Charlotte, with several having an intimate knowledge of the area's facilities as well as relationships with commercial real estate brokers and developers.

The south Charlotte target location is very large, both in population (240,938 and 57,1r) and geography. It spreads from "74 to 77", Independence Boulevard to the east to Interstate 77 on the western side. Vertically the area starts at Midtown and goes south to Ballantyne. Included in this region are older neighborhoods like Wilmore, Chantilly, and Elizabeth, and brand new development below Interstate 485 to the south. There are many commercial opportunities, especially inside the I-485 corridor, including churches, empty retail, and warehouse/industrial, ranging generally from \$13-\$17 a square foot to lease.

The initial facilities will be leased with consideration of purchasing between years 5 and 10 as CCS builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and CCS or a transaction including a developer such as Funding the Gap, American Charter Development, HighMark, or another partner. These companies assist charters in locating facilities and then purchasing them with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new constructed facility after the term lease of the initial facility.

The facility will be in compliance with all necessary health and safety requirements required as well as any steps necessary to obtain the Educational Certificate of Occupancy.

To date the board has identified several properties, with room in this application to describe perhaps only three.

1. 8501 Tower Pointe Drive: This empty office building is located on the eastern boundary of our targeted area in Crown Point". It has 35,365' and is divisible so at its \$12 a foot lease rate we could take 22,000 feet year one at a cost of \$263,760 and increase to \$329,280 year 2 and the whole facility in year 3, costing \$424,380. These numbers have been used in the budget, although there is no commitment from the broker that the owner will wait on us.

2. 1717 Sharon Rd West: This is the former Kennedy Charter facility. It has a 52,675' main education building and a 13,805' gymnasium plus 2 houses on the 12.7 acre campus. The property is for sale or may be leased for \$9.95 a foot triple net. Currently, there is a contract on this space and it is too large for the school's immediate use. However, if the sale/lease fails the board would like to continue working on as the property would fit our needs at the fifth year enrollment. In the earlier years there may be

opportunities for partnering with another compatible organization.

3. Seven modular buildings (2 @ 7,200' and 5 @ 2,376') totaling 26,280' are warehoused in High Point, NC and two other locations and owned by Stratton Securities. Stratton leases properties to the U.S. Government and in this case a lease at Cherry Point, NC was terminated and Stratton has to liquidate the units. Costs to ship are \$6,600 and \$27,500 to assemble, or \$34,100, the minimum cash Stratton would need to work with CCS. Stratton has only suggested it has incentive to remarket and will warehouse until the units are needed. The board will continue to dialogue about the cost but the implication of Stratton is a lease deal in the \$4-6 range, well under our budgeted numbers.

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

As stated above, commercial brokers have indicated that property in that area generally is running \$13-17 a square foot. Our goal, however, is to work hard to get under those numbers.

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

While the CCS board works with a commercial broker to find a suitable permanent facility, it will simultaneously be looking for contingency facilities.

> The CCS board will identify at least two sites that can be used with limited modifications for a period of one to two years in the event that a permanent site cannot be found in time for a 2016 opening. One of these additional sites, if needed, will allow CCS additional time to locate and acquire a permanent site. Examples of a site suitable for one to two years include large churches and synagogues.

> The CCS board will identify at least two sites that can be used temporarily, for a period of two to eight weeks, in the event that a permanent site has been identified but is not ready in time for 2016 opening. One of these back-up sites will allow CCS additional time to complete any necessary modifications to the permanent site. Examples of a suitable site for up to 8 weeks are churches, community centers, and movie theaters.

Any modifications of the programs will depend on the site that is ultimately used. The most likely scenario is that PE will have to be modified if the contingency facility does not have a gym. CCS will be looking for a facility with 3 administrative offices, 1 or 2 EC offices, outdoor play area, parking for at least 150 cars, and 17 classrooms.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
What is the rationale for assuming that most parents will transport their own kids.	Kristen Vandawalker	Transportati

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Who is responsible for supporting the development of carpools? how will this be handled in a timely fashion? Is it legal to charge students for transportations? VERIFY: is revenue from bussing fees included in the budget?		
The applicant should consider a transportation plan for students with disabilities that may require transportation as a related service in the IEP.	Carol Ann Hudgens	Transportati
"Multi-tiered Transportation Plan seems vague.	Darrell Johnson	Transportati
Transportation should not be the responsibility of the PTO.	Kathryn Mullen Upton	Transportati
Outside contractor not identified.		
This plan lacks critical detail. Does the school intend to participate in the Fed FRL program? How will billing be overseen? How will the school manage the provision of lunches for students who forget their lunch in order to ensure no shortage or waste? Whos oversees these elements?	Kristen Vandawalker	School Lunch
Vendor not identified; vendor only available on selected days.	Kathryn Mullen Upton	School Lunch
On-site food service infrastructure not described.		
What are the zoning requirements for the identified options? Paragraph 3 is nearly identical to UDS. This indicates lack of legwork on the part of the applicant. What communications/negotiations have taken place with any of these vendors to date? Do they have a history of supporting new start single schools? Does the pricing in option one include the cost of renovations to take the building to the required configuration and code compliance? What is the basis for the required space in each year? How do these facility options compare to each other in terms of accessibility to the 'majority of families" that will opt to drive their students? Clarify: are the units in option 3 classroom/educational? where would they be placed? would that land add to the overall cost/sf? how would this solution work past year 1? Some of the contingency/temporary facility options such as churches/synagogue seem to imply significant renovation will be needed. What is the rationale for developing a facility for only 1-2 years? No detail regarding broker representatives/firms is provided. no basis for space estimates is provided. The facility needs to suit the program are unclear.	Kristen Vandawalker	Facility and
No indication that the proposed locations are zoned for a school.	Kathryn Mullen Upton	Facility and
Need the terms of a sale/leaseback.		

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Darrell Johnson	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

## VI. FINANCIAL PLAN

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

### **Budget: Revenue Projections from each LEA 2016-17**

**SHOW  
CALCULATIONS  
FOR FIGURING  
STATE  
AND LOCAL  
DOLLARS  
FOR THE  
PROPOSED  
CHARTER  
SCHOOL**

*Refer to the  
Resource Manual  
Finance Section  
for guidance on  
estimated funding  
amounts*

**State Funds:** Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1<sup>st</sup> month average daily membership.

- In year 1 – Base state allotments are determined by the LEA in which the student resides
- In year 2 and beyond- Base State allotments are determined by the LEA in which the school is located.

**Local Funds:** Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

**Federal Funds:** Charter schools must qualify and apply for the individual federal grants based on their population of students.

**REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS**

LEA #1600 - Charlotte-Mecklenburg Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,505.20	314	\$1,414,632.80
Local Funds	\$2,318.40	314	\$727,977.60
Federal EC Funds	\$3,768.11	31	\$116,811.41
<b>Totals</b>			\$2,259,421.81

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**Total Budget: Revenue Projections 2016-17 through 2020-2021**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
<b>-State ADM Funds</b>	\$1,414,633	\$1,766,038	\$2,117,444	\$2,468,850	\$2,820,255
<b>-Local Per Pupil Funds</b>	\$727,978	\$908,813	\$1,089,648	\$1,270,483	\$1,451,318
<b>-Exceptional Children Federal Funds</b>	\$116,811	\$146,956	\$177,101	\$207,246	\$237,391
<b>-Other Funds*</b>	\$0	\$0	\$0	\$0	\$0
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$2,259,422	\$2,821,807	\$3,384,193	\$3,946,579	\$4,508,964

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

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

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**Personnel Budget: Expenditure Projections 2016-17 through 2010-2021**

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Principal	1	\$73,000	\$73,000	1	\$75,000	\$75,000	1	\$77,000	\$77,000	1	\$79,000	\$79,000	1	\$81,000	\$81,000
Assistant Principal	0	\$0	\$0	1	\$58,000	\$58,000	1	\$59,500	\$59,500	1	\$61,000	\$61,000	1	\$62,500	\$62,500
Finance Officer	1	\$35,000	\$35,000	1	\$36,000	\$36,000	1	\$37,000	\$37,000	1	\$38,000	\$38,000	1	\$39,000	\$39,000
Office Support	1	\$32,000	\$32,000	2	\$32,000	\$64,000	2	\$33,000	\$66,000	3	\$34,000	\$102,000	3	\$35,000	\$105,000
Custodians	1	\$20,000	\$20,000	1	\$20,500	\$20,500	1	\$21,000	\$21,000	2	\$21,500	\$43,000	2	\$22,000	\$44,000
A - Total Admin and Support:	4		\$160,000	6		\$253,500	6		\$260,500	8		\$323,000	8		\$331,500
Instructional Personnel:															
Curriculum Coordinator	1	\$50,000	\$50,000	1	\$51,500	\$51,500	1	\$53,000	\$53,000	1	\$54,500	\$54,500	1	\$56,000	\$56,000
Core Content Teacher(s)	13	\$42,000	\$546,000	16	\$43,000	\$688,000	19	\$44,000	\$836,000	22	\$45,000	\$990,000	25	\$46,000	\$1,150,000
Electives/Specialty Teacher(s)	4	\$41,000	\$164,000	4	\$42,200	\$168,800	4	\$43,400	\$173,600	5	\$44,600	\$223,000	5	\$45,800	\$229,000
Exceptional Children Teacher(s)	2	\$44,000	\$88,000	2	\$45,200	\$90,400	3	\$46,400	\$139,200	3	\$47,600	\$142,800	4	\$48,800	\$195,200
Teacher Assistants	1	\$25,000	\$25,000	1	\$25,750	\$25,750	2	\$26,500	\$53,000	2	\$27,250	\$54,500	3	\$28,000	\$84,000
B - Total Instructional Personnel:	21		\$873,000	24		\$1,024,450	29		\$1,254,800	33		\$1,464,800	38		\$1,714,200
A+B = C - Total Admin, Support and Instructional	25		\$1,033,000	30		\$1,277,950	35		\$1,515,300	41		\$1,787,800	46		\$2,045,700

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Personnel:															
Administrative & Support Benefits															
Health Insurance	4	\$4,120	\$16,480	6	\$4,240	\$25,440	6	\$4,360	\$26,160	8	\$4,490	\$35,920	8	\$4,620	\$36,960
Retirement Plan--Other	4	\$2,650	\$10,600	6	\$2,730	\$16,380	6	\$2,810	\$16,860	8	\$2,890	\$23,120	8	\$2,980	\$23,840
Life And Disability Insurance	4	\$875	\$3,500	6	\$900	\$5,400	6	\$927	\$5,562	8	\$955	\$7,640	8	\$984	\$7,872
Medicare, Social Security, Unemployment	4	\$3,574	\$14,296	6	\$3,684	\$22,104	6	\$3,744	\$22,464	8	\$3,772	\$30,176	8	\$3,847	\$30,776
D - Total Admin and Support Benefits:	16		\$44,876	24		\$69,324	24		\$71,046	32		\$96,856	32		\$99,448
Instructional Personnel Benefits:															
Health Insurance	21	\$4,120	\$86,520	24	\$4,240	\$101,760	29	\$4,360	\$126,440	33	\$4,490	\$148,170	38	\$4,620	\$175,560
Retirement Plan--Other	21	\$2,650	\$55,650	24	\$2,730	\$65,520	29	\$2,810	\$81,490	33	\$2,890	\$95,370	38	\$2,980	\$113,240
Life And Disability Insurance	21	\$875	\$18,375	24	\$900	\$21,600	29	\$927	\$26,883	33	\$955	\$31,515	38	\$984	\$37,392
Medicare, Social Security, Unemployment	21	\$3,574	\$75,054	24	\$3,684	\$88,416	29	\$3,744	\$108,576	33	\$3,772	\$124,476	38	\$3,847	\$146,186
E - Total Instructional Personnel Benefits:	84		\$235,599	96		\$277,296	116		\$343,389	132		\$399,531	152		\$472,378
D+E = F - Total Personnel Benefits	100		\$280,475	120		\$346,620	140		\$414,435	164		\$496,387	184		\$571,826
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	20		\$204,876	30		\$322,824	30		\$331,546	40		\$419,856	40		\$430,948
B+E = H - Total Instructional Personnel (Salary & Benefits)	105		\$1,108,599	120		\$1,301,746	145		\$1,598,189	165		\$1,864,331	190		\$2,186,578
G+H = J - TOTAL PERSONNEL	125		\$1,313,475	150		\$1,624,570	175		\$1,929,735	205		\$2,284,187	230		\$2,617,526



**Operations Budget: Expenditure Projections**  
**2016-17 through 2020-2021**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
	Administrative & Support:					
Other	Please See Appendix U Addendum To Budget	\$0	\$0	\$0	\$0	\$0
	Audit	\$7,500	\$8,000	\$8,500	\$9,000	\$9,500
	Insurance	\$14,744	\$15,100	\$15,600	\$16,100	\$16,600
	Travel	\$2,500	\$3,000	\$3,500	\$4,000	\$4,500
	Office Expense, Supplies, Postage	\$20,000	\$23,800	\$28,000	\$31,700	\$33,800
	Legal Fees	\$7,500	\$8,000	\$8,500	\$9,000	\$9,500
	I S I S, Powerschool, And Support Fees	\$60,000	\$44,000	\$50,000	\$55,000	\$59,000
	Marketing	\$5,000	\$4,000	\$4,300	\$4,600	\$4,900
	Communications, Website, Admin Software	\$35,000	\$18,000	\$21,600	\$24,800	\$28,500
	Facility Rent	\$263,760	\$329,280	\$424,380	\$460,320	\$525,800
	Facility Repairs & Maintenance	\$30,000	\$37,200	\$45,000	\$54,000	\$65,000
	Facility Utilities	\$50,000	\$60,000	\$72,000	\$86,400	\$103,680
	Student Transportation	\$45,000	\$54,000	\$64,800	\$77,800	\$93,300
	Student Meals	\$25,000	\$30,000	\$36,000	\$43,200	\$51,800
	Technology, Equipment, F&F	\$50,000	\$30,000	\$36,000	\$43,000	\$52,000
	<b>K - TOTAL Administrative &amp; Support Operations</b>	<b>\$616,004</b>	<b>\$664,380</b>	<b>\$818,180</b>	<b>\$918,920</b>	<b>\$1,057,880</b>
	Instructional:					
Other	Books & Materials	\$20,000	\$18,000	\$22,000	\$26,000	\$31,000
	Classroom Technology & Software	\$35,000	\$30,000	\$36,000	\$43,200	\$51,800
	Curriculum	\$75,000	\$80,000	\$90,000	\$100,000	\$110,000
	E C Contracted Services	\$20,000	\$24,000	\$28,800	\$34,600	\$41,500
	Instruction Contracted Services	\$10,000	\$12,000	\$15,000	\$19,000	\$24,000
	Miscellaneous	\$12,000	\$15,000	\$18,000	\$22,000	\$26,000
	Staff Development	\$18,000	\$22,000	\$26,000	\$31,000	\$37,000
	Testing & Fees	\$12,000	\$15,000	\$17,500	\$20,700	\$22,800
	<b>L - TOTAL Instructional Operations</b>	<b>\$202,000</b>	<b>\$216,000</b>	<b>\$253,300</b>	<b>\$296,500</b>	<b>\$344,100</b>
	<b>K+L = M - TOTAL OPERATIONS</b>	<b>\$818,004</b>	<b>\$880,380</b>	<b>\$1,071,480</b>	<b>\$1,215,420</b>	<b>\$1,401,980</b>

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
J - TOTAL PERSONNEL	\$1,313,475	\$1,624,570	\$1,929,735	\$2,284,187	\$2,617,526
M - TOTAL OPERATIONS	\$818,004	\$880,380	\$1,071,480	\$1,215,420	\$1,401,980
J+ M =N TOTAL EXPENDITURES	\$2,131,479	\$2,504,950	\$3,001,215	\$3,499,607	\$4,019,506
Z - TOTAL REVENUE	\$2,259,422	\$2,821,807	\$3,384,193	\$3,946,579	\$4,508,964
Z - N = SURPLUS / (DEFICIT)	\$127,943	\$316,857	\$382,978	\$446,972	\$489,458

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

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

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

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

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

Question: How was student enrollment number projected?

Year one targeted enrollment is 314 students in grades K-3 and then grows to 704 in grades K-8 by year 6. The application filed in the previous year was for 408 students in grades K-6 in year one and escalating to 633 students in grades K-8 at year 6. The smaller initial student enrollment and especially the smaller number of grades will enable CCS to more quickly assimilate both the students and their parents into the school. This will align with one of CCS's purposes, to "provide parents and students with expanded choices..." and with the more gradual growth, we will better achieve one of our stated goals: "parents will be satisfied with their child's school."

While south Charlotte would support not only a larger school than CCS as proposed (indeed it would likely support many more charters), the emphasis on rigor and parental involvement at CCS better suit a smaller school. The first three stated goals, all addressing superior academic proficiency and education value added, or growth, will more likely be obtained if the administrative and operational requirements can be minimized and the staff can devote the greatest effort possible in the critical first year or two. A smaller charter will allow for this. CCS will be a small but vibrant community school within a large metropolitan city.

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

The targeted area is an area of Charlotte that contains 241,000 citizens, including 57,000 who are under the age of 18. There are currently no charter schools in this area. The area is reflected in the map in Appendix A. This "map gap" shows that charter growth in Charlotte has been in the inner city area and also the north, where growth has spread from the I-77 corridor but has left a gaping hole in the south that would be, in population, North Carolina's fourth largest city. The district magnets, including Chantilly, Collinswood, Cotswold, Elizabeth Traditional, and four more have an average wait list of 209 students. The closest charters are Socrates and Queen's Grant with wait lists of 438 and 1,186, respectively. Mecklenburg County

has grown and is projected to grow at 3% per year.

Directive: Provide the break-even point of student enrollment.

The breakeven point in number of students was calculated by dividing non-variable costs (fixed costs) by margin, or revenue less variable costs per student. That number was 257 students to break even. A calculation of this called "Breakeven Analysis" may be found in Appendix U (Addendum to Budget and Financial Plan).

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

More drastic measures beyond reducing staffing levels, etc. would include:

1. A renegotiation of any facilities commitment to defer two months rent, \$44,000.
2. Elimination of the Finance Officer, savings \$35,000.
3. The Core Knowledge curriculum vendor has offered a reduced level, saving \$25,000
4. \$120,000 has been estimated for infrastructure, IT, capital assets, telephones, laptops, desks, etc. Leases would defer 75% of that or \$90,000.
5. The audit fee is actually not be payable in the initial 12 months, deferral \$7,500.
6. The NCPCSA development fee will be deferred to 2017 if the ADM enrollment is less than 75% of that projected, deferral \$24,000.

Some keys to avoiding cash crises are:

1. Vigorous marketing generating application interest early.
2. Dealing with charter friendly vendors extending fair terms.
3. Retaining flexibility with our facilities commitment until a balanced budget is assured.
4. Close and consistent communication with ISIS provider, CPA & OCS consultant.

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

No, there are no revenues in our budget other than state and local ADM funds including a conservative estimate of EC funding.

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

20:1 in K and 26:1 in 1-8

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

The Board contracted with the NC Public Charter Schools Association to help develop the planned school and application. The agreement calls for a \$24,000 fee payable in year one only if a charter is awarded. The arrangement also allows for a deferral of the fee if fewer than 75% of the projected students enroll. More details of the contract and services are in the application section, "Application Contact Information."

The Board will outsource its Integrated Solutions Information Systems (ISIS)

services but has not selected a provider. However, in the budget there is estimated for ISIS, \$22,000, the development contract mentioned above, \$24,000, and \$14,000 for PowerSchool and possible other administrative services, totaling \$60,000.

CCS will likely contract for EC services to complement our two full time EC staff.

Our board will set contract authorization levels, and recognize the need for conflict of interest avoidance, for itself and for the Principal. So all commitments exceeding predetermined amounts will require approval at different levels with the appropriate assignment of contract accountability placed also, to ensure the school receives the services and products contracted for and at the correct price.

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

The budget not only aligns with the school's mission, but with curricular offerings, the transportation plan, meals plan, and facility needs. The school's mission focuses on high academic expectations which is reflected in the budget through "Curriculum" under the operations budget. The school plans to use Core Knowledge, Saxon Math, and Shurley English. These challenging curricula are included in the budget and are estimated to cost \$75,000 in year one.

Because of the importance of a rigorous academic program and the further importance of implementing the program with fidelity, a curriculum coordinator will be employed starting in year 1.

CCS will attract students of all socio-economic backgrounds. The school has set aside \$45,000 in transportation costs in year one to make sure that transportation does not become a barrier for students and parents. This cost is also reflected in the Transportation section of the application. The school plans to set aside \$25,000 in year one to provide assistance for students needing help with meals.

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

The general fund balance should equal three month's operating expenses by the fifth year. That monthly total will be \$1,005,000. The predicted accumulated surplus or general fund balance, after five years is over \$1.7 million.

So, rather than a percentage goal, the goal will be to accumulate that "Surplus", shown in the "Overall Budget" on the application page preceding this narrative. That surplus is predictably more in years 2-5 than in year one.

Obviously then, after year one CCS would like to have at least \$128,000 in the bank.

The use of surplus will, like most newer schools, be used mostly for equity

needed for purchasing or building facilities in the future.

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

CCS will always make lease versus purchase decisions based upon sound economics and professional financial analysis. In the critical initial years of operation, school leases may be required, whereas in subsequent years CCS will be able to avoid the financing costs.

The initial facilities will be leased, barring any fortuitous donation of land or facilities, with consideration of purchasing between years 5 and 10 as the school builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and Charlotte Classical School. Another, and more recent form of transaction in North Carolina, among new charters, is a transaction including a developer such as Funding the Gap, American Charter Development, HighMark, or other partner. These companies assist charters in locating facilities and then purchasing them and with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new facility after the term lease of the initial facility.

Some items such as office printers/copiers, etc. may be leased. CCS will, however, have the option of deferred payments or leases of various other items in the budget but only if the enrollment targets are not met.

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

There is no substantial number or amount of tangible resources at this time. CCS will solicit donations of goods and services upon receipt of acceptance of its application in addition to an aggressive Charlotte business fundraising campaign and grant request project.

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

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

Basics of good internal control are the foundation for the reliability of the financial statements and are needed to safeguard the resources of the school. Not only is Charlotte Classical School at risk of losing valuable resources with poor controls but there is more at risk. That is the potential for negative publicity associated with any event that might attract notoriety including financial theft or even financial mismanagement. This also often brings a stigma to other charter schools, or indeed to the whole North Carolina charter program and its attendant regulation.

We will contract with a CPA firm (see below) to provide the annual audit but in addition we will request from them an initial report on our internal controls. This will include an evaluation of our controls before we open our school so that any weaknesses are discovered and corrected before the school year begins.

We will contract for the DPI required services of the Integrated Solutions Information System with a provider after receiving more quotes. Outsourcing ISIS creates another level of cash segregation by its external accounting for our pupil funds, accounts payable, and payroll.

Internally, we will keep a petty cash fund for emergencies and use a system requiring a paid receipt and/or authorization for expenditures. Approval of expenditures over a recommended amount will require the signature of the Principal.

Accounting records will be safeguarded by use of daily locked files and to the extent practical secure online records with appropriate password protections. Sensitive records will be systematically shredded as necessary. The board treasurer will provide a financial statement to include a statement of fund balances (balance sheet) and a statement of receipts and expenditures (a P&L) at each regularly held board meeting and an explanation to board members for questions. Additionally, at least quarterly the ISIS provider and or the auditors will be asked to attend board meetings.

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

We have a contract with the NCPCSA, mentioned earlier in the "Application Contact Information" section, for assistance with the development of our school plans, our application, and subsequent support. The NCPCSA also provides the state required ISIS accounting services. The NCPCSA has related to us that there is no obligation for our board to contract with them for ISIS or any other services and the NCPCSA has advised us to solicit bids and interview other providers for this important decision.

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

Charlotte Classical School - Charlotte Classical School will partner with parents to prepare students to be lifelong learners and responsible citizens through an emphasis on literacy, critical thinking, and problem solving.

We will solicit audit bids from more than one CPA firm, qualified by the Local Government Commission. We have discussed the audit and fees with two firms who agreed that it would be in our interest to negotiate fees closer to our school opening. Those firms giving us tentative estimates of \$8,500 and \$10,500 are:

Rives & Associates, LLP, 212 West Center St., Lexington, NC , 336-248-8281  
336-248-2335

Potter & Company, CPAs, 434 Copperfield Blvd. NE, Concord, NC 28025, 704-786-8189 704-786-4447

<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
What is the basis for growth projections in EC funding?	Kristen Vandawalker	Total Budget
1. Could the assistant principal also be the curriculum coordinator? 2. Why is there only one teacher assistant until year three?	Darrell Johnson	Personnel Bu
why does the principal salary rise more annually than other admin roles? what is the basis for the custodian salary? is this a part time position? what is the basis for adding the second admin/office worker in year two? What is the basis for the differences in salary for the principal, AP, and curriculum coordinator? Is only one TA used? It seemed from the narrative that there would be more TAs serving K? Is there an EC director or does one of the teachers handle this role? what is the salary differential? What is the basis for all salary increases? are these performance based? why do specials and ED teachers grow more year over year? how will their performance be assessed given that the teach NTS? How do you know that this compensation plan is competitive with state scale or state/local charter scale? what is the basis for the projected benefits expenditures? is this a 100% payment for the staff member?	Kristen Vandawalker	Personnel Bu
The principal, assistant principal and finance officer salaries appear on the low side, and may not be sufficient to attract and retain excellent candidates.	Kathryn Mullen Upton	Personnel Bu
what is included in the travel budget and what is the basis for this line item? What is included in the office expense line? does this include the funds provided to faculty to supply their classrooms? what is the basis for the growth in this line? why does the line item for ISIS... drop off so significantly in year two? What is the basis for the marketing line item? why does this amount drop annually? what is the rationale for this amount being adequate to recruit the projected number of students, especially in year one? What is the basis for the significant dropoff in the communications line item in year two? Why is renovation of the proposed building used as the basis for the rent figure not included? what is included in the transportation line item and what is the significant annual growth based on? what is included in the tech and FFE line, and what is the basis for the significant dropoff in year two? What is included in the various instructional line items, and what is the basis for growth over time? What is included in the classroom tech line? how much of a role will technology play in the classroom, given the stated focus on traditional settings and learning modalities? How is curriculum different than books & materials, & software? why are the costs divided in this way, and what is the logic for the marginal growth and up and down year over year? What are instructional contracted services? what is covered by the EC contracted services? how many students can this amount cover? what is in the miscellaneous line item?	Kristen Vandawalker	Operations B
Marketing of \$5K appears low, as well as books and materials.	Kathryn Mullen Upton	Operations B
How many days cash on hand does the surplus cover each year? What is the logic for carrying this much of a surplus?	Kristen Vandawalker	Total Expend
Eliminating the finance officer entirely could be problematic, as it does not appear that anyone else on the projected staff has that skill set and the finance officer plays a critical role.	Kathryn Mullen Upton	Budget Narra
the applicant does not explain the process or basis for enrollment projections.	Kristen Vandawalker	Budget Narra



<p>there is no concrete evidence to support need. specifically, academic need is not demonstrated.</p> <p>the contingency plans are largely identical to those for UDS. This evidences not having thought through the specific needs of their school based on model, staffing, and enrollment, as well as the known elements of risk such as facility.</p> <p>what is the basis for the named contingencies? why is staffing reduction not considered a drastic measure, given the focus on teacher opportunity and extra teacher involvement, and the reliance on teachers to provide ancillary services such as tutoring and extra curricular support.</p> <p>What is the rationale for assuming that a renegotiation of the lease will be possible mid-term?</p> <p>Who will handle the significant workload of the financial officer?</p> <p>What core knowledge vendor are they using? Aren't most of these available for free?</p> <p>Why didn't they just use the discounted rates in their budget?</p> <p>What's the basis for assuming that leasing infrastructure will save \$90K, and how would this work given that the school infrastructure needs to be in place before students arrive?</p> <p>What is the basis for assumptions regarding facility lease? what progress has been made with the named facility developers?</p> <p>what is the basis for assuming that vendors will include a payment deferral clause in their contracts?</p>		
<p>Why would the ISIS provider or auditor attend board meetings? And what is the rationale for assuming they will commit to this?</p> <p>There is no actual plan for internal controls of adherence to GAAP.</p>	Kristen Vandawalker	Financial Au
<p>The methods for conducting an audit weren't included, although two audit firms were named.</p>	Kathryn Mullen Upton	Financial Au

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Fail
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Darrell Johnson	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

**VII AGREEMENT PAGE**

**Application Fee:**

*Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 26, 2014 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.*

*\*Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 26, 2014 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

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

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

*I understand the requirements pursuant to G.S. 115C-238.29B(e).*

nccharter2016

Date: 09/26/2014

**Applicant Signature:**

The foregoing application is submitted on behalf of Charlotte Classical School (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations.

Print/Type Name: nccharter2016

Board Position: Board Chair

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

Date: 09/26/2014

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

\_\_\_\_\_  
Notary Public Official Seal

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

## OVERALL ASSESSMENT

Would you as the Advisory Board deem this application complete? The decision of the Advisory Board regarding completeness is final. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<b><u>Total Initial Screening Votes</u></b>	
<b>No</b>	<b>Yes</b>
0	11 AH, JM, PG, HN, SR, AQ, ES, TS, BT, CT, SW

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

<b><u>Total External Evaluator Votes</u></b>	
<b>No</b>	<b>Yes</b>
3	0

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

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>
5 TS, HN, BT,SR,ES	6 AQ, AH, JM, SW, PG, CT

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

<b>Initial Screening</b>	
<b>Mission, Purposes, and Goals</b>	- djuan70
<b>Education Plan</b>	- djuan70
<b>Governance and Capacity</b>	- djuan70
<b>Operations</b>	- djuan70
<b>Financial Plan</b>	- djuan70
<b>OVERALL</b>	- djuan70 - dtsmith840 - djuan70

<b>External Evaluator</b>	
<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Mission is very general. - kmullenupton</p> <p><u>Mission Statement</u> Not clear on the explanation of the mission statement: "Parental involvement will permeate all areas of the school, including governance, operations, and academic." What role would the parents role in the school's governance? - djuan70</p> <p><u>Educational Need and Targeted Student Population</u> What is the rationale for trying to "reach a similar demographic" to the county as a whole? Will the named services only be available to students eligible for FRL? WHY would students who need bus service but are not FRL eligible be denied? Why will this educational method benefit a 21st century child? What is the rationale for not targeting a specific demographic or population? No actual evidence of need or demand is presented. the rationale for including waitlists for magnet schools is unclear, how are these schools comparable to the proposed charter? - kvandawalker</p> <p><u>Purposes of Proposed Charter School</u> is it a HIGH school? a slip in the name of the school is a pretty significant error. No evidence is presented that the school will differ in any meaningful way from district schools, unless the cited personalized learning techniques are ubiquitous, which a quick google search doesn't support. - kvandawalker</p> <p><u>Purposes of Proposed Charter School</u> Number 3 indicates the school is a high school, while other materials indicate it's K-8. - kmullenupton</p> <p><u>Purposes of Proposed Charter School</u> Proposed school mentioned "Charlotte Classical High School." Obviously an error</p>

	<p>because it later mentions K-8. - djuan70</p> <p><u>Goals for the Proposed Charter School</u>  Goals are not expressed in SMART terms.  VERIFY: are these the same as, or nearly the same as, UDS?  What is "more than one year's growth?" E.g. is the national norm for RIT increase is 6 points, is 7 points what they want? or is it double digit growth? Why are they not measuring BOY to EOY?  These goals seem with very low, especially in years where a majority of students are in primary grades and are therefore not entering multiple years behind. Why is "grade level proficiency" goal not 100%? What does grade level proficiency mean? Would goals this low get them over the bar on the charter or state performance framework?  VERIFY: using "the LEA" seems to me indicative of a plagiarized section. If the applicants do not understand the important of performance goals how can they measure progress toward them or hold school leadership accountable for that progress or lack thereof?  Goal 5 is not actually a goal. If character education is a part of your curriculum and weekly schedule, it does not rise to the level of a goal.  The board being "aware of" school performance isn't sufficient. How and when will they act on this data? How will they be trained to understand it? What can or will they do to enact course correction if adequate progress isn't evident?  There is no plan for action on the part of the board (monitoring required active participation, not passive receipt of information). - kvandawalker</p> <p><u>Goals for the Proposed Charter School</u>  While the growth goal is good, Goal 2 (reading and math proficiency), only calls for 69% proficient in reading and 68% proficient in math. Additionally, Goal 3 - meeting or exceeding the LEA's composite proficiency - may be low if the LEA is only at, for example, 50 percent. And, to the question of how much the proposed school would exceed the LEA remains (i.e, there's not a set target). Take together, these issues raise concern that goals may not be focused enough on improving student outcomes.</p> <p>Monthly monitoring process is very general. - kmullenupton</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u>  I'm not sure how this all fits together as a "classical program." What is the rationale for selecting these specific curricular products?  Clarify: Is the CK Sequence actually a curriculum?  Have these products and the CK Sequence been used together with the trivvium successfully before?  What is the rationale for the repeated assertion that students will come to CCS with knowledge or skill gaps? What types of gaps are rojected, and for which year one grade levels? thereafter, will the school be doing significant backfilling in later grades that would bring in new students at grades 1 and beyond who might have skill or knowledge gaps? The growth plan appears to indicate that new students will largely be added at K in years two and beyond.  Clarify: what does this mean? "In middle school, students will be grouped by subject, and in some cases by ability. ...The average class size in grades 6-8 will be 26, however, class size may vary depending on student interest, placement, and course offerings."  Clarify: Will students in grades 6-8 "learn in one classroom with one teacher," or "change classes and therefore have multiple teachers over the course of the day?"  - kvandawalker</p> <p><u>Instructional Program</u></p>

While the narrative states that the academic design is classical, there are no classical elements detailed in this section. Rather, the narrative focuses on specific curricula (e.g., Core Knowledge, Saxon Math, Shurley English).

Additionally, the narrative did not include documented evidence that the proposed approach will lead to improved student performance. - kmullenupton

#### Curriculum and Instructional Design

Confirm: are Shurley English, Saxon Math, and CKLA all NCCCSS aligned?

I'm still not clear on what this "diverse student population" will look like.

VERIFY: is the PD plan actually "extensive?"

What is the rationale for the assumption that parents will have children in multiple schools? is this common in Charlotte?

Overall this section lacks specific, concrete evidence. For example, what are the "resources for teachers to help them address the needs of students with a wide range of differences and abilities?" What are the strategies that "will be in place to identify and remediate students who are struggling?" How does CCS's calendar of "a full 185 days... maximize instruction time and lead to higher student achievement?"

Is 5 PD days before the start of school sufficient time for teacher induction AND teacher and staff work to prepare the school/classrooms? This seems thin, many HQ schools have 2-3 weeks especially with their founding staff.

Are there no teacher work days/PD/data days in Q2? Are the workdays in general aligned with the assessment schedule? Or are these only PLC days? Are there half days or PLS time during each week that are not addressed here? Is two teacher workdays at the end of school sufficient of year one?

The scope and sequence seems thin. It is difficult to assess whether the applicant is prepared to develop curriculum/unit plans without knowing the sub topics that will be covered. Do the sub topics align with NC standards? Is the history curriculum culturally/current events relevant for a diverse student body? E.g., for today's students, should African American history be addressed in earlier grades? - kvandawalker

#### Curriculum and Instructional Design

As noted above, there does not seem to be an emphasis on the "classical" elements of the academic design. - kmullenupton

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

This section lacks concrete and specific evidence of a sound plan/system and does not demonstrate applicant capacity to identify and serve all students.

What are examples of the research based interventions that will be employed?

Is it typical for a parent to be able to refer to an SST? Who is on the SST? how do they work with parents in line with the mission?

Are teachers compensated for tutoring? When does this happen?

Are how are teacher/staff identifications of ELLs made? is it legal to make these types of identifications without evidence from an acceptable test like WIDA?

Is ELL experience a requirement for the role of curriculum coordinator?

How will the school use "immersion model?" Will teachers be versed in this model? Are curricular materials available in anticipated ELL languages? What languages might be encountered?

How will ability grouping occur? will there be split grade classes if not enough gifted student for a full classroom are present in a specific grade? - kvandawalker

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

The narrative does not detail a clear system for identification, prevention or intervention.

	<p>Broad approaches are referenced (e.g., increased home-school communication), but they do not demonstrate a sound plan.</p> <p>Similarly, the narrative did not discuss specific instructional programs that will be used with ELL students; rather, the approach the school plans to take was presented in broad strokes (e.g., immersion, pull-outs, tutoring).</p> <p>The plan to enhance the learning of gifted students appears to be at the discretion of the teacher, and essentially is a decision as to whether to accelerate that student's learning. - kmullenupton</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>This section lacks specificity.</p> <p>Confirm: the enrollment packet is provided to parents once they have accepted/been admitted to the school?</p> <p>What is the timeframe for identifying students with existing plans?</p> <p>How are determinations regarding exiting students from services made? who participates in/makes these decisions?</p> <p>How will records be safeguarded? - kvandawalker</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>Proposed school states, "As part of the enrollment packet that every student will be required to complete, parents will have the opportunity to provide information about their child's existing IEP or 504 plan." School can not ask questions concerning IEP and 504 in the initial enrollment packet. - djuan70</p> <p><u>Exceptional Children – Education Programming</u></p> <p>This section lacks specificity. Who are the members of the EC department? What other roles and duties must they fulfill at the school?</p> <p>How will students with profound or low incidence disabilities be served and access the general ed program?</p> <p>What does "every reasonable measure" mean? What would be an example of an unreasonable measure?</p> <p>Is it really sufficient to just invite people to SST meetings, or should they be scheduled around those key stakeholders who presumably are most familiar with the child.</p> <p>The actual educational plan for serving students with EC identifications is unclear. Do the named curricula have a track record of meeting the needs of EC students? what about ELL students?</p> <p>- kvandawalker</p> <p><u>Exceptional Children – Education Programming</u></p> <p>Responses include a description of accommodations, however; there are no references to the full continuum of services for students with disabilities. The applicant should consider the variety of settings and the direct services that may be required by students that enroll. - carolann_hudgens</p> <p><u>Exceptional Children – Education Programming</u></p> <p>The plan outlined in the narrative is very general, and reflects IDEA basics. The narrative does not address how services to students with disabilities will look in a classical model.</p> <p>Question for interview: please describe what this model might look like when implemented (i.e., what does a typical day for a special needs student under this model look like)? - kmullenupton</p>
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	<p><u>Student Performance Standards</u></p> <p>What is the rationale for basing the goals on the performance of other charter schools? why not base on the schools CCS expects to pull students from?</p> <p>Clarify: are these goals based on published results only? for what assessment? has baseline data been examined?</p> <p>Clarify: why is it impossible to know where students will be? Is there a rationale for not making some baseline assumptions to develop a projected range of skill sets/achievement levels?</p> <p>Clarify, as above: how are "more than one year's growth" and "grade level proficiency" defined?</p> <p>What is the SIT? Who are its members? How and when will the goals be modified, and what role does the board have in this process?</p> <p>Who collects and analyzes data for the PLCs?</p> <p>Are there non-negotiables regarding retention?</p> <p>Exit requirements are not addressed in SMART terms. what are "strong reading, writing, listening, spelling, speaking, and presentation skills using multiple forms of expression, which are age and grade level appropriate?" What is "an understanding of the U.S. government, its history, and governing documents?"</p> <p>Why is "basic" understanding of science topics?</p> <p>Overall, these exit standards seem to set a low bar, lackin rigor and ambition.</p> <p>How will MAP scires identify students who are at rick of not graduating? Who is responsible for modifying curriculum/instructional methods to address these gaps? - kvandawalker</p> <p><u>Student Performance Standards</u></p> <p>The goal of 80 percent of students achieving 1+ year of growth is good; however, 57 percent proficient in reading and 56 percent proficient in math (and meeting or exceeding the district's composite proficiency) is not a rigorous goal that will lead to significantly improved student outcomes.</p> <p>The narrative states that NWEA MAP will be used, but provides little information on the feedback cycle to teachers. Additionally, it's unclear how many times MAP will be administered.</p> <p>Policies and standards for promotion are unclear. To be promoted, a student must meet state standard requirements, where they exist, and all grade level requirements. There is no detail on the grade level requirements, nor is any reference to promotion/retention included in the student handbook. (Note: the handbook submitted is for another school, Next Generation Academy, not Charlotte Classical School.) - kmullenupton</p> <p><u>Student Conduct and Discipline</u></p> <p>is the discipline policy set by the board or teachers? who is responsible for implementation and oversight? How will discipline be monitors by the board?</p> <p>Is dress code violation commonly in Level 2? Is this discipline plan in like with either Charlotte or state expectations?</p> <p>Does the board make decisions on suspensions or only expulsions? Is the decision made by the full board? how and when?</p> <p>This section does not address supporting positive behavior, or building a culture of "kindness and respect."</p> <p>What are the artifacts or rituals that will support these assertions: "School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced."</p> <p>How will staff be trained to implement consistently?</p>
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	<p>The handbook presented is for "next generation academy." Attribution or explanation of why a handbook for CCS is not presented is present. This indicates potential lack of the applicant to develop and monitor school policies. - kvandawalker</p> <p><u>Student Conduct and Discipline</u> The applicant does reference the discipline of students with disabilities. It is recommended that the applicant review the NC Policies Governing Children with Disabilities with regard to the requirements of providing services when disciplinary removals result in a change in placement. - carolann_hudgens</p> <p><u>Student Conduct and Discipline</u> The code of conduct described in the narrative and the one included in the handbook for Next Generation Academy do not align. For example, level II offenses in the narrative (e.g., leaving class without permission, dress code) look significantly less serious than the level II offenses in the handbook (setting a fire, theft, robbery).</p> <p>There is no procedural detail specific to suspension or expulsion. - kmullenupton</p> <p><u>Student Conduct and Discipline</u> The handbook in Appendix D is for "New Generation Academy" ("NGA") not Charlotte Classical. Level four mentions possible expulsion. Note: 115C-390.11. Expulsion. (a) Upon recommendation of the superintendent, a local board of education may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff. - djuan70</p>
<p><b>Governance and Capacity</b></p>	<p><u>Private Non-Profit Corporation</u> Why has a school proposed last year not yet recieved 501 (c)(3) status? - kvandawalker</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> Tax exempt status was not included, but could be pending. Question for interview: what is the status? - kmullenupton</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> This section does not demonstrate understanding of the difference between governance and management. For example, the applicant states: "The Board will ultimately be responsible for the operations of the charter school including financial management, personnel, academic program, and facilities." The applicant further states that the board will develop "programs and procedures." A concrete plan/timeframe for recruiting/hiring the principal is not present. The brief explanation here does not address qualifications or plans to vet candidates. No explanation of what the principal will be evaluated on is present. Will the parent member have a vote? Clarify: how many members are on the board? 5 or 7? No committee structure is present. Have applications and interviews been used to date? if not, why will parent members be subject to a different recruitment and vetting process? A calendar for board meetings is not present. Board development plan is not clear. Have exisiting members gone through this process? why is there no training on specifics such as academic data and achievemt measures, finanical viability, compliance requirements, the performance framework, etc. Who are the "PD coaches?" The response does not indicate understanding of the types of policies the board must approve. What is the rationale for seeking input from the public and the staff? What types</p>

	<p>of would policies would be impacted by " data including test scored, survey results, student performance statistics, community service performed, suspension rates, and reportable incident rates?"</p> <p>Clarify: what does the PTO being "sanctioned by the board" mean? What is the school improvement plan, and what responsibility does the board have in this regard? What will the PTO report to the board, and why?</p> <p>Why has the board not met/kept minutes? Appendix J does not appaer to include policies. Org chart appears to indicate that the SIT and PTO report to Board. Is principal direct supervisor of all staff - kvandawalker</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p> <p>The organization chart is overly broad, and does not outline a clear structure. For example, there is a block for "administration." The personnel budget shows a principal, assistant principal (year 2 and beyond), finance officer. None of these are included in the chart. Neither are the office support staff, curriculum coordinator or teacher assistants.</p> <p>The narrative first indicates that the board currently has five members, and subsequently states that the board has seven members. Question for interview: which is correct?</p> <p>The narrative states that the PTO will be a separate entity; however, the organization chart shows that the PTO reports to the board.</p> <p>The narrative did not address evaluation of the board, and there was little detail on the evaluation process for the school leader. - kmullenupton</p> <p><u>Proposed Management Organization (EMO/CMO)</u></p> <p>NA - kmullenupton</p> <p><u>Projected Staff</u></p> <p>This section is unclear. How many Office support staff will be hired? how many teachers of each type and TAs will be in place in year one and out years? - kvandawalker</p> <p><u>Projected Staff</u></p> <p>Qualifications were not included. - kmullenupton</p> <p><u>Staffing Plans, Hiring, and Management</u></p> <p>Is it appropriate for the board to begin hiring staff? should this not be the responsibility of the principal as (s)he is the direct supervisor of all staff?</p> <p>Why will the board be involved in the creation os staff evaluation tools?</p> <p>No concrete steps for recruitment, hiring or retention are present. Why would a teacher select this program if a union role gives them automatic raises?</p> <p>Clarify: will the school use only experienced teachers or a combination of new and more experienced teachers?</p> <p>What types of bonus incentives are available and why/how would they be distributed?</p> <p>There is no evidence of a rigorous or timely method for hiring teachers. Why are teachers not required to demonstrate classroom performance or lesson planning ability?</p> <p>Does the board have the authority to hire and fire stff below the principal? Why is this appropriate?</p> <p>What is considered an "appropriate attempt" to develop a teacher? Will mid-year firings be permitted?</p> <p>No concrete examples of dual roles are provided. What is the basis for asserting that this is common practice at many charter schools. What employees would be part time?</p> <p>What is the rationale for basing the EC projection on other charter schools and not the</p>
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	<p>LEA averages? What is an example of a "rigorous, challenging academic program" for the training of teachers who will serve gifted students? No concrete descriptions of roles and responsibilities such as instructional leadership, discipline and culture, staff PD and evaluation, etc, are provided. what is considered "relevant educational experience?" Overall the description of roles lack detail and the qualifications appear minimal. What does "licensed teachers are preferred" mean? The employment handbook, while a draft, seems vague and informal/colloquial. For example, "jeans, flip flops, and the like" are not to be worn. This section does not demonstrate capacity to develop and implement a rigorous, mission aligned recruiting process or create a coherent staff culture. - kvandawalker</p> <p><u>Staffing Plans, Hiring, and Management</u> The plan to recruit and retain high performing teachers was not sufficiently addressed. The only qualities sought in candidates were: professionalism, high performing (not defined), and a strong belief in the mission. There does not appear to be a rigorous process for selection, or deep pool from which to draw excellent candidates.</p> <p>Appendix O is entitled "proposed bylaws" but includes staff policies.</p> <p>Appendix O indicates that teachers will be observed once quarterly, with frequent walkthroughs also conducted. However, feedback is only give three times per year. (Attachment O at page 8.)</p> <p>- kmullenupton</p> <p><u>Staff Evaluation and Professional Development</u> How will the principal's qualifications for developing and executing PD and mentoring be assessed during the hiring process. Will this person have sufficient time, given other duties (not addressed well in the application), to handle all the components of this mission-critical work? Is feedback given in really time or only on a quarterly basis? What form does the mentoring relationship take on, and what is the point/goal for mentorship? How are mentors selected and paired with new teachers. Will mentors not have a full class load in order to allow them to do observations during the day? What is the teacher survey? How will it inform hiring decisions? If funds for bonuses or raises are not available, how will the school keep its best teachers? When and how does the Individual and small group PD occur and how does this align with the schedule and requirements for not teaching responsibilities of teachers? What is the rationale for the scope and division of time during staff induction. Who will provide training on the various curricula? What is the basis for believing that five days is sufficient time to cover this long list of topics. What is the ratioale for not having the AP and curriculum coordinator support the principal in developing the PD plan in year 1? The "framework outlined here" is not evident. - kvandawalker</p> <p><u>Staff Evaluation and Professional Development</u> The professional development appears largely centered on specific aspects of the curriculum (e.g., Core Knowledge, Saxon Math, etc). The narrative does not address the classical aspect of the design.</p> <p>The narrative references mentors for new teachers, but not detail on how the mentor</p>
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	<p>program will be implemented was included.</p> <p>The narrative was very general regarding professional development; consequently, it is difficult to determine whether \$18,000 (in year one) is sufficient). - kmullenupton</p> <p><u>Marketing Plan</u> This section lacks concrete detail, examples of strategies, and timeframes for implementation? Who is responsible for these elements? What funds support this work? - kvandawalker</p> <p><u>Marketing Plan</u> The marketing budget of \$5,000 seems low, if the proposed school is going to execute a targeted strategy. - kmullenupton</p> <p><u>Parent and Community Involvement</u> How much actual time is allocated for parent teacher conferences? Community engagement is not discussed. It is unclear how parent partnerships will be cultivated and stewarded. How will the various opportunities be communicated to parents? What are the expectations that parents will be able to participate? What will the school do if parent participation does not meet these projections? Who is responsible for developing and managing these programs? - kvandawalker</p> <p><u>Parent and Community Involvement</u> The plan appears to put the burden on the parent to become involved, and is not proactive (e.g., teachers establishing relationships with parents, connecting by phone/email, etc). - kmullenupton</p> <p><u>Parent and Community Involvement</u> Why does the proposed school feel that parents should be a part of the the "principal's hiring team".? - djuan70</p> <p><u>Admissions Policy</u> When will the lottery take place? What reasons beyond transportation might cause a student to withdraw? Will these be addressed? What types of interventions to address transportation might be available and how can these be implemented after school has started? - kvandawalker</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> What is the rationale for assuming that most parents will transport their own kids. Who is responsible for supporting the development of carpools? how will this be handled in a timely fashion? Is it legal to charge students for transportations? VERIFY: is revenue from bussing fees included in the budget? - kvandawalker</p> <p><u>Transportation Plan</u> The applicant should consider a transportation plan for students with disabilities that may require transportation as a related service in the IEP. - carolann_hudgens</p> <p><u>Transportation Plan</u> Transportation should not be the responsibility of the PTO.</p> <p>Outside contractor not identified. - kmullenupton</p> <p><u>Transportation Plan</u></p>

	<p>"Multi-tiered Transportation Plan seems vague. - djuan70</p> <p><u>School Lunch Plan</u> This plan lacks critical detail. Does the school intend to participate in the Fed FRL program? How will billing be overseen? How will the school manage the provision of lunches for students who forget their lunch in order to ensure no shortage or waste? Whos oversees these elements? - kvandawalker</p> <p><u>School Lunch Plan</u> Vendor not identified; vendor only available on selected days.</p> <p>On-site food service infrastructure not described. - kmullenupton</p> <p><u>Facility and Facility Contingency Plan</u> What are the zoning requirements for the identified options? Paragraph 3 is nearly identical to UDS. This indicates lack of legwork on the part of the applicant. What communications/negotiations have taken place with any of these vendors to date? Do they have a history of supporting new start single schools? Does the pricing in option one include the cost of renovations to take the building to the required configuration and code compliance? What is the basis for the required space in each year? How do these facility options compare to each other in terms of accessibility to the 'majority of families" that will opt to drive their students? Clarify: are the units in option 3 classroom/educational? where would they be placed? would that land add to the overall cost/sf? how would this solution work past year 1? Some of the contingency/temporary facility options such as churches/synagogue seem to imply significant renovation will be needed. What is the rationale for developing a facility for only 1-2 years? No detail regarding broker representatives/firms is provided. no basis for space estimates is provided. The facility needs to suit the program are unclear. - kvandawalker</p> <p><u>Facility and Facility Contingency Plan</u> No indication that the proposed locations are zoned for a school.</p> <p>Need the terms of a sale/leaseback. - kmullenupton</p>
<p><b>Financial Plan</b></p>	<p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> What is the basis for growth projections in EC funding? - kvandawalker</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> why does the principal salary rise more annually than other admin roles? what is the basis for the custodian salary? is this a part time position? what is the basis for adding the second admin/office worker in year two? What is the basis for the differences in salary for the principal, AP, and curriculum coordinator? Is only one TA used? It seemed from the narrative that there would be more TAs serving K? Is there an EC director or does one of the teachers handle this role? what is the salary differential? What is the basis for all salary increases? are these performance based? why do specials and ED teachers grow more year over year? how will their performance be assessed given that the teach NTS?</p>

<p>How do you know that this compensation plan is competitive with state scale or state/local charter scale? what is the basis for the projected benefits expenditures? is this a 100% payment for the staff member? - kvandawalker</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> 1. Could the assistant principal also be the curriculum coordinator? 2. Why is there only one teacher assistant until year three? - djuan70</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> The principal, assistant principal and finance officer salaries appear on the low side, and may not be sufficient to attract and retain excellent candidates. - kmullenupton</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> what is included in the travel budget and what is the basis for this line item? What is included in the office expense line? does this include the funds provided to faculty to supply their classrooms? what is the basis for the growth in this line? why does the line item for ISIS... drop off so significantly in year two? What is the basis for the marketing line item? why does this amount drop annually? what is the rationale for this amount being adequate to recruit the projected number of students, especially in year one? What is the basis for the significant dropoff in the communications line item in year two? Why is renovation of the proposed building used as the basis for the rent figure not included? what is included in the transportation line item and what is the significant annual growth based on? what is included in the tech and FFE line, and what is the basis for the significant dropoff in year two? What is included in the various instructional line items, and what is the basis for growth over time? What is included in the classroom tech line? how much of a role will technology play in the classroom, given the stated focus on traditional settings and learning modalities? How is curriculum different than books &amp; materials, &amp; software? why are the costs divided in this way, and what is the logic for the marginal growth and up and down year over year? What are instructional contracted services? what is covered by the EC contracted services? how many students can this amount cover? what is in the miscellaneous line item? - kvandawalker</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Marketing of \$5K appears low, as well as books and materials. - kmullenupton</p> <p><u>Total Expenditure Projections (Table)</u> How many days cash on hand does the surplus cover each year? What is the logic for carrying this much of a surplus? - kvandawalker</p> <p><u>Budget Narrative</u> the applicant does not explain the process or basis for enrollment projections. there is no concrete evidence to support need. specifically, academic need is not demonstrated. the contingency plans are largely identical to those for UDS. This evidence is not having thought through the specific needs of their school based on model, staffing, and</p>
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	<p>enrollment, as well as the known elements of risk such as facility.          what is the basis for the named contingencies? why is staffing reduction not considered a drastic measure, given the focus on teacher opportunity and extra teacher involvement, and the reliance on teachers to provide ancillary services such as tutoring and extra curricular support.          What is the rationale for assuming that a renegotiation of the lease will be possible mid-term?          Who will handle the significant workload of the financial officer?          What core knowledge vendor are they using? Aren't most of these available for free?          Why didn't they just use the discounted rates in their budget?          What's the basis for assuming that leasing infrastructure will save \$90K, and how would this work given that the school infrastructure needs to be in place before students arrive?          What is the basis for assumptions regarding facility lease? what progress has been made with the named facility developers?          what is the basis for assuming that vendors will include a payment deferral clause in their contracts? - kvandawalker</p> <p><u>Budget Narrative</u>          Eliminating the finance officer entirely could be problematic, as it does not appear that anyone else on the projected staff has that skill set and the finance officer plays a critical role. - kmullenupton</p> <p><u>Financial Audits</u>          Why would the ISIS provider or auditor attend board meetings? And what is the rationale for assuming they will commit to this?          There is no actual plan for internal controls of adherence to GAAP. - kvandawalker</p> <p><u>Financial Audits</u>          The methods for conducting an audit weren't included, although two audit firms were named. - kmullenupton</p>
<b>OVERALL</b>	<p><u>Cover Page</u>          It appears that the applicant is admitting plagiarism. - kvandawalker</p> <p><u>Grade Levels Served and Total Student Enrollment:</u>          Not sure if the proposed figures are tactical and realistic for school due to the several charters already in this county. There are over 20 charter schools in Mecklenburg County. - djuan70</p> <p><u>Grade Levels Served and Total Student Enrollment:</u>          Appendix A1 indicates that over almost 70 percent of over 300 survey respondents indicates that they would apply and enroll their children at the proposed school. - kmullenupton</p>

<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and Goals</b>	<p>Mr. Quigley explained Charlotte Classical School proposed location would be Charlotte-Mecklenburg and would serve grades K-8. Each board member introduced themselves. The members distributed a packet of information. There was one board member who participated through Skype. A member of the board explained the schools proposed location would be in a section of Charlotte that does not have an existing charter school.</p>

	<p>She directed them to the map that was located the packet.</p>
<b>Education Plan</b>	<p>Ms. Turner asked what instruction would look like. A board member explained when the children arrive they would be engaged in Saxon Math and work on the calendar. They would be engaged in grammar, reading/phonics lesson. Mr. Walker asked how the classical education would be explained to parents. A board member explained that they would do Night of the Notables in which they would invite parents to hear students present and ask questions.</p> <p>Mr. Walker stated he wanted to know information about how parents would be initially convinced. The board explained Classical Education would prepare students to be critical thinking. Our Classical School is going to have Spanish, Art, Music and Physical Education. This is a real interesting argument for a Classical School. The Classical Education covers everything. Mr. Quigley replied stated at this point in the interview no one had explained the components of the classical education and it was concerning. The board member explained that there were phases of core knowledge. In the budget there was a curriculum advisor/coordinator.</p>
<b>Governance and Capacity</b>	<p>Mr. Maimone noted he was excited about the classical school and he felt comfortable with the answers heard today. Ms. Taylor replied that she was confused the entire time and she had a lot of concerns. Mr. Quigley asked Ms. Turner to give information about the proposed location in Charlotte. Ms. Turner explained that the proposed location is an affluent area. Mr. Quigley noted he was also confused because information from the application was not presented during the questioning. Mr. Walker noted if they followed the plan that is in the application the school would do great. Ms. Nance noted she was concerned with the amount of money that was allocated for free/reduced lunch.</p>
<b>Operations</b>	<p>Mr. Quigley inquired about the marketing plan. The board replied the plan was to look at different civic groups, creating new relationships and taking opportunities to educate parents and houses of faith, businesses. Many relationships had already been established.</p> <p>Mr. Maimone stated he was impressed with the classical curriculum and wanted to know a more specific plan for recruiting students. A member of the board explained that the Saxon Math will be used and they would make their case to the parents. Mr. Maimone responded that Saxon Math is not enough information that will convince parents to come to the school. Another board member replied they would also have a lot of parent involvement. The classical education, especially for at-risk students, will fill in knowledge gaps.</p> <p>Mr. Quigley noted the Board would pay a fee for transportation for students who could afford it and those who could not would not have to pay. Once the student population is set they would find out who would need assistance. Transportation would not be an option. The word fee does show up in the application because the board originally thought it would be possible to use Eagle Bus company in Charlotte. They noted they understood they could not charge a fee for transportation. The board will not offer transportation. They will ask the parent to provide transportation and then encourage them to participate in a car pool.</p>
<b>Financial Plan</b>	<p>Mr. Quigley stated he still had a sense that the board would be just putting a lot of programs in place. The board explained that they were interviewed last year and the vote was close. They took a different approach with their interview this year. They put two contingency budgets together in case enrollment was not met.</p>



	<p>Mr. Quigley asked the board to talk through the contingency budget. The board member explained they just redid the budget and lowered the number of students. Ms. Turner asked where the revenues were located and could not determine the financial liability. Pages three and four were missing from the packet. He further added that the board did not have to provide the contingency budgets.</p> <p>Mr. Maimone asked them to explain what the marketing plan would be since it is slated at \$5,000. A board member replied the heft of the marketing would not be expensive. There would be grass roots marketing, strengthen the ties that are already in the community. Mr. Maimone asked for specifics for how the money would be spent. Online marketing like Facebook would be use. We are marketing specialist and we do not have to hire someone.</p>
<b>OVERALL</b>	<p>Mr. Maimone made a motion to move Charlotte Classical to the Ready to Open status. He added perhaps they did not do the best job in their presentation but the application is strong. Ms. Gibbs seconded the motion. The motion carried 6-5 with Ms. Sutton, Ms. Nance, Ms. Taylor, Ms. Reeves, and Mr. Sanchez dissenting.</p>

### Overall Summary

<b>Initial Screening</b>	The Office of Charter Schools deems this application complete.
<b>10/23/2014</b>	The CSAB voted unanimously to deem this application complete on November 14, 2014.
<b>Application Review</b>	<p>On February 9, 2015 the CSAB subcommittee voted to move this application to interview. The subcommittee vote was 6 to 0. The full CSAB vote was 11 to 0.</p> <p>Concerns outlined consisted of the following:</p> <p>Mr. Walker stated that the application seemed stronger than last year. Mrs. Taylor made a motion to bring them in to interview. The motion to move to an interview was seconded by Mr. Walker.</p> <p>In front of the entire CSAB, Mr. Quigley summed up the subcommittees results. Mr. Quigley made the motion to move this application to interview. Mr. Walker seconded.</p>
<b>Application Interview</b>	<p>On March 10, 2015 the CSAB voted to recommend this application to the SBE to start the planning year. The full CSAB vote was 6 to 5.</p> <p>Mr. Maimone made a motion to move Charlotte Classical to the Ready to Open status. He added perhaps they did not do the best job in their presentation but the application is strong. Ms. Gibbs seconded the motion. The motion carried 6-5 with Ms. Sutton, Ms. Nance, Ms. Taylor, Ms. Reeves, and Mr. Sanchez dissenting.</p>
<b>OVERALL</b>	This application will move forward to Ready to Open.