

FernLeaf Community Charter School - FernLeaf's mission is to foster a rich and engaging learning community that nurtures the innate curiosity in children, cultivates their unique passions, and creates inspired, thoughtful, compassionate, and engaged learners.



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
Brian Smith
Alan Hawkes
Steven Walker
Phyllis Gibbs

FernLeaf Community Charter School - FernLeaf's mission is to foster a rich and engaging learning community that nurtures the innate curiosity in children, cultivates their unique passions, and creates inspired, thoughtful, compassionate, and engaged learners.

Date of Review:

10/24/2014

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

FernLeaf Community Charter 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: FernLeaf Community Charter 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: *FernLeaf Community Charter School, Inc.*

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: *Michael Luplow*

Title/Relationship to nonprofit: *Chairperson Board of Directors*

Mailing address: 170 Allison Road
Mills River NC 28759

Primary telephone: 828-606-6846 Alternative telephone: 828-606-6847

E-Mail address: luplowm@gmail.com

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

County: HENDERSON

LEA: 450-Henderson County 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 School Accelerator Program

List the fee provided to the third party person or group. None

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 following statement was provided by the NC Public Charter School

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Accelerator Program:

"The NC Public Charter School Accelerator Program supports the development of public charter school applications through teaching, coaching, and application feedback. This program provides applicants with resources and access to experts in the areas of educational and instructional design, fiscal budgeting, facility selections, and legal requirements. It is the mission of the NC Public Charter School Accelerator Program to aspire a vibrant pipeline of high-quality, highly innovative, public charter schools. These public charter schools will produce strong academic results while introducing dynamic new teaching models and technology-rich learning strategies."

In addition to the above supports, the NC Public Charter School Accelerator Program also provided support and networking throughout the drafting of the application as well as assistance with proof reading and editing prior to its submission. They will continue to support FernLeaf's development during the planning year by providing:

- Assistance with board governance development.
- Guidance with financial and budget operations.
- Help with local community outreach and recruitment.
- Access to educational leaders for assistance with instructional programming.
- Access to reputable vendors for facility development.
- Networking opportunities with partners of the Accelerator program.

While the relationships established with the Accelerator Program will continue to provide support well after start-up, the formal working relationship will end after FernLeaf opens its doors to students.

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>
---------------------------------	---------------------------------	---------------------------------

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? FernLeaf Community Charter School, Inc.

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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:

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	176
Second Year	K,01,02,03,04	224
Third Year	K,01,02,03,04,05	272
Fourth Year	K,01,02,03,04,05,06	320
Fifth Year	K,01,02,03,04,05,06,07	368

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.

fernleaf
Signature

Chairperson
Title

fernleaf
Printed Name

09/25/2014
Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>Though FernLeaf is the only charter school in the area, the ability to acquire 44 students per grade level especially the testing third grade who are already comfortable with their friends may be a challenge in reaching an enrollment of 176 students in the first year. How can you guarantee that you will be able to reach the 176 students in the first year?</u>	<u>Brian Smith</u>	<u>Grade Levels</u>
<u>Appendix A1 supports the projected figures.</u>	<u>Kathryn Mullen Upton</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<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>Pass</u>
<u>Tammi Sutton</u>	
<u>Brian Smith</u>	<u>Fail</u>
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	
<u>Phyllis Gibbs</u>	

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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:

FernLeaf's mission is to foster a rich and engaging learning community that nurtures the innate curiosity in children, cultivates their unique passions, and creates inspired, thoughtful, compassionate, and engaged learners.

Clearly describe the mission of the proposed charter school:

FernLeaf's mission speaks to our vision of creating a rich learning environment that embodies the essence of community, understanding, and the human spirit. Grounded in humble respect for our surroundings, the individual, and the world as a whole, we seek to engage the unique passions and aptitudes of the entire school community so that in addition to achieving academic fluency, students become thoughtful, compassionate, and engaged members of society.

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.*

FernLeaf's target population includes families who prefer a small school setting to that of the large overcrowded schools of the surrounding LEAs. Our target population also includes families who desire an instructional program that utilizes a project based experiential learning model instead of the traditional classroom based approach. Both FernLeaf's small size and instructional approach are options that are not available in the surrounding LEAs. More specifically, our target population includes families who are seeking a more focused instructional approach that allows students to apply content and knowledge in real world contexts in order to exercise higher order thinking skills and solve relevant problems. Appendix A provides specific information demonstrating the educational need of FernLeaf's target population.

FernLeaf will not discriminate against potential students on any basis. In order to ensure a rich learning community, a mandate of our mission, we will reach out to a diverse student population that mirrors or exceeds the racial and ethnic composition of the surrounding LEAs in Henderson and Buncombe Counties (see Appendix A-13 for race/ethnicity data). If initial enrollment does not reflect that of the local school system, per our mission and House Bill 250, the board will develop specific strategies to ensure that future

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enrollment is representative of the racial, ethnic, and economic composition of the local school systems.

FernLeaf's small size and project based experiential learning model were developed to support the needs of our community that are not being met by the traditional classroom based instructional model found in the surrounding LEAs. A K-8 student body was specifically selected based on the rationale that this age group is among those who could most benefit from FernLeaf's approach. These formative years are filled with enormous growth, and our small setting and instructional approach provide a rich backdrop to meet the needs of this diverse group.

FernLeaf's location will be in the northern section of Henderson County with reasonable proximity to the I-26 corridor. This location facilitates easy access for our previously described target population from both Henderson and Buncombe counties. The location of the only charter school in Henderson County and those in neighboring Buncombe County leaves a geographic hole where no charter schools exist. For most families who live in this area, the travel time to these other charter schools prohibits them from being practical educational options for their children.

The proposed location has a sufficient base of school-aged children in the area from which to attract a diverse student body (see Appendix A-7 and A-13 for census and diversity data). The large sizes of the traditional public schools in the immediate vicinity of FernLeaf's proposed location demonstrate that our student projections are practical and attainable (see Appendix A-5 for school sizes). Furthermore, this location provides convenient access to the numerous natural, cultural, and historical resources of our community allowing for student learning that is rich, relevant, and engaging.

- 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).*

FernLeaf's total projected enrollment beginning in the 6th year of operation is 416 students in grades K-8. It is expected that 70% of these students will come from the Henderson County Public Schools LEA representing 3.10% of their K-8 ADM, with the remaining 30% coming from the Buncombe County Schools LEA representing 0.7% of their K-8 ADM.

*Figures based on the most recent ADM data available from NC DPI for the 2013-2014 school year showing:

Henderson County Public Schools K-8 ADM = 9,376

Buncombe County Schools K-8 ADM = 17,852

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

FernLeaf's education plan has been crafted with strong input and leadership from current and former teachers from around the country who have worked in a variety of educational settings. It differs from that of the area LEAs in these four basic areas: Instructional Methods, Academic Focus, Operational Structure, and Student Growth.

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Instructional methods move beyond the traditional classroom based direct instruction found in the surrounding LEAs by employing a rich and varied project based experiential learning model that brings the Common Core and NC Essential Standards to life for students, teachers, and the community. Blended with this are learning environments in which students learn content and receive instruction in formats tailored to their unique and individual needs. This combined approach facilitates true academic fluency where students not only acquire knowledge and content but are able to apply it in real world situations through project work.

FernLeaf's academic focus will balance traditional core academic subjects with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness. FernLeaf's small size and previously mentioned instructional methods permit effective integration of these varied disciplines allowing students to make connections between all of their learning.

Our operational structure differs from the surrounding LEAs in terms of school logistics and physical infrastructure. FernLeaf utilizes flexible class scheduling and, where appropriate, facilitates multi-age learning environments. Strong teacher/student relationships are promoted by assigning teachers to work with students over a period of multiple years promoting long term relationships and accountability for both students and staff. The role of the physical environment in learning is emphasized and the school is designed to be warm and inviting, alive, and full of learning opportunities. The average size of Henderson County K-5 schools is nearly 500 students and the average size for 6-8 schools is 772 with half of them approaching 900 students. With a K-5 size of 272 students and a 6-8 size of 144 at full capacity, FernLeaf is able to personalize school and create a sense of community that is not possible in the larger schools found in the area LEAs. This difference is especially important through the formative middle school years. The size difference also contributes to FernLeaf's ability to foster a healthy culture and strong sense of community within the school while reaching out to be a part of the broader community.

FernLeaf also takes a different approach to student growth through our assessment practices. A comprehensive assessment strategy is utilized to meet the academic, intellectual, social, and personal needs of students. This strategy incorporates not just quantitative measures, but a wide variety of ongoing qualitative measures designed to help students and teachers form a more complete picture of student growth and development. In addition to the NCREADY accountability model and other nationally normed assessments (i.e. NWEA MAP testing), our comprehensive strategy includes: a specially designed mastery learning checklist for foundational skills in math, content specific narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and personalized learning plans. Personalized learning plans address not only academic goals, but also a host of social, emotional, and developmental goals all contributing to high levels of success and well-being at school and beyond.

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).*

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

The Six Legislative Purposes of a Charter School are:

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

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

FernLeaf's emphasis on maintaining a small learning community provides teachers with numerous professional opportunities not available in traditionally larger schools. Small size allows teachers to develop a more personal and intrinsic investment in the school. It also results in teachers having opportunities to exercise multiple areas of professional strength by teaching within different disciplines and integrating subject matter.

Through utilization of a project based experiential learning model, FernLeaf teachers play a major role in developing and implementing the learning program at the school. This role is born out of the necessary collaboration between teachers, families, and the community in the development of rich experiential learning opportunities. FernLeaf also affords teachers a powerful voice in the development of the school's goals, direction, and policies. Furthermore, in the spirit of collaboration and sharing being modeled for students, teachers attend external professional development and then lead onsite training sessions for their peers. These leadership opportunities present teachers with new professional experiences that are often not available to them elsewhere. Along with high quality professional opportunities comes a corresponding increase in teacher satisfaction, motivation, and investment - all leading to better educational opportunities for students, their families, and the community.

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

FernLeaf provides parents and students with a small K-8 learning community

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built around a project based experiential learning model. This instructional approach does not exist in the surrounding area and the nearest charter school that offers a reasonably similar approach is 30 minutes away from our proposed location. Furthermore, our K-8 class structure is unique by comparison to the standard K-5 and 6-8 structures present in Henderson County and provides a consistent learning environment for nine successive years. This provides opportunities for deep connections to be forged between FernLeaf students, families, and the community.

Existing public educational opportunities in the area are often one size fits all, and many students need a different environment in order to be successful. By offering a small and engaging learning community and a different instructional model which is not available in the surrounding LEAs, FernLeaf is able to provide families with additional educational opportunities to help ensure the success of all students in the community.

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.*

Operations:

In order to ensure that the project based experiential learning model is being effectively implemented and that the instructional program is providing students with a rich and engaging learning community, the board has developed the following goals:

Operational Goal 1: At least two "major" projects will be developed, implemented, and assessed each year. "Major" projects are defined as those that span a period of more than 2 weeks, involve a minimum of 2 grade levels, integrate a minimum of 3 curricular areas, and feature some aspect of community engagement. Data surrounding project scope and progress will be provided to the Board of Directors at regularly scheduled monthly board meetings as a part of the School Director's monthly report.

Operational Goal 2: All students will be engaged in off site learning opportunities a minimum of eight times per year. Progress toward this goal will be provided to the Board of Directors at regularly scheduled monthly board meetings as a part of the School Director's monthly report.

Academics:

Academic Goal 1: 80% of students will demonstrate growth annually in reading as evidenced by results from a quarterly nationally normed assessment (i.e. NWEA MAP testing) in each of the first 5 years of operation. Performance data will be reported to the Board of Directors by the School Director on a quarterly basis at regularly scheduled board meetings as a part of the School Director's monthly report. Data will be communicated to parents and students on an ongoing basis through direct communication, conferences, etc.

Academic Goal 2: 80% of students who have been enrolled for more than 1 year will demonstrate growth as evidenced by results from End of Grade tests for each tested subject area. Aggregate data will be provided to the Board

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of Directors by the School Director at the conclusion of each school year for years 2-5 of operation after a baseline has been established in year 1. Performance information will be communicated to parents and students through direct communication, conferences, etc. NC School report card data will be displayed prominently on the FernLeaf website for easy access by the broader community.

Finance:

Financial Goal 1: In order to ensure fiscal health and responsibility, the annual budget will yield the following reserves:

- Year 1 will leave a minimum of 5% of total annual expenditures.
- Year 2 will leave a minimum of 6% for a cumulative 11% of total annual expenditures.
- Year 3 will leave a minimum of 6% for a cumulative 17% of total annual expenditures.
- Year 4 will leave a minimum of 6% for a cumulative 23% of total annual expenditures.
- Year 5 will leave a minimum of 7% for a cumulative 30% of total annual expenditures.

Financial data will be provided to the board at regularly scheduled monthly meetings by the chair of the finance committee and as a part of the School Director's monthly report.

Financial Goal 2: In order to ensure fiscal health, the following enrollment and growth targets will be met:

- 100% of enrollment targets will be met in year one and all subsequent years.
- School wide waiting list will grow by at least 15 students per year beginning in the 2nd year of operation.

Enrollment and waiting list data will be communicated to the Board of Directors at regularly scheduled monthly board meetings as a part of the School Director's monthly report.

Governance:

Governance Goal 1: In order to ensure successful governance of the school, the board will participate in a minimum of 12 hours of governance training each year. The board will evaluate progress toward this goal on a quarterly basis.

Governance Goal 2: A minimum of 80% of students, parents, and staff will report a high level of satisfaction with the school as evidenced by results from an annual survey. Survey data will be communicated to the Board of Directors at the conclusion of each school year by the School Director.

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

The board will continually revise its strategic calendar (see board policy 207 - Appendix J) that provides for significant oversight to all aspects of FernLeaf's operation. Monthly board meetings will include these components of the strategic calendar. Committees will provide board members with

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relevant reports seven days in advance of all meetings to allow ample time for thoughtful review. The reports will provide the deliverables regarding the school's goals and any recommendations for action by the board. Monthly board meetings will also provide opportunities for the School Director to present their monthly report to the board detailing the ongoing pursuit of the school's mission. The report will provide a variety of information and data highlighting the growth and successes of the educational program, school events, and other student, teacher, and school wide accomplishments. This includes the implementation of project based learning activities, student academic progress, community involvement, and other data provided by the School Director or requested by the Board of Directors as appropriate. Monthly board meetings will also allow the School Director to provide data regarding the progress of the school in meeting its operational, academic, and financial goals as described in the previous question.

As a supplement to the tangible data provided to the Board in the School Director's report, subjective survey data will also be used to establish a more comprehensive picture of progress towards meeting our mission. Results will be used to inform policy development and directives for the school. The following surveys and less tangible goals have been established to reflect the fundamental tenets of our Mission:

Providing access to a rich learning environment:

Annual student surveys will reflect that 80% report being challenged and interested in the educational content and activities being delivered and that 80% feel that they have access to a wide variety of educational offerings. The Board will also monitor annual results from a comprehensive school wide "review" conducted by the School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

Nurturing curiosity and encouraging the development and pursuit of individuals' unique passions and aptitudes:

Annual student and parent surveys will reflect that 80% of respondents believe FernLeaf has facilitated pursuit of interests and passions to a high degree.

Maintaining strong relationships with the broader community:

Community survey responses after completion of service projects and other community interactions will indicate 90% of those surveyed possess a favorable view of FernLeaf.

Allowing students to become thoughtful, compassionate, and engaged:

The Board will monitor results from a comprehensive school wide "review" conducted by the School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
	Kristen Vandawalker	Mission Stat
How many teachers are you planning to hire? Is there a list of students that are ready to come to your school?	Brian Smith	Educational
What is the basis for the asserting the the surrounding schools are "overcrowded?" How does this small school address the issue of the alleged overcrowding? Will it pull sufficient students from any one school to bring the enrollment down to a more manageable level? While the applicant has conducted significant research of the target area, the target population of students is not clear, nor is it apparent that there is an educational need for the school.	Kristen Vandawalker	Educational
How will Fernleaf provide teachers the powerful voice in the development of the school's goals, direction, and policies?	Brian Smith	Purposes of
While the applicant describes a school that meets legislative objectives, the connection to improved student achievement is not clear.	Kristen Vandawalker	Purposes of
Goals are not addressed in SMART terms. Operational goals seem to be just executing the planned model, which does not rise to the level of a goal? Academic goals lack rigor and specificity. Why is a flat goal of 80% of students appropriate? What is "growth?" Should ALL students grow BOY to EOY AND year over year? It is unclear how the board will assess the school's progress. Monitoring and assessing are not the same thing.	Kristen Vandawalker	Goals for th
Growth targets were not included; these would strengthen the growth goals, making the measurable and provide a defined target for improving student outcomes.	Kathryn Mullen Upton	Goals for th

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

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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.

FernLeaf's instructional program is built upon a project based experiential learning model implemented in a small school setting. In addition to providing learning opportunities that are not currently available in the area, the program has been designed to meet the needs of students and families who desire a small school, appreciate experiential learning, are seeking a different approach, want to apply their learning, and believe school can inspire and fuel curiosity. Utilizing the Common Core and NC Essential Standards as a foundation, our program revolves around four main areas:

Instructional Methods: The curriculum is brought to life and made relevant, meaningful, and engaging through a project based experiential learning model. A strong academic skill set is achieved through the use of a mastery learning model for foundational skills in math, small group instruction, and blended learning settings. This approach and a small size provide flexibility in meeting students' needs through practical differentiated instruction and curriculum integration while providing opportunities that are not available in the surrounding community.

Academic Focus: Through access to a variety of subject matter and opportunities in a broad set of disciplines, students are encouraged to discover their unique passions and aptitudes while developing a wide range of skills and knowledge. Core academic subjects are balanced and integrated with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness. Our emphasis on a broad array of subject matter and integration of the various disciplines through project work aids in meeting our mission and supports the needs of our target population.

Operational Structure: Small size allows the flexibility required to implement the curriculum in an engaging way and to adapt to the changing needs of the school. Flexible class scheduling allows us to focus on the areas of greatest need rather than adherence to a rigid schedule. It also allows for short and long term project development utilizing the time and resources necessary to create a rich and engaging learning environment. This approach affords students the opportunity to work at their level and engage in multi-age learning environments where appropriate. Additionally, strong relationships are promoted by assigning teachers to work with students over a period of multiple years promoting long term relationships and accountability for both students and staff.

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Student Growth and Assessment: A comprehensive assessment strategy will be utilized whereby staff and students constantly evaluate themselves and their peers promoting perpetual academic, personal, and social growth. This strategy incorporates a wide variety of quantitative and qualitative assessments designed to help students grow while providing continuous academic progress monitoring. In addition to the NCREADY accountability model and NWEA MAP testing (or other nationally normed assessment), our comprehensive strategy includes a mastery learning checklist for foundational skills in math (Appendix B), narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and personalized learning plans. Personalized learning plans address not only academic goals, but also a host of social, emotional, and developmental goals all contributing to high levels of success and well-being at school and beyond. Our comprehensive assessment strategy provides opportunities for growth and learning that are not possible in the larger settings of the traditional public schools.

Instructional strategies have been developed by experienced teachers in a range of disciplines and are supported by the existence of significant writings, research, theories, and concrete examples. A sampling of sources drawn from in the development of the instructional program are listed in Appendix U-2.

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.

FernLeaf's basic K-5 learning environment is built around an overall small school size and utilizes a project based experiential learning model to provide an engaging and nurturing learning community that is not available in the surrounding LEAs. We limit classes to two per grade level with class sizes of 20 in kindergarten, 22 in 1st and 2nd grades, and up to 24 in 3rd - 5th grades resulting in a total K-5 population of 272 students. This is nearly 50% smaller than the average Henderson County elementary school. While FernLeaf's class sizes are in line with actual class sizes found in the surrounding LEAs, it is through our significantly smaller overall school size that we achieve a nurturing and engaging learning community that is not currently available to families.

Class structures incorporate a variety of learning environments including project based experiential learning opportunities which regularly take students beyond the classroom and often permit multi-age collaboration with students in other grades. This is in contrast to the educational approach of traditional classroom based instruction found in the surrounding LEAs. While FernLeaf does provide for some traditional classroom based instruction aside from its experiential offerings, as is sometimes necessary, we also provide additional learning environments such as independent study, small group instruction, and blended learning opportunities (technology-assisted content delivery/instruction blended with teacher driven instruction). Blended learning is used more widely in grades 3-5 with grades K-2 having intentionally restrained exposure to technology to ensure mastery of fundamental skills.

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FernLeaf's basic 6-8 learning environment is similar to that of the K-5 environment in that it is built around an overall small school size, utilizes a project based experiential learning model, and limits classes to two per grade level to provide an engaging and nurturing learning community that is not available in the surrounding LEAs. The size difference between FernLeaf and the surrounding LEAs becomes more pronounced at this level however. With the average middle school in Henderson County containing 772 students, with half approaching 900, FernLeaf provides a 6-8 learning community that is nearly 80% smaller with only 144 students. At a moment in time when many adolescents and teenagers are reaching out into the world to discover their place within it, often with lifelong consequences, FernLeaf strengthens its ties with these students by providing a tightly knit community from which they can draw inspiration, guidance, and support.

Class sizes in grades 6-8 are capped at 24 students per class. The overarching characteristics of classes begin to shift in these grades to incorporate an increase in developmentally appropriate personal responsibility and accountability not found in the lower grades. Class structures are also very similar to those found in the lower grades and continue to represent a departure from that of the surrounding LEAs. Project based experiential learning opportunities continue to regularly take students beyond the classroom and permit opportunities for multi-age collaboration, but they begin to demand a greater level of student independence and self direction than in K-5. Small group instruction, independent study, and traditional classroom-based instruction continue as well, but blended learning opportunities begin to be incorporated to a greater degree than in the lower grades.

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.*

FernLeaf's curriculum aligns with our mission primarily in the manner in which the curriculum is implemented. Implementation via a project based experiential learning model, an approach not available in the surrounding LEAs, brings the Common Core and NC Essential Standards to life for all students and promotes a rich learning community where the acquisition and application of knowledge and skills is relevant, meaningful, and engaging. Through exposure to core academics integrated with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness, FernLeaf students are afforded the opportunity to realize and develop their unique passions and aptitudes in an engaged and supportive community. This type of integration is not possible in the typically fragmented approach to education found in the larger schools of the surrounding LEAs.

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It is also through the approach to curriculum implementation that FernLeaf is able to meet the needs of our targeted population. By offering families a small school with an instructional program built around a project based experiential learning model, we are able to provide them with opportunities that are not available to them in the surrounding community.

FernLeaf's curriculum is based on the Common Core and NC Essential Standards allowing full compatibility with the NCREADY accountability model. Standardized assessments associated with the NCREADY accountability model include End of Grade tests, 8th grade Math I End of Course test (formerly Algebra I), 8th Grade ACT EXPLORE, and NCEXTEND 1&2. NC Final Exams are utilized in conjunction with the teacher evaluation component of the NCREADY model for all content areas for which they have been established. Identification of limited English proficient (LEP) students is achieved with the WIDA ACCESS Placement Test (W-APT), and those identified as LEP are administered the ACCESS for ELLs or the Alternate ACCESS for ELLs. In addition to the standardized assessments associated with the NCREADY model, we will also utilize NWEA MAP testing (or other nationally normed assessment) to aid in measuring growth and proficiency. FernLeaf also adheres to the State Board of Education's Policies on expected growth and K-2 assessment requirements (TCS-U-010 and GCS-C-016), and is accountable to the State's requirements for 3rd grade reading proficiency and promotion set forth in SB-337. While families are able to gain access to educational opportunities not available to them in their local traditional public schools, they can rest assured that their children will be measured against the same set of standards as students throughout the rest of the state.

- 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.*

In pursuit of FernLeaf's mission, teachers in all grade levels are masters of a wide array of instructional strategies and approaches. While the manner of instructional delivery varies between elementary and middle grades, the underlying strategies remain consistent. To bring the Common Core and NC Essential Standards to life for all grade levels, FernLeaf teachers are adept at short and long term project development, able to craft rich and engaging experiential lessons, and can effectively map skills and content to allow for true curriculum integration across a variety of disciplines. This requires teachers to possess an understanding of the entire curriculum, not just their specific area of expertise. They must also fully understand the mastery learning model (K-5 math only) and be able to meet students at their current level by providing differentiated instruction for all students, including those identified as EC, ELL, and AIG. In order to implement these varied strategies, teachers must be comfortable working in a number of different instructional settings including on/off site project based experiential learning settings, individual, small, and large group settings, as well as multi-age, blended learning, and collaborative learning environments. These approaches provide students with opportunities for increased academic achievement by creating relevant and meaningful learning environments that allow them to become academically fluent, thoughtful, compassionate, and engaged.

Teachers possess a broad skill set allowing them to provide students with varied experiences in numerous disciplines. At the core of this skill set is

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their ability to teach, model, and integrate ways of learning, doing, and being. Research demonstrates that incorporating social emotional learning (SEL) throughout the curriculum allows children to perform better at school and in life. Aspects of SEL that FernLeaf teachers model and teach include self awareness, self management, relationship skills, responsible decision making, mindfulness, work ethic, etc. FernLeaf teachers also have a keen ability to simply make learning fun. This is an important part of what engaging children is all about, and unfortunately it is often lost in the traditional classroom setting.

Teachers are masters of numerous instructional strategies related to FernLeaf's comprehensive assessment approach. They are able to drive instruction through ongoing formative assessment and are able to engage students in summative assessment practices without allowing them to become the end in themselves. They implement qualitative assessments in addition to quantitative assessments to help students develop a clear picture of their learning, their place within the school community, and their role within the broader world. This represents another important aspect of FernLeaf's instructional approach that is not available in the area LEAs. Teachers utilize the mastery learning checklist (appendix B) both formally and informally to ascertain the individual needs of all students in math and to enable them to plan effective learning experiences. FernLeaf's culture of reflection is encouraged through modeling, but also by guiding students in the creation of self assessment measures and the development of student portfolios. Narrative assessments allow teachers to reflect on every student and to provide themselves, students, parents, and other teachers with a nuanced look at student growth that captures much of what is missed in traditional assessment methods.

Clearly, the expectations placed on FernLeaf teachers are great. By raising the bar for what teachers are capable of accomplishing, providing them with the time, resources, and support they need, and encouraging them to constantly refine their skill sets to better meet the needs of their students, FernLeaf is able to provide families with an instructional program that is not available to them in the surrounding community.

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.*

FernLeaf's previously described instructional approach provides students at all grade levels with unique opportunities to not just acquire content and knowledge, but also to solidify their understanding through practical, hands on, real world application. Through an ongoing emphasis on social and emotional learning and by ensuring that students are meeting academic standards set forth by the NC READY Accountability Model as well as our own internal standards, FernLeaf students will be well equipped both academically and socially to transition from one grade to the next. This also leaves them prepared to meet the academic and social challenges they will face upon graduating from FernLeaf and entering high school.

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).*

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8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

The calendar is a variation on the traditional calendar found in the area LEAs and is designed to balance the needs of students, parents, teachers, and the community. Scheduled instructional days and intersession breaks provide continuity in the learning process, facilitate both long and short term project undertakings, provide students and teachers with adequate breaks, and limit the consecutive time students spend out of school in order to ensure retention of skills and content. The duration of intersession breaks provides parents with adequate opportunities to spend time with their children while balancing the very real considerations of work schedules. The regularly scheduled professional development days and teacher work days provide teachers with adequate time for collaboration and the development of rich and engaging learning opportunities.

See appendix C for a detailed academic calendar. A general outline is as follows:

August 8th-17th, 2016: Teacher Workdays/Staff Development
August 18th, 2016: First day of school
September 5th, 2016: Labor Day (no school)
September 30th, 2016: Teacher Workday/Staff Development
October 24th-28th, 2016: Fall Intersession Break
November 11th, 2016: Veterans Day (no school)
November 23rd-25th, 2016: Thanksgiving Holiday (no school)
December 24th, 2016 - January 6th, 2017: Winter Holiday/Intersession Break
January 16th, 2017: Martin Luther King, Jr. Day (no school)
January 27th, 2017: Teacher Workday/Staff Development
February 24th, 2017: Teacher Workday/Staff Development
March 20th - 31st, 2017: Spring Intersession Break
April 28th, 2017: Teacher Workday/Staff Development
May 29th, 2017: Memorial Day (no school)
June 2nd, 2017: Last day of school
June 5th-16th, 2017: Teacher Workdays/Staff Development

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.*

FernLeaf's instructional approach and use of school wide supports and resources such as individual and small group tutoring/instruction, mentor relationships, personalized learning plans, and student led conferences serve to meet each student's unique educational needs. Student assessment tools such as the mastery learning checklist (appendix B), NWEA MAP testing (or other nationally normed assessment), EOG tests, and NC Final Exams also serve as helpful tools in monitoring student progress. Together, these supports and assessment resources allow teachers to closely monitor student learning.

In circumstances where learning concerns arise, a student support review process will be utilized to identify and address at-risk students' problem areas or deficits. Classroom based interventions will have already been developed as a part of the student's personalized learning plan. This plan

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will have been created through a collaborative conference including the student, parent/guardian, and relevant teachers. In emergency situations all steps of this outlined process may be expedited at the recommendation of the School Director.

The subsequent process will be as follows:

1. The student's existing personalized learning plan will be reviewed and additional classroom based interventions will be developed.
2. Interventions will be implemented and progress monitored for a period of time no less than four weeks.
3. If these interventions do not produce significant improvements, a student support team made up of relevant teachers, support staff, and an administrator will develop personalized, data driven, and research-based intervention strategies.
4. These interventions will be monitored through regular data collection and revised as necessary to provide the most effective supports possible.
5. If the developed interventions prove successful, they will be continued.
6. If continued interventions do not prove beneficial to academic progress, further screening and evaluation will be considered and additional strategies will be developed and implemented.
7. If further screenings and evaluations result in the recommendation for specialized support services, those services will be provided.
8. The assessment tools outlined in paragraph one of this section will be used to monitor the identified student's progress.

In situations where struggling students do not qualify for formal services (ELL, EC, etc.) FernLeaf will continue to support these students through the regular education program. Individual needs are met on a daily basis in learning environments where students can progress through the curriculum at their own pace. As foundational skills in math are acquired, their progression is tracked through the use of the mastery learning checklist permitting a complete picture of students strengths and weaknesses. Furthermore, our small school setting and project based experiential learning model permit a great deal of flexibility in scheduling to meet the individual needs of students. Small size also makes it possible to keep all students engaged making it more difficult for them to "fall through the cracks". Our instructional program in general allows teachers to facilitate a diverse set of learning environments through project work, small group instruction, and blended learning settings all designed to ensure that the needs of all students are being met.

Every effort will be made to serve all students in the least restrictive environment with their peers. We are committed however to making all necessary accommodations available to students based on individual need. We will utilize small group instruction, individual and small group tutoring, reteaching of previously taught materials, and other personalized learning supports as needed to continually meet the needs of all students. By providing these academic supports, FernLeaf will work to both prevent students from falling behind and intervene when learning difficulties occur.

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.*

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- 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.*

1. Methods for identifying ELL students:

FernLeaf will ensure that English Language Learner students are appropriately identified by asking parents or guardians to complete a Home Language Survey at the time of enrollment. The survey will include questions related to the language spoken in the home, number of years living in the United States for students born outside of the United States, previous identification as an English Language Learner, and previous services provided. Communication with non-English speaking parents will be provided, to the extent possible, in a language understood by the parents. Students not previously identified who demonstrate a possible need for English as an Additional Language services (formerly ESL) will be screened using the WIDA ACCESS Placement Test (W-APT). For students entering from other schools, records from the previously attended school will be reviewed to determine whether or not the student is identified as an English Language Learner and has received English as an Additional Language services.

2. 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:

A team of qualified staff will utilize language assessment results, student observation, student and parent input, and data regarding the student's academic progress on the mastery learning checklist, NWEA MAP test (or other nationally normed assessment), and other relevant data sources (including EC or AIG identification) to develop a personalized learning plan. Instructional settings will be arranged and managed in a manner that facilitates individualized learning. This will be accomplished through small group instruction, project based experiential learning formats, and the use of blended learning strategies. Students will progress through much of the curriculum at their own pace with personalized support, and the varied approaches to curriculum implementation will serve to foster a natural acquisition of the English language for ELLs. These approaches create an environment which facilitates a healthy system of growth and learning for all students, including ELLs. As with other students with unique learning needs, as much, if not all instruction will be provided in the least restrictive classroom setting. If an ELL student's needs require more supports than can be offered in the regular classroom context, additional accommodations will be provided outside of the classroom.

3. Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services:

In addition to initial WIDA ACCESS Placement Testing, students will participate in annual ACCESS testing for ELLs to continue to assess and guide interventions. All FernLeaf students' progress will be monitored through the use of NWEA MAP testing (or other nationally normed assessment) and the mastery learning checklist. Personalized learning plans will be revised and updated accordingly. FernLeaf is committed to providing the highest quality supports and services to students and will follow all state

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guidelines for placement, services, and exit standards based upon assessment/evaluation data. This includes the monitoring of students who have exited LEP identification for a period of two years.

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.*

1. Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.

Students who demonstrate exceptional abilities will be identified through a variety of means. These include but are not limited to: progression through the mastery learning checklist at a rate greater than their peers, above average performance on nationally normed and standardized assessments, and exceptional interest and progress demonstrated through student portfolios and content specific narrative assessments.

When a student demonstrates exceptional abilities their teachers will provide them with challenges above and beyond those of their peers through substantial differentiated instruction. The needs of these students will be met through the use of instructional strategies such as project based learning, experiential learning, blended learning, small group instruction, and opportunities for independent study. These flexible strategies allow students with exceptional abilities to be challenged in a way that is specifically geared toward their individual needs and unique passions and aptitudes.

2. Plans for monitoring and evaluating the progress and success of intellectually gifted students:

Students with exceptional abilities will be evaluated in the same manner as all FernLeaf students. This involves the use of our previously described comprehensive assessment strategy which is designed to evaluate and promote academic, social, and personal growth. Assessments within this approach include but are not limited to: NWEA MAP testing (or other nationally normed assessment), the mastery learning checklist, student portfolio monitoring/evaluation, narrative assessments, personalized learning plans, and all components of the NCREADY model described in the Instructional Program section.

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*

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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)*

1. The process for identifying previously identified Exceptional Children and 504 students is as follows:

*Initially, parents and guardians will be asked to report this information during the initial registration process.

*Once a student has been enrolled, with the consent of the parent or guardian, the appropriate records will be requested from the student's previous school by a designated school official.

*The records request form will clearly ask previous schools for this previous identification and service information for all students to assist in instances where parents and guardians have not indicated that their student has previously been identified EC or 504.

*At any point in this process when it is indicated that a student has previously been identified EC or eligible for 504 supports, and these support records have not been received by FernLeaf, a phone call to the student's previous school will be made and an additional records request form will be sent.

*If these additional requests do not prove successful, the School Director will contact school leadership at the student's previous school directly to request the records and documentation needed to serve the student.

2. The process for identifying students who may be eligible for special education services will be the same as that used to identify and support all at-risk students. The process for identifying students not previously identified as Exceptional Children is outlined below.

When student deficits and/or needs arise, qualified school personnel along with the child's parent/guardian will work together to implement the following process:

*The student's existing personalized learning plan will be reviewed by the student's teacher(s) and parent/guardian, and additional classroom based interventions will be developed (personalized learning plans are not unique to EC students. As previously described, all FernLeaf students utilize them to address academic, social, emotional, and developmental goals).

*These additional classroom based interventions will be implemented and progress monitored for a period of time no less than four weeks.

*If these interventions do not produce progress in the areas of concern, the student's parent/guardian will be notified and a student support team made up of relevant teachers, support staff, and an administrator will develop personalized, data driven, and research-based intervention strategies.

*These interventions will be monitored through weekly data collection.

*If the developed interventions prove successful, they will be continued.

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*If continued interventions do not prove beneficial to the student's academic progress, further screening and evaluation will be considered and additional strategies will be developed and implemented.

*If further screenings and evaluations result in the recommendation for specialized support services, those services will be provided to the student.

*All FernLeaf student evaluations and assessments will be completed by qualified professionals according to the EC Identification Requirements put forth by NC DPI. These qualified professionals will either be FernLeaf faculty members or contracted professionals.

With regard to the federal Child Find mandate, FernLeaf will do everything in its power to identify and support students with disabilities.

(Response to question 3 regarding student records continues below the response to the next question in the space provided for additional information)

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.*

1. FernLeaf's educational program revolves around a project based experiential learning model which allows for a variety of options to meet the needs of students with disabilities. Teachers have the flexibility to modify assignments, adjust grading rubrics, and assist students in finding the appropriate roles in their teams to maximize their learning. In addition, this inherent flexibility in a project based experiential learning model allows students with disabilities to participate in regular classroom projects while continuing to work towards their own individualized goals.

The faculty of FernLeaf will utilize a variety of strategies to meet the diverse needs of students with disabilities. These strategies include providing high quality, dynamic, individualized instruction in the least restrictive environment possible. When necessary alternate educational settings such as small group, one to one, independent study, blended, and other learning environments will be used. EC staff members will serve as co-teachers and mentors for any teachers working with EC students, guiding their instruction to meet the unique needs of students with disabilities.

With regard to additional supports to be provided to students with disabilities, EC staff will be available to work with students one on one, in small group settings, in co-teaching classrooms, and as consultants or mentors. EC teachers will work closely with students and other teachers to ensure all students with disabilities are being supported. Screenings, evaluations, and other therapeutic needs not met internally, will be met through outsource contracts and/or additional hiring as necessary and

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feasible. FernLeaf will make every effort to meet the needs of EC students in the least restrictive environment while understanding that some students may require more intensive services (i.e. individual instruction, specialized classroom settings, and so forth). One EC teacher is provided for in the budget for the first year of operation with an additional EC teacher added in year two. When our EC population exceeds the limit of the services provided by these initial EC teachers, or the needs of this population require additional staff (i.e. one to one support, specialized classroom, etc.) additional EC staff will be hired.

2. Students with disabilities will be guaranteed a Free and Appropriate Public Education through the use of a thorough and clear system of screening/identification, assessment, and monitoring in addition to the use of a variety of education delivery models. FernLeaf's flexible learning model offers individualized and differentiated instruction for all students. Diverse learning settings which employ a variety of instructional methods where teachers are focused on the individual needs of each student will also facilitate meeting the needs of exceptional students. The appropriateness of a special education student's education will be monitored through the use of NWEA MAP testing (or other nationally normed assessments), the mastery learning checklist, formative assessments, teacher observation, mentor meetings, and conferences involving the student, parent, and teacher. Additionally, the process of reviewing each student's Individualized Education Program (IEP) will provide key insight into student needs.

3. Exceptional Children staff will work closely with faculty members, parents/guardians, and identified students on the development and implementation of quality IEPs. Meetings and ongoing collaboration with parents/guardians, teachers, and the identified student will take place to ensure the effectiveness of the plan. Parents/guardians, and when appropriate, students, will be included in meetings and discussions regarding placement and services. Annual and other necessary IEP reviews or addendum meetings will also be held in accordance with the law. The School Director or their designee will oversee the implementation of these guidelines and assure that the needs of all EC students are met.

4. In the event that the previously described screening and evaluation process indicates that an EC student requires a related service such as Speech/Language, Occupational, Physical, or Hearing Impaired therapies, FernLeaf will provide these services through outsource contracts or hiring as necessary.

(Below response is continued from Identification and Records section above)

3.

Requesting Records from previous schools:

When a child transfers into FernLeaf with an existing IEP or 504 Accommodation plan, those records will immediately be requested from the student's previous school. The parent or guardian of the identified student will be asked to sign a release of records form that will be used to obtain these records. In addition to a traditional records request being faxed, a phone call will accompany all records requests for EC and 504 students. The

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purpose of this call is to immediately verify and obtain pertinent information regarding the placement and service needs of students with disabilities and 504 Accommodation Plans so that staff may begin supporting identified students as soon as possible. In cases where records or services information is not received, the School Director will personally contact the previous school's Principal or Director to request this information.

Record Confidentiality (on site):

The confidentiality of students with disabilities and those with 504 Accommodation plans will be respected through the process of storing records in a locking file cabinet and limiting record access to those individuals working directly with the student, the student's parents/guardians, and those with a signed release. A list of individuals who have been approved for access will be posted on the front of the record, and a review log will be kept on the inside of the record.

Record Compliance (on site):

All EC and 504 records will be stored in a locking file cabinet, separate from other student records, in a secure location within the school. EC Records will have their own file drawer or drawers as necessary. Each file will have a file review sheet attached to the front which lists individuals who are granted permission to review the file (i.e. EC Case Manager, all individuals serving the student that year, EC Supervisor, School Director, Assistant Director, etc.). In the front cover of the file will be a review log where individuals who are reviewing the file will record their access.

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.*

1. FernLeaf's student performance standards are designed to ensure that our instructional program promotes and delivers high levels of academic achievement. In order to capture a broad picture of student accomplishment, tangible as well as subjective goals have been created reflecting our previously described comprehensive assessment strategy.

Performance Goal 1:

80% of students will demonstrate growth as evidenced by results from external evaluations such as NWEA MAP testing (or other nationally normed assessment) each year. These assessments will be administered quarterly to help drive instruction and provide teachers, students, administrators, and

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board members with ongoing data to ensure high levels of academic achievement.

Performance Goal 2:

80% of students who have been enrolled for more than 1 year will demonstrate growth as evidenced by results from End of Grade tests. Results from these annual tests will be evaluated by teachers, students, administrators, and board members to drive instruction and ensure high levels of academic achievement. Evidence of goal attainment will be available beginning in year 2 of operation after a baseline is established in year 1.

Performance Goal 3:

80% of students will demonstrate growth annually as evidenced by the addition of high quality artifacts to their individual portfolios demonstrating academic achievement as well as various non cognitive skills associated with FernLeaf's mission such as curiosity, passion, thoughtfulness, compassion, and engagement. A final portfolio evaluation will occur annually and will be used by teachers, students, administrators, and parents, to drive instruction and ensure high levels of academic, social, and personal growth and achievement.

Performance Goal 4:

All students will participate in at least two "major" projects, defined as those that span a period of more than 2 weeks, involve a minimum of 2 grade levels, integrate a minimum of 3 curricular areas, and feature some aspect of community engagement. Data surrounding project scope and progress will be evaluated by teachers, students, administrators, and board members in order to ensure high levels of academic achievement.

2. FernLeaf utilizes a comprehensive assessment strategy that collects and analyzes data from a variety of sources to help ascertain the needs of students and create effective learning experiences. This approach not only allows instruction to be driven by the needs of students, but also encourages flexibility in curriculum implementation to ensure that it is being delivered in a way that is rich, relevant, and engaging to all students as their needs change over time.

FernLeaf's comprehensive assessment strategy incorporates a wide variety of ongoing quantitative and qualitative assessments designed to help students grow while providing continuous academic progress monitoring. In addition to state and federally mandated tests, our strategy includes the use of quarterly NWEA MAP testing (or other nationally normed assessment). These, or other adaptive achievement tests provide teachers with valuable data allowing them to differentiate instruction based on the direct needs of individual students. FernLeaf's comprehensive assessment strategy also includes a specially designed mastery learning checklist for foundational skills in math (see appendix B). This checklist is similar in nature to the new K-3 Formative Assessment currently being developed by the NC DPI Office of Early Learning in that it is not a test, but rather an ongoing assessment process where teachers collect evidence and develop/adjust instruction accordingly. Other components of our comprehensive assessment strategy include content specific narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and personalized learning plans. Personalized learning plans address not only academic goals, but also a host of social,

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emotional, and developmental goals all contributing to high levels of success and well being at school and beyond. Collection and analysis of data from these varied sources allows FernLeaf to reflect on every student and to provide them, their parents, and other stakeholders with a clear and nuanced look at student academic, social, and personal growth and achievement. This assessment strategy is an important part of FernLeaf's efforts to deliver an instructional program that is not available to families in the surrounding LEAs.

Required standardized assessments include adherence to the NCREADY accountability model, including End of Grade tests, 8th grade Math I End of Course test (formerly Algebra I), 8th Grade ACT EXPLORE, and NCEXTEND1/2. NC Final Exams (formerly Measures of Student Learning) are utilized in all content areas for which they exist in conjunction with the teacher evaluation component of the NCREADY model. The WIDA ACCESS Placement Test (W-APT) is used for identification of limited English proficient (LEP) students, and students identified as LEP are administered the ACCESS for ELLs or the Alternate ACCESS for ELLs.

3. In order to be promoted to the next grade level, students in grades K-2 must demonstrate proficiency through a variety of FernLeaf developed assessments in accordance with SBE Policy GCS-C-016 regarding K-2 assessments. Recommendations will be made by a retention/promotion committee based upon review of a variety data concerning a students academic, social, and personal growth and development. Data sources will include scores from End of Grade Tests and NWEA MAP tests (or other nationally normed assessment), student portfolios, teachers' narrative assessments, progression on the mastery learning checklist, student progress in meeting personal learning plan goals, and meeting attendance standards set forth by the Board of Directors. Students in grades 3-8 will be considered for promotion/retention in the same manner as those in K-2, but 3rd graders must also meet state requirements for 3rd grade reading proficiency and promotion set forth in SB-337. Students with special needs will be considered for promotion in the same fashion as all other students, with additional considerations related to these students' IEPs, 504 Plans, LEP status, specific disabilities, and any other relevant factors. The final determination for the promotion or retention of all students shall be made by the School Director in accordance with all applicable laws and in consultation with relevant stakeholders.

Promotion criteria will be communicated to parents and students at the beginning of each year through the FernLeaf Handbook. The handbook will also be available on the school website. When the possibility of retention for any student arises, teachers/administrators will communicate with parents or guardians as early as possible and on an ongoing basis through conferences, phone/email correspondence, etc. The goal of all communication will be to inform parents and students of the risk of retention and to develop appropriate strategies.

4. FernLeaf's exit standards are consistent with our promotion policies and standards as noted above in the previous question. Students in the 8th grade are expected to demonstrate the successful acquisition and application of knowledge and skills set forth in the Common Core and NC Essential Standards for 8th grade. Exit standards for "At-Risk" students are the same as for other students with additional considerations related to these

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students' IEPs, 504 Plans, LEP status, specific disabilities, and any other relevant factors.

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.*

Student Conduct will be governed in a way that is thoughtful, compassionate, and respectful of the entire FernLeaf Community. It will preserve the innate curiosity of children and will always be used as a learning opportunity to assist students in their academic, social, and personal growth and development. Consistent with the school's mission, students will be actively engaged and connected to a community of caring adults and peers enabling them to learn and grow while contributing to a positive and healthy school environment. Research demonstrates that incorporating Social Emotional Learning (SEL) throughout the curriculum allows children to perform better at school and in life. Aspects of SEL that FernLeaf models, teaches, and integrates include: self awareness, self management, relationship skills, responsible decision making, compassion, empathy, mindfulness, positive work ethic, etc. FernLeaf's policies related to student conduct are designed to be clear, logical, and fair, and to provide opportunities for student growth and learning. An initial draft handbook containing policies related to discipline practices, suspension and expulsion, students with disabilities, due process, and grievance procedures can be found in Appendix D. Consistent with our mission, additional principles and policies governing student conduct will be fully development and revised on an ongoing basis with strong input from the entire FernLeaf community including students, staff, administration, and the Board of Directors. All policies and procedures will be developed in accordance with applicable law and the spirit of FernLeaf's mission.

*Requested response items 1-4 are fully addressed in Appendix D.

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Section III: Education Plan Concerns and Additional Questions		
<p>it is unclear how the long list of programs and methodologies listed here will come together to form a cohesive whole.</p> <p>No curricula are specified. Will the applicant develop original curricula? if so, when, and who will lead and execute this work?</p> <p>How do the many assessments listed here fit together, and how do they impact the overall academic calendar?</p> <p>Because the actual target student population is unclear, the effectiveness of the many program elements listed cannot be evaluated. Additionally, it is unclear whether these elements have been used before to drive student growth.</p>	Kristen Vandawalker	Instructiona
<p>The narrative did not include evidence that the proposed approach will lead to improved student performance for the target population.</p> <p>Very little specific detail is included regarding curriculum and attendant materials.</p>	Kathryn Mullen Upton	Instructiona
<p>Where is the assessment rubric that supports the project-based instruction? How is the rubric going to be assessed as a valid assessment that learning is taking place and is aligned to the Common Core and NC Essential Standards? How is student growth going to be collected and used on these project-based assignments?</p>	Brian Smith	Instructiona
<p>The applicant places great stock in the small overall school size, but does not address the difference in class sizes between the local schools and Fernleaf.</p> <p>It is unclear how the curricula (unspecified), EL/PBL models, and vast selection of assessments will work together to provide opportunities for data-driven differentiation. A laundry list of instructional methodologies is presented, it is unclear how teachers will be supported in implementing all of these and possibly creating their own curricula. Again, without a solid picture of what the student body will look like, it is impossible to evaluate the potential for success of the listed methods.</p> <p>The academic calendar indicates only 8 work/PD days before the start of the year. Is this sufficient time, especially for the founding staff, to create culture, prepare a school building and individual classrooms, and provide sufficient development on all topics/methods listed here?</p> <p>What is the purpose of the two weeks of teacher workdays at the end of school? What are there only four full work days? are these PD days? Are the early dismissals PD days as well?</p> <p>Who oversees enrichment on early dismissal days and during intersession? What is the logic for having early dismissal on Mondays?</p>	Kristen Vandawalker	Curriculum a
<p>Beyond the math sample curriculum outline, there is little detail included regarding the full range of programs and services for students in all grades.</p> <p>The calendar does not appear to have sufficient number of instructional days.</p> <p>Appendix B is difficult to follow.</p>	Kathryn Mullen Upton	Curriculum a
<p>In Appendix B, a sample is given for Math grade k-5 and Science for middle school. There is not a sample explanation for Language arts. How are you going to address reading as this is a state wide problem?</p> <p>In appendix C, the calendar has only 171 days in the school year not the required 185. How are you going to make sure the 1025 hrs or 185 requirement is met? How will the 33 early release days impact the parents?</p>	Brian Smith	Curriculum a
<p>When are the PLPs developed, and how is this work undertaken? What are the inputs? what is the content of the PLP?</p> <p>What is an "emergency situation" that would require expedition of the process?</p> <p>What learning environments allow students to progress at their own pace? How does this track with the focus on community and supportive culture?</p> <p>What interim assessments support assessment of progress?</p>	Kristen Vandawalker	Special Prog
<p>It is unclear whether the programming for ELL students entirely teacher-created.</p> <p>Whether the school will utilize any off-the-shelf programs is also unclear.</p>	Kathryn Mullen Upton	Special Prog
<p>How does the four weeks of intervention factor into the 90-day process for initial evaluation? What happens if parents request an evaluation?</p>	Carol Ann Hudgens	Exceptional

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Reviewer recommends that the applicant review the Child Find procedures in the Policies Governing Students With Disabilities.		
Will the registration process be before or after the initial lottery?	Brian Smith	Exceptional
How do the PLPs interact with the 504 or IEP plans of individual students? Is one subject to another? This section demonstrates some, but not thorough, understanding of public school obligations with regard to students with special needs.	Kristen Vandawalker	Exceptional
The plan is very broad, and it is unclear what the actual services would look like when implemented within the school.	Kathryn Mullen Upton	Exceptional
Please clarify what is meant by "When necessary alternate educational settings such as small group, one to one, independent study, blended, and other learning environments will be used." How does this description fall into the continuum of alternative settings as describes in the NC Policies? How is independent study direct instruction? EC Staff description include services as consultants or mentors. How does this fit the definition of specially designed instruction? Unable to determine the applicant's plan for providing related services and support.	Carol Ann Hudgens	Exceptional
How will performance goal 4 be assessed? Is there a rubric that will be used by all evaluators? Board members cannot evaluate student works as it is a conflict of interest. How will you address this?	Brian Smith	Student Perf
Responses are not presented in SMART terms. Portfolios and projects are minimally explained and it is unclear how these elements will be evaluated, and how these align with other required promotion requirements. This section is underdeveloped, and does not clearly present promotion criteria in a clear and succinct manner that allows for understanding of what specific benchmarks must be met for grade to grade promotion and graduation. Board members are mentioned, conflating the relationship between governance and management.	Kristen Vandawalker	Student Perf
Proficiency must be demonstrated on a variety of assessments (to be developed, currently undefined), in order for a student to be promoted. Question for interview: please describe in greater detail what the founding group believes the standard for promotion (and retention) should be. Growth is not defined.	Kathryn Mullen Upton	Student Perf
this section is minimally developed and does not address lower level infractions, nor is there any mention made of supports for positive behavior. The SEL component is not fleshed out, nor is the overall culture of the school and approach to discipline clear. Are only students over 14 able to be expelled? Who is the head of discipline for the school? The process for the collaborative development of the handbook is unclear, and the narrative does not address the questions fully.	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
Tammi Sutton	
Brian Smith	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

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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: FernLeaf Community Charter School, Inc.

Mailing Address: 170 Allison Road

City/State/Zip: Mills River NC 28759

Street Address: 170 Allison Road

Phone: 828-606-6846

Fax: 828-698-6553

Name of registered agent and address: Michael Luplow
170 Allison Road
Mills River, NC 28759

FEDERAL TAX ID: 47-1184515

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)
 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.

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these professional licenses?

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James Roberts on Elliot, III	Vice-Chairperson	BUNCOMBE	Fiber Procurement Manager Evergreen Packaging		
Teresa Walton	Director	HENDERSON	Director of Nurses - Compassionate Home Care		
William Deaver	Director	HENDERSON	Business Owner - Trademark Homescapes		
Barbara Barfield	Treasurer	HENDERSON	Educator		
Jennifer Wadsworth Love	Secretary	HENDERSON	Early Childhood Educator		
Michael Luplow	Chairperson	HENDERSON	Educator		

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.*

FernLeaf will be governed by a board of directors numbering from 5 - 15 with elected officers consisting of chairperson, vice-chairperson, secretary, and treasurer. The roles and responsibilities of the Board of Directors include:

- *Determining the operating and educational program policies that result in academic success and are consistent with the school's mission and vision.
- *Overseeing the fiscal operation of the school, minimizing financial risk, and ensuring prudent financial management.
- *Ensuring that FernLeaf fulfills its charter agreement with the state and adheres to all applicable regulations.
- *Hiring, supervising, and evaluating the School Director.
- *Acting as employer to all staff.
- *Developing FernLeaf's strategic plans.
- *Overseeing fundraising and procuring donated resources from the community.
- *Completing an annual self assessment of the board's performance.
- *Carrying out individual and collective fiduciary responsibilities including the duty of care, duty of loyalty, and duty of obedience.
- *Ensuring compliance with the law, articles of incorporation, and bylaws.
- *Building and maintaining partnerships with the community to insure community input and interaction.

The board will establish a search committee whose responsibility is to

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recruit candidates for the School Director position from known individuals with school leadership experience and/or through a recruitment agency that specifically recruits school administrators. The search committee will consist of board members, parents of prospective students, and once the school is established, teachers and other staff members. Once potential candidates for the School Director have been identified and screened by the search committee, each candidate will be interviewed by board members. The board will vote to make the hiring decision for the School Director.

The School Director is responsible for the day to day operation of the school. As the only employee directly supervised by the board, the school director is the primary link between the school and the board and has responsibility for implementing the mission and vision to ensure the school's success. The School Director is an ex officio non-voting member of the Board of Directors and attends all board meetings to provide data and feedback on the operations, academic progress, and financial situation of the school. The School Director will deliver a monthly report at each regularly scheduled board meeting which will include key indicators of academic progress and success, financial and operational data, and any other items requested by the board or deemed important by the School Director. The board will conduct an evaluation of the School Director's performance that is completed in April of each year. The evaluation instruments utilized will include the North Carolina School Executive Evaluation for Principals. The board will also solicit feedback and input from parents, teachers, and students about the school's performance, the Board of Directors' performance, and the School Director's role through a survey process that will occur at different times throughout the year as outlined in the board's strategic calendar (Appendix J Board Policies Section 207).

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 current members of the FernLeaf board have a broad range of experience including backgrounds in education, business, finance, construction and carpentry, forestry, and public health. Of particular significance is the fact that the board possesses individuals who possess both business/management experience as well as knowledge of the current education system. This allowed the creation of sound and insightful plans for both the academic and business success of the school. Planning has required detailed knowledge of North Carolina's education system and regulations as well as the ability to oversee relevant business aspects. The current board of six includes representatives of numerous stakeholders:

*Successful local business people.

*Parents and community members interested in creating a new educational option.

*Individuals with previous non-profit board experience.

*Individuals with successful experience navigating the Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, Form 1023.

*Teachers with classroom experience at all levels.

*Members of the local community who want to improve their community.

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*Individuals with respected management abilities who prepare and manage budgets, hire and evaluate employees, and assess overall business performance.

The duties and powers of the board are extensive and discussed formally in the bylaws. They include but are not limited to:

*Perform all duties imposed on them by law, articles of incorporation, and bylaws.

*Appoint, remove, and supervise all officers of the corporation.

*Appoint, remove, employ and discharge, prescribe the duties, and fix the compensation of the School Director.

*Establish policies that uphold the law and promote the school's mission.

*Facilitate academic success by ensuring adequate resources and proper financial management.

*Recommend operational priorities and develop short and long term plans for the school.

*Build and maintain partnerships with community stakeholders.

*Assume a leading role in fundraising.

*Complete responsibilities in a reasonably prudent manner.

*Perform all obligations in a manner that puts the interests of the school before any personal interest.

*Promote the mission and vision of the school while carrying out duties and responsibilities.

The School Director is an ex officio nonvoting member of the board and is responsible for implementing plans and programs designed to meet academic, financial, and operational goals established by the Board of Directors. The board Chairperson, together with the School Director, establishes agendas for board meetings, and the board Treasurer works with the School Director to develop and monitor the school's budget and finances. The School Director will present a monthly report at each regular board meeting that will demonstrate the school's progress toward meeting established goals for academic growth and achievement, current and projected financial status, and school operations.

The organizational structure of FernLeaf allows for parent and community member participation at several levels of involvement (see Appendix F). Parents may participate in the parent organization and be invited to be part of a parent advisory committee organized and led by the School Director. Parent participation in board established committees will be encouraged and necessary to the school's success. Parents who express a desire to increase their involvement may be recruited to become a member of the Board of Directors. Community members may also be asked to help contribute specific skills or resources for school operations or board committee work, or to participate in the community advisory group led by the School Director. Representatives of community businesses and organizations who express an interest in establishing such partnerships with the school may also be recruited to become members of the Board of Directors.

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?*

Two local educators, Michael and Molly Luplow, organized an initial meeting with a group of concerned parents, teachers, and community members who sought options for educating their own children and/or the students in this

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area. Bimonthly meetings were held to explore the need for and feasibility of opening a new charter school as well as to develop the mission and vision for the school. Founding board members were identified from within the group and a board member experience matrix was created to identify areas in which additional expertise was needed. People known to members of the original group were approached to determine their level of interest in getting involved with the board. A potential board member information packet was developed and distributed to candidates about the role and commitment required of a FernLeaf board member. Additional information was provided to these candidates as needed. When a candidate expressed interest they were initially screened in individual meetings, and those who possessed the experience, expertise, and commitment needed to create a well rounded board were invited to become a founding board member.

FernLeaf bylaws allow for a board consisting of 5 - 15 members. The current six member board has been highly functional in the initial stages of developing the school's plan, but also recognizes the need to immediately recruit additional individuals with previous non-profit or charter school board experience, and/or who will provide additional expertise in business, accounting, or law as we progress into the planning year. Two of the current board members are parents of potential students, but in order to strengthen the board we will also seek to add 2-3 parents of potential students who possess the previously mentioned backgrounds and experience. We would like to have at least three strong additional board members in place as we begin our planning year. According to our bylaws, the board may determine the exact number of board members within the 5-15 range at its discretion.

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

The board will meet monthly. See Appendix J Board Policies Section 207 for detailed strategic calendar.

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).

Board training is one of the keys to the success of FernLeaf, therefore training begins as soon as an individual expresses an interest in serving on the board. Orientation to the board prior to being elected as a director consists of two steps:

1) All prospective board members are sent a copy of the FernLeaf Board of Directors Orientation Manual along with a letter of invitation to consider becoming a board member.

2) A meeting with current key board members occurs to review the responsibilities and expectations of the Board of Directors and to answer any questions the prospective board member may have.

After election to the board, the new board members will be paired with an existing member who will act as a mentor during the first year of his or her term. The mentor is responsible for helping the new member with any questions about procedures, materials, logistics, or other information related to the board.

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Current board members have participated in training provided by NC DPI for Charter School Boards in 2013-2014 and also special training provided by the North Carolina Charter Accelerator Program on governance and financial management. All members will be required to actively participate in governance training provided by the NC DPI Office of Charter Schools or the State Board of Education that may concern the legal aspects of running a charter school, finance, education codes, or other aspects of effective board governance.

The board will be responsible on an annual basis for determining ongoing governance training necessary to ensure the success of the school and will include training at least once per quarter. Special attention will be given each year to areas where the board has less expertise and outside experts will be called on to provide education and guidance in those areas. Resources that will be used include BoardOnTrack online resources (formerly The High Bar) and National Charter School Resource Center's Governance Best Practices Toolkit. An amount of \$1,000 is included in the initial budget for ongoing board training that will include charter school board best practices, charter school law, financial oversight and audit, conflicts of interest, school academic progress oversight, and any other area where board members indicate training is necessary.

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.*

Upon election to the FernLeaf Board of Directors, each member will sign an agreement to disclose any real or perceived conflict of interest to the board or board committee. A written disclosure will also be required annually from each board member at the start of the fiscal year. At the present time, there are no existing relationships that could pose actual or perceived conflicts of interest if FernLeaf receives preliminary approval. Conflicts of interest may involve financial benefit to a board member or another organization with which they are associated, preferential treatment of children of board members, confidential information about students, staff or other board members, and offers of gifts or complimentary services to a board member. When procuring goods and services over \$500, bids from 3 vendors are preferred but not required if there are not three vendors who indicate the ability to meet the needs of the school. New disclosures of all possible real or perceived conflicts of interest needed during the course of business during the year will be noted in the minutes of the meeting in which the disclosure was made, along with the discussion and results of the decision as to whether a conflict exists. The procedure is outlined at length in Article 10 of the FernLeaf Bylaws (Appendix H-12) which contain the full Conflict of Interest Policy. Each member has a duty to disclose any conflict of interest (defined in Article 10 Section 2b) and will be given the opportunity to present all material facts to the non-interested members of the board or board committee. Discussion of and determination of the existence of a conflict will be made without the interested party present. Decisions regarding compensation to an interested party on the board also exclude the interested party from the discussion and voting decision. The Bylaws (Article 10 Section 3c) are specific in outlining the procedure if a board member neglects to disclose their interest in a matter, and while the interested board member may give explanation as to why they did not disclose, it is up to the board

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(excluding the interested Director) to determine if disciplinary action is required for the Director's failure to report his/her interest. Board members may be removed by action of the Board of Directors according to Article 3 Section 14.

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

The process of developing a new policy will require multiple steps. First, the board will recognize the need for a new policy that may be brought to the board's attention by anyone including the School Director, parents, staff, attorney, regulatory agency, or board members themselves. The matter will be referred to the appropriate board committee for research and drafting. Any party that might be affected by the policy will be consulted for comments or recommendations. The committee discusses the research and develops a general framework for the policy. A draft policy is prepared by the committee, and where needed, an attorney is consulted on sensitive issues. The policy is written according to a uniform policy format adopted by the board. The complete policy is presented at the next board meeting for a first reading and discussion. Revisions may be made to the draft. Generally, the policy will be presented at the next board meeting for a second reading and adoption. If the policy is adopted, then the policy manual is updated and all board members will receive a copy of the new policy. The policy is communicated to anyone it may effect immediately after adoption and is then implemented. The policy is reviewed annually as part of the policy review conducted by the Board of Directors in May and June according to the strategic board calendar (Appendix J Board Policies Section 207). As part of this review, stakeholders will be interviewed to see if the policy has been effective. If necessary, any revisions are proposed and the process for revising and approving a policy begins again.

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.

FernLeaf's organizational structure is designed in line with its mission to create an educational community that is dynamic in its interaction between students, parents, teachers, and the community. There will be four advisory committees or organizations that will function to provide input and support to the School Director in the planning and implementation of school activities, procedures, and curriculum. These committees include:

- 1) Parent Advisory Committee which is appointed by the School Director from members of the school parent organization.
- 2) School Improvement Team consisting of teachers, staff, support personnel, and any other relevant stakeholders.
- 3) Student Advisory Committee consisting of members of the student body.
- 4) Community Advisory Committee composed of representatives from local businesses and organizations who have an interest in an ongoing relationship with FernLeaf.

The School Director will be responsible for organizing and overseeing these advisory committees, and the parent and community advisory committees may have a representative who sits on the Board of Directors as an advisory non-voting member.

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

The grievance procedure is the method where grievances of parents or staff will be resolved fairly and effectively according to the school mission and

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Board policies. No retaliation shall be taken against any individual filing a grievance. A grievance may be filed when information demonstrates that an individual has been treated in a manner that is contrary to board policy, Employment Policies, or the Student Code of Conduct. Except for accusations of a criminal act or breach in the Employee Code of Ethics by the School Director, all grievances will be handled by the School Director according to the following sequential steps and guidelines:

- 1) The School Director should ensure that an informal resolution has been attempted.
- 2) A meeting documented by the School Director is held in an attempt to resolve the grievance.
- 3) The aggrieved party completes a formal written grievance form and presents it to the School Director who will deliver a copy to the Executive Committee of the Board of Directors for review. The written grievance form must be filed within seven days of the previously documented meeting. If the aggrieved party is a staff member, a copy of the written grievance is placed in the employee's personnel file.
- 4) The Executive Committee of the Board of Directors will review the grievance and it will be read and considered by the entire Board of Directors at the next meeting, in closed session if deemed necessary for the preservation of confidentiality. The parties may be invited to that meeting to provide input necessary for the board to make a decision. If necessary, legal consultation will be obtained. The board will advise the School Director on the resolution of the grievance.
- 5) The School Director advises the parties involved of the final decision within seven days following the decision of the Board of Directors.

If the grievance is filed against the School Director then the aggrieved party should deliver the formal written grievance directly to the Chairperson of the Board of Directors after a reasonable attempt has been made to resolve the grievance informally. In these cases the Board of Directors will act as outlined above, but will notify the aggrieved party directly instead of making that the responsibility of the School Director.

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)
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).

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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.

The below outline lays out an effective and practical approach to staffing that is in line with FernLeaf's small school model, project based experiential learning program, and financial planning:

(*asterisks denote new positions added in a given year. Numbers in parenthesis represent total positions)

Year one positions:

- (1) School Director
- (1) Office Administrative Assistant
- (8) Integrated Curriculum Teachers
- (4) Teacher Assistants
- (1) Exceptional Children Teacher

Year two positions:

- (1) School Director
- *(1) Assistant Director
- (1) Office Administrative Assistant
- *(10) Integrated Curriculum Teachers
- (4) Teacher Assistants
- *(2) Exceptional Children Teacher

Year three positions:

- (1) School Director
- (1) Assistant Director
- (1) Office Administrative Assistant
- *(12) Integrated Curriculum Teachers
- (4) Teacher Assistants
- (2) Exceptional Children Teacher
- *(1) School Counselor

Year four positions:

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- (1) School Director
- (1) Assistant Director
- (1) Office Administrative Assistant
- *(14) Integrated Curriculum Teachers
- (4) Teacher Assistants
- (2) Exceptional Children Teacher
- (1) School Counselor

Year five positions:

- (1) School Director
- (1) Assistant Director
- *(2) Office Administrative Assistant
- *(16) Integrated Curriculum Teachers
- (4) Teacher Assistants
- (2) Exceptional Children Teacher
- (1) School Counselor

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The School Director will have primary responsibility for recruiting teachers and may use a variety of resources including local media, job fairs, the FernLeaf website, and teacher recruitment websites. In order to attract and retain the finest teachers, FernLeaf will:

- 1) Ensure a quality work environment that is respectful of teachers by providing: opportunities for growth, leadership, and career advancement; an organizational structure that provides teachers with a strong voice in decision making; a healthy work environment that meets a variety of personal and professional needs; time to plan and develop effective strategies for student learning and professional growth; and thoughtful schedules that support a balanced and healthy lifestyle.
- 2) Recruit teachers known to be exceptional and capable of supporting FernLeaf's mission through their teaching approach and philosophy.
- 3) Offer competitive salaries and benefits that are comparable to the surrounding LEAs.
- 4) Educate strong teachers with proven performance records about general statutes that permit teachers within a LEA to request a leave of absence of one year in order to teach in a charter school (G.S.115C.238.29F(e)(3)).
- 5) Provide support and training to teacher assistants, part time teachers, student teachers, and volunteers who fully embrace the school's mission and approach so that they may transition into a regular teaching position.
- 6) Utilize a teacher training/internship program for teacher assistants who are new to teaching and wish to attain a regular teaching position in the future.
- 7) Partner with area colleges and universities to gain access to high quality student teachers who can learn to effectively work within the

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FernLeaf culture while developing their teaching skills.

8) Provide teachers with information and assistance related to the Federal Public Service Loan Forgiveness Program.

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.*

While the Board of Directors is the employer of all staff, it hires and directly supervises only the School Director. The School Director is responsible for hiring and supervising all other staff. However, the board may assist in staff recruitment by hosting school job fairs for prospective teachers identified from the marketing campaign and student enrollment campaign. The board will see that the school web site has an employment page giving information about FernLeaf employment, staff and teacher requirements, and the application process. The Board of Directors has final approval of all new hires and all employee terminations based on the School Director's recommendation.

It is the policy of the Board of Directors for members to refrain from becoming involved in the day to day management and operations of the school and to delegate that responsibility to the School Director. Board members may not be present on the grounds, enter classrooms, or meet with teachers of the school when school is in session without following established procedures regarding school visitors.

The Board of Directors only directly interacts with employees as part of the employee grievance process described in Appendix O Employment Policies section 490. When an employee completes a written grievance form, the grievance will be delivered to the Executive Committee of the Board by the school Director and considered by the entire board at the next meeting. The board will decide on any action in response to the grievance. The Board will also be involved directly with any employee who files a grievance against the School Director. In this case the aggrieved party should deliver his or her formal written grievance directly to the Chairperson of the Board of Directors. In these cases the Board of Directors will follow the grievance procedure but will notify the aggrieved party directly of the resolution instead of making that the responsibility of the School Director.

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

FernLeaf will conduct a three staged application and interview process for hiring instructional, counseling, and assistant administrative personnel which follows:

- 1) Candidates submit resume and an online application including an original standards based experiential lesson developed by the candidate, and a constructed response explaining why they would be successful at FernLeaf.

- 2) Interviews with the School Director and other staff, as well as satisfactory reference checks.

- 3) "Audition" where candidate is given an opportunity to work with students and is observed for specific behaviors and skills consistent with the FernLeaf mission.

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The School Director will make hiring decisions for all school staff with final approval by the Board of Directors. A satisfactory background check will be completed for all candidates prior to being offered a contract. FernLeaf will follow all laws regarding equal employment opportunities, and will not discriminate against any qualified candidate or employee on the basis of race, color, religion, sex, national origin, age, genetics, or disabilities.

All exempt employees will be employed on a contractual basis not to exceed one school year with no guarantee of contract renewal in subsequent years. New instructional staff and returning staff will be offered a contract for one school year, or until the end of the current school year if employed mid year, with termination for cause language as outlined in NC Statutes for public schools.

Termination of an employee or non-renewal of a contract will be recommended by the School Director and approved by the Board of Directors. Policy details can be found in Appendix J and Appendix O.

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

In order to remain competitive, FernLeaf's initial salary range will match the North Carolina state salary schedule for teachers and support staff. Salaries for all certified teaching staff and counselors will range from \$33,000 - \$55,000 depending on years of experience and degree earned. The salary schedule may be modified annually by the Board of Directors. The School Director and Assistant Director salaries will likewise depend on experience and will range from \$60,000 to \$40,000 respectively up to an amount determined by the Board of Directors. Teacher Assistants will start at \$20,000. Office Administrative Assistants will start at \$30,000. All salary or salary scale increases will be determined annually by the Board of Directors.

FernLeaf plans to participate in the NC State Employees Health Plan. All full time employees and part time employees who work 30 hours or more will participate in the plan. FernLeaf will also participate in the State Teachers' Retirement System. Both of these benefits are offered in order to be competitive with the local school districts as FernLeaf teachers are recruited.

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

Detailed employee grievance procedures are found in Appendix O Employment Policies section 490. A general outline is as follows:

With the exception of the accusation of a criminal act by the School Director, all grievances will be handled by the School Director according to the following procedures:

- 1) An informal resolution attempt between the School Director and those aggrieved.
- 2) A documented meeting with the School Director and those aggrieved.
- 3) A written grievance form is completed by the aggrieved.
- 4) The Executive Committee will review the grievance and it will be read and considered by the entire Board at the next regular meeting.
- 5) The Board will make a final decision on the grievance.

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If the grievance is filed against the School Director then the aggrieved party should deliver the formal written grievance directly to the Chairperson of the Board of Directors after a reasonable attempt has been made to resolve the grievance informally. In these cases the Board of Directors will act as outlined above, but will notify the aggrieved party directly instead of making that the responsibility of the School Director.

Termination Policies and Procedures are found in Appendix O - Employment Policies section 480. Termination procedures will be handled by the School Director who has the responsibility of recommending termination of an employee to the board for approval.

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

FernLeaf will utilize teachers and support staff in the additional role of bus driver. Funding for both positions will come from state funding.

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.

One certified Exceptional Children teacher will be hired for the first year of operation with an additional EC teacher budgeted for the second year in order to ensure that any student in need of additional resources will have sufficient instructional staff that can provide for their needs. The needs of students who demonstrate exceptional ability academically and otherwise, as well as English Language Learners, will be met in the context of the regular instructional setting through the use of strategies described fully in the Education Plan. If an ELL students needs require more supports than can be offered in the regular classroom context, additional accommodations will be provided outside of the classroom. To ensure the availability of any needed external resources for any student with special needs, we have allocated for weekly contracted instructional services at the rate of \$75.00 per hour for 3% of our students the first year and 5% in subsequent years in our budget.

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).

Descriptions with additional detail are found in Appendix J - Board Policies Section 409.

Tasked with sowing the seeds of FernLeaf's culture, image, and identity, the School Director makes key executive decisions in addition to management of every aspect of the school's operations. He or she leads in a way that allows the school to adapt quickly to the changing needs of the school community. The successful Director has a high level of commitment to children and thrives in both professional adult and child centered environments. The Director clearly communicates FernLeaf's vision in a way that provides a sense of ownership to students and staff and facilitates the distribution and development of leadership and responsibility amongst all stakeholders. Qualifications include a minimum of 5 years experience in education, demonstrated managerial skills of leadership, business acuity, human resource insight, and vision implementation. FernLeaf may consider individuals who have demonstrated essential managerial skills in educational settings as well as non-educational settings. A preferred individual will have a masters degree and educational licensure.

The Assistant School Director works closely with the School Director and is

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charged with significant administrative responsibilities including interfacing with any contracted vendors, maintaining licensure records, creating and tracking professional development, and other tasks delegated by the School Director. They are flexible, able to multi-task, and willing to perform any duty associated with school operations. They have demonstrated leadership abilities, strong interpersonal skills, and the ability to plan, organize, and implement projects designed to enhance school performance. In the absence of the School Director, the Assistant School Director will provide continuity in leadership. Qualifications include a minimum of 5 years experience in education along with demonstrated managerial and leadership skills. A preferred individual will have a masters degree and educational licensure.

The Integrated Curriculum Teacher possess a broad knowledge base and will creatively integrate multiple disciplines to make learning engaging, relevant, and meaningful. They should be able to create a loving, compassionate, and respectful climate that allows students to fully engage. Integrated Curriculum Teachers are responsible for teaching content in all four core subject areas (Language Arts, Math, Science, and Social Studies) and to integrate art, music, technology, physical education, and dance into projects and the classroom curriculum. Additionally, they teach more than just content as they teach, model, and integrate ways of learning, doing, and being while facilitating the acquisition of higher level cognitive skills (critical thinking, problem solving, and information and communication technology literacy). They help students develop executive functions (planning, organizing, and multi-tasking) while encouraging creativity. They facilitate both acquisition of social skills and emotional development allowing students to develop functional relationships in and out of school. Teachers utilize knowledge of new technologies to improve instruction. They should be able to demonstrate habitual mental practices that include empathy toward others and reflection on their own actions and practices. Teachers share in the responsibilities of school leadership and are expected to assume responsibility for the success of the FernLeaf Community. Qualifications include successful experience in education along with a demonstrated commitment to children. Educational requirements include a Bachelors degree and appropriate grade level teacher certification.

The Exceptional Children (EC) Teacher will possess the same qualities as the Integrated Curriculum Teacher along with knowledge of the needs of children who require additional strategies and resources. The EC teacher serves as a resource for those students as they participate in school activities with their peers. The EC teacher has the knowledge required to navigate the many legal and procedural aspects associated with this position. Qualifications include previous successful experience as an EC teacher, a Bachelors degree, and EC certification.

Full Time Teacher Assistants provide assistance primarily in the early grades and as such must have patience and loving concern for young students. Assistants will be individuals who are willing to learn first hand under the guidance of an experienced teacher, the skills necessary to become a FernLeaf Integrated Curriculum Teacher. Assistants will be responsible for helping the teacher with classroom management, student needs, and other delegated instructional tasks. They will work to provide instruction, scaffolding, or tutoring with individual students and in small groups, and

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be responsible for supervising students in the classroom or other areas of the school. Assistants are responsive to the personal and educational needs of the students and teacher in the classroom. Preferred candidates will possess a minimum of an associates degree.

The School Counselor creates caring and nurturing relationships with students in order to enhance personal and academic success. Counselors show leadership in creating a caring and supportive environment for students. They advocate for students and the school, locate resources, and collaborate with a variety of entities to help students be successful. They evaluate student needs, utilize group and individual counseling techniques, and utilize their knowledge of human physical, intellectual, emotional, and social growth and development. As FernLeaf's School Counselor has interaction with the entire FernLeaf Community, they should possess outstanding communication and interpersonal skills. Qualifications include at least three years of experience in a related field and a masters degree. Preference may be given to candidates who possess School Counselor Licensure.

Office Administrative Assistants will handle the reception needs of the office and perform school bookkeeping responsibilities. They assist the School Director and Assistant School Director with tasks necessary for the smooth operation of the school and are available to provide administrative assistance to teachers as necessary. Office Assistants utilize effective customer service skills as they encounter parents and other stakeholders. They must enjoy working with children who have a variety of personal needs. They must be highly organized and willing to compassionately assist others. They use technology to access student records and communicate information to parents, teachers, and other outside contacts. They handle the school's interface with the state financial system (ISIS); balance general ledger; process invoices, payroll, and disbursement requests; and track and manage school assets. They will be responsible for PowerSchool input, maintaining student records, reconciling, and producing reports that will be used by the board and school director to make critical decisions. The successful candidate will have previous bookkeeping experience and a minimum of a high school diploma, though a college degree is preferred. Candidates with experience in a school financial office are also preferred. Candidates should also have work experience that demonstrates their ability to manage numerous tasks simultaneously with calm focus.

Staff Evaluation and Professional Development

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

The School Director, along with the School Improvement Team, will oversee teachers' professional development and licensure, but it will ultimately be the responsibility of individual certified staff to ensure that their renewal requirements are met.

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.*

Annual orientation will be provided during the workdays preceding the start of each school year for all teachers in order to affirm the school's mission, establish expectations, provide direction, and immerse new teachers

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into the FernLeaf school culture. Teachers will participate in Staff Development as planned in the school calendar (outlined in responses to the next 3 questions) that will be tailored to the needs of the school and the teacher, and designed to assist teachers in acquiring the necessary credits to maintain licensure prescribed by state law and the appropriate qualifications as defined in NCLB. Teachers who have less than three years of previous teaching experience will participate in FernLeaf's program of support for beginning teachers outlined in the Employment Policies - Appendix O.

As part of the North Carolina Educator Effectiveness System, all teachers prepare a Professional Development Plan (PDP). The School Director or designee will meet with each member of the instructional staff to help create a meaningful PDP that will aid in professional growth and move the teacher along their desired career path. Additionally, teachers will be working as teams to develop project plans and educational experiences that incorporate a variety of disciplines and levels of expertise such that teachers will be consistently sharing knowledge and experiences to help each other develop and grow in their profession. By design, leadership at FernLeaf is delegated to staff. The School Director will evaluate and guide this leadership so as to provide opportunities for development along individually unique paths.

FernLeaf's teacher evaluation will have three components:

- 1) NCEES evaluation.
- 2) Survey evaluation of parents and students.
- 3) Teacher effectiveness in upholding FernLeaf mission goals.

FernLeaf will follow the State Board of Education Policy on Standards and Criteria for Evaluation of Professional School Employees and all instructional staff will participate in the NCEES. This process involves both self assessment and formal and informal observations by peers and the teacher's supervisor. Additionally, the Board of Directors will oversee annual surveys of both parents and students in order to provide feedback on the effectiveness of each staff member. Community is an important part of the FernLeaf mission which includes students and their families, so seeking survey evaluations from parents and students is seen as an essential part of the school staff evaluation process. According to our mission, the FernLeaf Community will nurture the innate curiosity in children, cultivate their unique passions, and create inspired, thoughtful, compassionate, and engaged learners. FernLeaf believes that the NCEES will measure many aspects of teachers' effectiveness in the academic area, but that additional measurements are needed to measure their effectiveness in achieving the whole mission. In addition to survey results, the School Director and Board of Directors may develop additional evaluations to measure teacher's effectiveness in implementing and upholding the mission.

The School Director and Assistant School Director will be evaluated using the North Carolina Standards for School Executives. The School Director will oversee the completion of the Assistant School Director's evaluation process and the Board of Directors will oversee that process for the School Director. Survey results from parents, staff, and students will also be used to evaluate the performance of the School Director and Assistant School Director. Both individuals will also be evaluated using an instrument developed for implementing and upholding the FernLeaf mission.

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Other staff (teachers assistants, office staff, etc.) will be evaluated by the School Director or designee using an evaluation form to be developed by the Board of Directors and School Director based on the responsibilities cited in the job description.

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

There are six core components to FernLeaf's professional development plan:

1) Individualized professional development based on teacher's needs:

Respect for the individual is vital to the creation of FernLeaf's successful school culture. Individualized professional development helps teachers feel challenged and motivated, enhances student learning, helps retain teachers, and nurtures career development.

2) Leadership development and opportunities for teachers:

Staff members will rotate leadership roles in delivering professional development. Select staff will attend external training necessary to implement new strategies and in turn train other staff. Teacher led professional development reinforces FernLeaf's collaborative model and holds staff accountable for their own effective staff development.

3) Implementation of a broad and integrated curriculum:

FernLeaf will implement the curriculum in an integrated manner which is relevant to students and builds on their natural curiosity. Teachers will need to learn to collaborate effectively with each other and their students.

4) Changes and new policies as a result of state and federal requirements:

Training teachers thoroughly in requirement changes allows them to determine the best approach for adherence to regulatory standards, the school mission, and the educational plan.

5) Implementing comprehensive assessment strategy:

FernLeaf's comprehensive assessment strategy includes a variety of assessments. Training teachers to develop, understand, and use these assessment strategies will allow them to differentiate instruction and is key to a complete assessment of student growth, learning, and success.

6) Project development and implementation:

Utilizing projects as a strategy is a primary feature of FernLeaf's instructional program. Learning to develop and implement projects that maximize student learning by integrating multiple aspects of the curriculum will require ongoing staff training and development.

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 FernLeaf school calendar allows for 8 staff professional development and workdays prior to students' arrival at the beginning of the school year. Five days will be devoted to professional development and approximate time frames and topics that will be included in this initial orientation training are as follows:

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Day 1 - The FernLeaf Mission and establishing a rich educational setting where learning is relevant and engaging, and staff is compassionate and respectful of all students and each other:

- *School policies and procedures.
- *Student policies and expectations.
- *Staff policies and expectations.
- *State mandated trainings (i.e. Blood borne Pathogens, School Safety, etc.).
- *Training on the North Carolina Educator Effectiveness System.
- *FernLeaf operational procedures as related to the teaching staff.
- *Using PowerSchool and other school wide technology/programs.

Days 2 & 3 - School wide instructional strategies for success:

- *Implementing experiential learning with project and place based activities to engage students.
- *Using differentiated instruction, personalized learning plans, and individual mastery learning checklists.
- *Implementation of blended learning environments within the broader school framework.
- *Integration of social and emotional learning in the classroom.
- *Inclusion of student directed learning in the school setting.
- *Embedding community service in the curriculum.
- *Implementation of student modifications in the classroom to meet IEP and 504 accommodation requirements.
- *Working with ELL, AIG, and EC students in the regular classroom.

Days 4 & 5 - Familiarization with FernLeaf comprehensive assessment strategies:

- *Culture of reflection.
- *Mastery learning checklist model.
- *Content specific narrative assessments.
- *Student portfolios.
- *Technology based assessments.
- *Personalized learning plans.
- *Formative and summative assessments.
- *Quantitative and qualitative assessments.
- *Self assessment.

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.

The FernLeaf calendar was intentionally designed to create a teaching environment that allows teachers to research and to become knowledgeable about educational innovations and research-based strategies. A positive environment for teacher development must include sufficient time to acquire skills and to practice using those skills. Our school calendar allows for up to 308 hours of professional development/work days where students are not present. This includes 22 professional development/work days during the school year as well as a weekly early student release schedule every Monday to allow for four hours each week in which staff development and planning may occur. This regular weekly planning time will be used in part to include new strategies learned during professional development sessions into the classroom.

Enrollment and Marketing:

- Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your

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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)).

A primary goal of all marketing efforts is to drive people to the well established website which has been in operation since March, 2013. The website provides families and community members with detailed information and allows them to request additional information. While traditional public advertising will be necessary to create awareness/interest and drive people to the website, creating strong "word of mouth" marketing is equally vital to the overall campaign. We recognize that the success of the school hinges on an effective marketing campaign, and as such have budgeted \$7,000 for the first year and \$5,000 for the next 4 years.

By directing marketing efforts to all areas of the local community and ensuring that information materials are available in English and Spanish, FernLeaf will attract a student body that closely mirrors the racial/ethnic and demographic makeup of the surrounding area (see Diversity Analysis in Appendix A). Initial and future marketing efforts will be developed with this in mind as a rich learning community is a component of our mission.

In an effort to accumulate meaningful data surrounding which aspects of the marketing campaign have been most successful, families will be asked to provide information regarding how they became aware of FernLeaf. This question will be present on the FernLeaf application and other enrollment documents. It is currently a part of the contact form on the website, and HTML code embedded within the website provides significant data regarding where traffic is coming from. This data will be used to develop more efficient, targeted, and economical campaigns in the future.

Excerpted from appendix U-3, the overall marketing plan will include:

*\$190 Print Materials. Quote from Vistaprint (100) 8.5 X 11 Flyers \$100 (500) Rack Cards \$90

*\$0 Informational booth at the Henderson County Kindergarten Readiness Fairs (April, 2016). Cost for materials to be distributed accounted for in Print Materials.

*\$0 Public informational meetings at libraries, county offices, and other public spaces where available (September 2015 - July 2016). Costs for materials to be distributed accounted for in Print Materials.

*\$0 Presentations to local Pre-K programs, churches, and other area youth organizations (September 2015 - July 2016). Costs for materials to be distributed accounted for in Print Materials.

*\$250 Informational booths at local festivals, parades, farmers markets, etc. Possible events include: Hendersonville Apple Festival Sept 2015, Brevard White Squirrel Festival May 2015, Hendersonville Christmas Parade 2015, Hendersonville 4th of July Parade July 2015 & 2016, Asheville Brewgrass Festival September 2015, Asheville Art in the Park June/October 2015 and June 2016). Costs include registration fees quoted by various local events ranging from \$30-\$100. Costs for materials to be distributed

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accounted for in Print Materials.

*\$3,500 Billboard advertisements (January 2016). Costs include estimates from Lamar for 4 week campaign.

*\$300 Website. Based on 2013 and 2014 invoices.

*\$1,500 Local print media advertisements (January - May 2016). Mountain Xpress: \$225/ad for 4 weeks = \$1000. Hendersonville Times-News: 4 Sunday papers = \$200. Other = \$300

*\$1,200 Social Media. General Outreach and communication \$0. Paid advertising \$1,200/year based upon July 2014 billing.

*\$0 Press releases issued to local media outlets (April 2015 and April 2016).

*\$0 Public Service Announcements (Early 2016).

*\$0 Door to door outreach in strategically targeted communities (April 2016). Costs for materials to be distributed accounted for in Print Materials.

*\$0 Informational flier distribution (English and Spanish) at local child care facilities, libraries, churches, retail establishments, restaurants, grocery stores, etc. (Ongoing). Costs for materials to be distributed accounted for in Print Materials.

*\$0 Personal outreach by all board and committee members (ongoing).

Total cost = \$6,940

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.*

1. FernLeaf's website will be one of the primary sources of information for parents and community members about the school's mission, vision, and approach. It will also contain all necessary application and enrollment information and other relevant information for parents, students, and prospective staff. Our marketing plan includes numerous ways to engage parents and community members on a personal level after preliminary approval has been granted. These include:

*Attending the Henderson County Kindergarten Readiness Fair.

*Attending festivals, parades, street fairs, farmers markets, etc.

*Establishing contact and partnerships with local community organizations i.e. Henderson/Buncombe County Boys and Girls Clubs.

*Holding public informational meetings for prospective families in various locations.

*Scheduling presentations with local child care centers, Pre-K programs, churches, and other area youth organizations.

*Contacting local employers to make them aware of the school, to begin to develop partnerships, and to ask them to make employees aware of the proximity of the school.

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*Utilizing Public Service Announcement (PSA) opportunities from local news outlets and radio/TV stations.

*Continued outreach through social media outlets.

From the enrollment period through the opening of the school, parents and community members will be engaged by:

*Holding open house events.

*Encouraging parents of enrolled students to volunteer in the development of the school.

*Establishing the parent organization early on during the enrollment period.

*Hosting orientation sessions immediately prior to the school's opening.

2. A high level of parent engagement is a critical component of FernLeaf's approach. Strategies designed to build strong relationships and strengthen support for student learning include:

*Establishing and maintaining frequent and meaningful two way communication between parents and school:

Parents will receive regular and frequent progress reports about their children's growth and learning at school. The PowerSchool parent portal will be readily available permitting parents an up to date view of their children's academic performance. Additionally, the school website will be a major form of communication between the school, teacher, and parent. Both parents and teachers will be encouraged to utilize email, text messages, and other types of electronic communication to effectively communicate with one another.

*Providing support and education to parents in their role as responsible caregivers, and to help them with their essential role in assisting student learning:

Through the FernLeaf parent organization, relevant programs will be offered to help parents become involved in their children's education in a positive way. Workshops and other resources designed to support families will be offered.

*Giving parents a voice in the decision making that affects their children and the school:

The FernLeaf Parent Organization is a place where parents may learn from and share ideas with other parents, the School Director, and staff in a friendly atmosphere. Parents who wish for more involvement may become part of the Parent Advisory Board. This body meets regularly with the School Director and is a place for parents to contribute to the school's growth and development and to remain informed of the school's achievements and challenges.

*Providing opportunities for parents to assist and feel welcome in the school:

Parents will be invited to attend public displays of learning, project presentations, and will be called to become involved directly in student projects that involve their businesses, work, or hobbies. Numerous classroom volunteer opportunities will be available. Volunteers will be

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sufficiently trained so that they may play an effective and rewarding role to better the FernLeaf community.

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.*

Appendix J Sect. 6 contains full admissions policy.

1.The application period will open in January 2016 after SBE approval and will close on 3/15/16. If applications exceed the number of available slots for any grade level, a lottery process will be used. If applications do not exceed available slots, all applications will be accepted for enrollment.

2.All students with a completed application submitted during the open enrollment period will be placed on a list of students for their respective grade level and assigned a lottery number. This list will be available for public review for 60 minutes prior to the lottery. Numbers will be drawn by a disinterested party in a video taped public lottery and students will be numbered for acceptance with an order of entry assigned and recorded according to the order drawn. Multiple birth siblings will be entered as one number into any grade level lottery that is needed with the order of entry drawn for that number applicable to all of the multiple birth siblings. The order of entry number will determine the order for filling available student slots in each grade. Students whose numbers remain on the order of entry list after all openings are filled will form a waiting list for that grade level in that same order.

Per G.S. 115C-238.29F(g) and SB 793, enrollment preference will be given to:

*The children of board members.

*The children of full-time faculty and staff.

*The siblings of currently enrolled students who were admitted in a previous year.

*Currently enrolled students.

*Siblings of students who have completed 8th grade and who were enrolled in at least four grade levels.

*A student who was enrolled within the two previous school years but left (i) to participate in an academic study abroad program or a competitive admission residential program or (ii) because of the vocational opportunities of the student's parent.

Students who have been expelled or suspended from a public school under

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G.S.115C-390.5 through G.S. 115C-390.11 will be admitted only after the period of suspension or expulsion has expired or upon the approval of the Board of Directors.

Children of board members and staff shall not exceed 15% of the school population. If this number exceeds 15%, a separate lottery will be held to determine the order of acceptance for these students. Students will not be discriminated against due to ethnicity, gender, disability, academic ability, or other such distinguishing qualities.

3.Any students whose lottery numbers remain on the order of entry list after all openings are filled will be placed on a waiting list established for that grade level in that same order. Applications received following the lottery proceedings will be placed at the end of the waiting list for the appropriate grade. The School Director will notify students according to the waiting list when a student opening occurs.

Student withdrawals are to be submitted in writing by a parent/guardian to the School Director. Once withdrawal paperwork has been completed the request will be processed within two school days.

Any student wishing to re-enroll after an official withdrawal will be required to complete a new application for admission and is subject to the same procedures as new applicants. Currently enrolled students do not need to re-apply but will be asked to communicate their intent to remain enrolled for the following school year.

Student transfers for those leaving FernLeaf will be processed in a timely manner with records being forwarded to the appropriate school. For students transferring into FernLeaf, once a completed application is on file and enrollment paperwork has been completed, records will be requested from the previous school.

4.A series of pre-admission informational meetings for potential parents/students may be conducted. The purpose of these meetings is to provide information about FernLeaf and the admission process, and in no way implies any enrollment commitment.

5.See #3.

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PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Henderson County Schools
 LEA #2 Buncombe County Schools
 LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000
Kindergarten	28	12	0	28	12	0	28	12	0	28	12	0	28	12	0
Grade 01	31	13	0	31	13	0	31	13	0	31	13	0	31	13	0
Grade 02	31	13	0	31	13	0	31	13	0	31	13	0	31	13	0
Grade 03	34	14	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 04	0	0	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 05	0	0	0	0	0	0	34	14	0	34	14	0	34	14	0
Grade 06	0	0	0	0	0	0	0	0	0	34	14	0	34	14	0
Grade 07	0	0	0	0	0	0	0	0	0	0	0	0	34	14	0
	124	52		158	66		192	80		226	94		260	108	

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

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.

FernLeaf's transportation plan includes a variety of strategies designed to ensure access to the school, strengthen the FernLeaf Community, encourage diversity, actively promote FernLeaf's values, develop community partnerships, and assist in ongoing marketing efforts.

Carpooling:

In an effort to facilitate access to the school, strengthen the FernLeaf Community, and promote FernLeaf's values, a comprehensive carpooling program will be implemented. The School Director and Parent Organization will work together to develop and promote a program not just for individuals who lack transportation, but also as a tool for promoting community building, conservation, and environmental stewardship. We will utilize internet and mobile based carpooling platforms such as carpoolassist.com (free for charter schools) and carmacarpool.com (free app) which will allow the FernLeaf Community to easily coordinate effective ride-share opportunities. The program will be heavily promoted through the school website, Facebook page, and direct communication with families. Beyond promoting carpooling to the school itself, we will also encourage families to share rides to our school bus pick up and drop off locations as well as to meeting places for our walking school busses and bicycle trains described below.

Bus:

\$15,000 has been budgeted for one used bus for the first two years of operation and a total of \$30,000 in each subsequent year allowing for acquisition of a 2nd bus beginning in year three. We will continually develop and revise strategic pick up and drop off locations designed to facilitate access to the school and promote diversity. Locations will include large commercial shopping sites with easy access by the broader community as well as targeted neighborhoods, apartment/townhome complexes, and trailer parks. As previously mentioned, families will be encouraged to carpool to pick up and drop off sites to further promote conservation and environmental stewardship. FernLeaf will also coordinate parent volunteers to provide supervision at these sites. Busses will be clearly marked with FernLeaf's name, logo, and other information designed to attract attention and contribute to overall marketing efforts.

Walking school busses and bicycle trains:

Dependent upon the actual location of the school, FernLeaf will coordinate the development of safe routes for walking school busses and bicycle trains. These are simply adult supervised groups of students who walk/bike together on a preplanned route at specific times. Routes will be developed for those who live within a reasonable proximity to the school. Additional routes originating from specified locations like parking lots or neighborhoods will be developed to provide opportunities for students who do not live within walking/biking distance. These routes provide students opportunities for exercise and socialization while also contributing to a public display and

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marketing of FernLeaf's underlying values. These programs may operate on a daily, weekly, or monthly basis dependent upon interest and participation. To enhance safety and contribute to overall marketing efforts, all walking school busses and bicycle trains will bear signage informing the community of who they are and what they are doing.

Incentives:

FernLeaf will actively reach out into the community to develop incentives for families who participate in our carpooling program with extra incentives provided to those who walk or bike to school. This will include reaching out to local businesses to provide gift certificates, discounts, etc. to those who participate in our transportation programs while simultaneously providing these businesses with marketing opportunities.

Costs:

As described above, the only costs associated with the different components of the transportation plan are those for the bus. These costs account for 8-10% of annual expenses and include monthly debt service, fuel, driver pay, and maintenance for each bus.

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.

In year one, most students will bring lunches from home, with students who are unable to do so being provided the opportunity to participate in a lunch program. Eligibility will be determined by an income survey utilizing the National School Lunch Program Income Eligibility Guidelines to determine which students fall within the Federal Poverty Guidelines and therefore qualify for the program. Families will be notified of their eligibility and will indicate to the school their intent to participate in the program.

After daily attendance, a staff member will prepare lunches for program participants and discretely distribute them. Measures will be taken to preserve these students privacy. Regardless of program participation, any student who fails to bring a lunch will be provided with a meal. All students will eat lunch in classrooms with microwaves available.

Investigation of a similar lunch program indicated the cost to be on average \$2/student. The 2010 Census on Poverty shows 21% of individuals ages 5-17 fall below the poverty line in Henderson County resulting in 37 of our 176 initially enrolled students qualifying for the program. Other schools have suggested 10-50% of qualifying students will participate. We have elected to estimate using 50% resulting in 19 students who will participate at a total year one program cost of \$6,498.

Comprehensive health and wellness is a component of our instructional program and allows students to develop healthy eating habits. We will also support parents by providing education and training on nutritional guidelines and healthy eating. Our long term goal is to develop a comprehensive food program that may include participation in the "Growing Minds" Program (which connects local farmers, distributors, and schools),

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partnerships with local vendors and restaurants who share our commitment to healthy eating, onsite gardens, and ultimately a self sufficient program offering healthy food options to all students.

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		\$1,319.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$2,381.00
Property Insurance	\$100,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$1,150.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$6,695.00
Total Cost			\$12,327.00

*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.

fernleaf 09/20/2014

(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.

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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 board began working with a local real estate agent in the Fall of 2013 to begin identifying and evaluating a variety of sites to meet the school's needs. Several properties have been evaluated in order to form a baseline understanding of availability, costs, locations, and features. The board has created a facilities committee and selected a facilities advisor who will advise the board on issues related to obtaining an Educational Certificate of Occupancy as well as facility procurement and development in general. The facility committee has had preliminary discussions with both the Henderson County permitting/zoning office as well as with the fire marshal in order to gain a better understanding of requirements. The steps the facilities committee and board will take to acquire a facility and obtain an Educational Certificate of Occupancy are outlined below:

- 1) Continually identify properties that meet established criteria and/or have the potential to be quickly and easily renovated to meet FernLeaf and Local/State Educational Occupancy requirements (Ongoing until August 2015).
- 2) Narrow down the number of potential properties through multiple site visits and consultation with the board's facilities advisor, real estate agent, and any other relevant parties i.e. municipal and county officials (June 2015 - August 2015).
- 3) Request technical assistance and support from the NC DPI School Planning Office as necessary (June 2015 - June 2016).
- 4) Identify preferred site by September, 2015.
- 5) Obtain official cost estimates for needed renovation/construction and compare with budgeted plan for facilities to make final selection and enter negotiations (September 2015 - December 2015).
- 6) Negotiate terms of lease by January 2016 (leveraging recent legislative changes contained in G.S. 105-275 regarding properties excluded from tax).
- 7) Finalize renovation plans and timetable to ensure completion by June, 2016.
- 8) Oversee progress of all site prep, renovations, etc. (January 2016 - June 2016).
- 9) Work with appropriate local and state agencies to obtain Educational Certificate of Occupancy by June, 2016.

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.

\$8.43/sq ft based upon comparisons of a variety of property types with data provided by our current real estate agent with Preferred Properties Asheville, information provided by Whitney Commercial Real Estate, as well as loopnet.com.

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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.*

In the event that the identified facility is unable to open as scheduled, a temporary facility will be sought in a reasonable proximity to our targeted location. The temporary facility must be able to quickly meet Educational Occupancy requirements and have the space for a minimum of 8 classrooms, office space, and adequate storage space. Location must also be able to accommodate traffic flow and safe student pick-up/drop-off. The search for a contingent facility will continue with the assistance of the board's facilities advisor and real estate agent on an ongoing basis as a part of our permanent facility search.

Three contingency options that would be considered:

- 1) Lease space in an existing office or retail location that can be quickly developed to meet educational occupancy requirements and is sufficient to launch the school despite not fully meeting FernLeaf's preferred criteria.
- 2) Lease facilities from an area church, school, or other organization with available classroom space until permanent facilities are identified.
- 3) Lease vacant land and install basic modular units until preferred facilities are ready. The board has established contact with multiple modular companies and established baseline pricing and procedures.

In addition to the general contingency options above, the board will develop a formal detailed contingency policy that addresses the specifics of what will happen in a variety of emergency scenarios which might prohibit the preferred facility from being ready on time. The board is familiar with a charter school in the region whose facilities were not completed in time due to weather and recognizes the importance of preparing a detailed plan to guide the board, school staff, and families through a potentially tumultuous start-up. The facilities contingency plan will include at a minimum, plans/policies related to:

- *Options for temporary location(s) and facilities.
- *Timeline for moving into permanent facilities.
- *Logistics associated with moving from the temporary alternate location to the planned facility.
- *Transportation of students to/from the temporary alternate location.
- *Traffic patterns and considerations.
- *Communication with the entire FernLeaf Community before, during, and after the contingency plan is implemented.
- *Accommodating families to the extent possible to ensure full enrollment.
- *Anticipating and addressing potential concerns from families and the local community surrounding the temporary alternate facility.
- *Ensuring available academic opportunities and experiences are consistent with the mission and instructional program.
- *Communication and technological considerations.
- *Maintaining trust and respect for the board, school leadership, and staff.
- *Ways to capitalize on a difficult situation to strengthen the FernLeaf

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Community.

This policy will be communicated publicly through our mailing/phone lists, website, and Facebook page in order to inform families of potential applicants and enrolled students of what to expect in the event that our proposed facility is unable to open on time. This is critical in ensuring a successful start-up that maintains full enrollment and the respect and support of the FernLeaf Community.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
What is the transportation plan for students with disabilities that have special transportation as a related service in their IEP?	Carol Ann Hudgens	Transportati
Question: are incentives to families permitted?	Kathryn Mullen Upton	Transportati
What is the basis for the cost of a used bus at 15k? Who will drive the bus (no bus driver in staff list? or is this number inclusive of a lease, driver pay and fuel/maintenance???) who is responsible for coordinating the carpools in advance of the first day of school and developing the parent connections that will be required? have the named apps been used successfully by other charter schools? does the dependence on carpooling create a barrier to entry for lower income families? how do walking school busses and bicycle trains carry signage? do these methods unfairly favor higher-income families? what is the purpose of the incentive program? does this create a culture of haves/have nots? it seems to afford a bonus to those who happen to be lucky enough to live near the school?	Kristen Vandawalker	Transportati
How will you make the projected school enrollment if transportation prevents students from getting to the school?	Brian Smith	Transportati
why will the students eat in classrooms? why will a microwave be provided? this seems unrealistic for small children with a short lunch period. what is the basis for assuming that a staff member will prepare the lunches? what is the basis for needing to "discretely" distribute them? why is there a presumption of stigma attached to FRL? what is this based on? what "other schools" have suggested that not all eligible families will avail themselves of the FRL?	Kristen Vandawalker	School Lunch
Of the identified students (19) will they be eligible to ride the bus on the first day of school? There is a concern that the expense of supplying meals until the students qualify for the National School Lunch Program may cost the school more money than anticipated. How will that impact your beginning budget?	Brian Smith	School Lunch
Appendix P didn't include the name of the insurance company that provided the quote. Question for interview: which company provided the quote?	Kathryn Mullen Upton	Civil Liabil
How will location impact student enrollment?	Brian Smith	Facility and
Contingency plan does not name potential sites. Question for interview: what are the possible contingency sites?	Kathryn Mullen Upton	Facility and
This section is underdeveloped and lacks the specificity required to demonstrate that the applicant has a clear understanding of the time-sensitive nature of this work. If the board has been working with a real estate agent for over a year, why are no specific facilities identified? who is the "facilities advisor" and what is this person's role? What technical support would the DPI provide? What is the rationale that supports this timeline. Unless a turnkey or nearly complete school building is identified, on what basis does the applicant believe that the school can be prepared for students in six months? If the facility is not prepared until January, ow will this affect the marketing and recruitment programs?	Kristen Vandawalker	Facility and

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

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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 1st 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 #1 450 - Henderson County Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,580.98	124	\$568,041.52
Local Funds	\$1,532.49	124	\$190,028.76
Federal EC Funds	\$3,768.11	16	\$60,289.76
Totals			\$818,360.04

LEA #2 110 - Buncombe County Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,592.46	52	\$238,807.92
Local Funds	\$1,853.49	52	\$96,381.48
Federal EC Funds	\$3,485.40	7	\$24,397.80
Totals			\$359,587.20

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

INCOME: REVENUE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
-State ADM Funds	\$806,849	\$1,026,140	\$1,246,027	\$1,465,914	\$1,685,801
-Local Per Pupil Funds	\$286,410	\$364,464	\$442,517	\$520,571	\$598,624
-Exceptional Children Federal Funds	\$84,688	\$110,498	\$129,057	\$136,027	\$176,911
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$1,177,947	\$1,501,102	\$1,817,601	\$2,122,512	\$2,461,336

***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.

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:															
School Director	1	\$60,000	\$60,000	1	\$65,000	\$65,000	1	\$71,000	\$71,000	1	\$73,130	\$73,130	1	\$74,590	\$74,590
Assistant School Director	0	\$0	\$0	1	\$45,000	\$45,000	1	\$46,990	\$46,990	1	\$48,400	\$48,400	1	\$49,368	\$49,368
Office Administrative Assistant	1	\$30,000	\$30,000	1	\$30,600	\$30,600	1	\$31,213	\$31,213	1	\$32,147	\$32,147	2	\$32,791	\$65,582
School Counselor	0	\$0	\$0	0	\$0	\$0	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,024	\$42,024
Substitutes	1	\$2,600	\$2,600	1	\$3,200	\$3,200	1	\$3,600	\$3,600	1	\$4,000	\$4,000	1	\$4,400	\$4,400
A - Total Admin and Support:	3		\$92,600	4		\$143,800	5		\$192,803	5		\$198,877	6		\$235,964
Instructional Personnel:															
Integrated Curriculum Teachers	8	\$36,500	\$292,000	10	\$37,230	\$372,300	12	\$37,975	\$455,700	14	\$38,734	\$542,276	16	\$39,509	\$632,144
Exceptional Children Teacher(s)	1	\$38,500	\$38,500	2	\$39,270	\$78,540	2	\$40,053	\$80,106	2	\$40,857	\$81,714	2	\$41,673	\$83,346
Teacher Assistants	4	\$20,500	\$82,000	4	\$20,910	\$83,640	4	\$21,328	\$85,312	4	\$21,755	\$87,020	4	\$22,190	\$88,760
B - Total Instructional Personnel:	13		\$412,500	16		\$534,480	18		\$621,118	20		\$711,010	22		\$804,250
A+B = C - Total Admin, Support and Instructional Personnel:	16		\$505,100	20		\$678,280	23		\$813,921	25		\$909,887	28		\$1,040,214
Administrative & Support Benefits															

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Health Insurance	2	\$5,378	\$10,756	3	\$5,378	\$16,134	4	\$5,378	\$21,512	4	\$5,378	\$21,512	5	\$5,378	\$26,890
Retirement Plan--NC State	1	\$14,084	\$14,084	1	\$21,385	\$21,385	1	\$28,778	\$28,778	1	\$29,641	\$29,641	1	\$35,221	\$35,221
Medicare	1	\$1,343	\$1,343	1	\$2,085	\$2,085	1	\$2,796	\$2,796	1	\$2,884	\$2,884	1	\$3,422	\$3,422
Social Security	1	\$5,741	\$5,741	1	\$8,916	\$8,916	1	\$11,953	\$11,953	1	\$12,330	\$12,330	1	\$14,630	\$14,630
D - Total Admin and Support Benefits:	5		\$31,924	6		\$48,520	7		\$65,039	7		\$66,367	8		\$80,163
Instructional Personnel Benefits:															
Health Insurance	13	\$5,378	\$69,914	16	\$5,378	\$86,048	18	\$5,378	\$96,804	20	\$5,378	\$107,560	22	\$5,378	\$118,316
Retirement Plan--NC State	1	\$62,741	\$62,741	1	\$81,294	\$81,294	1	\$94,472	\$94,472	1	\$108,145	\$108,145	1	\$122,326	\$122,326
Social Security	1	\$25,575	\$25,575	1	\$33,138	\$33,138	1	\$38,509	\$38,509	1	\$44,083	\$44,083	1	\$49,863	\$49,863
Medicare	1	\$5,982	\$5,982	1	\$7,750	\$7,750	1	\$9,007	\$9,007	1	\$10,309	\$10,309	1	\$11,662	\$11,662
E - Total Instructional Personnel Benefits:	16		\$164,212	19		\$208,230	21		\$238,792	23		\$270,097	25		\$302,167
D+E = F - Total Personnel Benefits	21		\$196,136	25		\$256,750	28		\$303,831	30		\$336,464	33		\$382,330
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	8		\$124,524	10		\$192,320	12		\$257,842	12		\$265,244	14		\$316,127
B+E = H - Total Instructional Personnel (Salary & Benefits)	29		\$576,712	35		\$742,710	39		\$859,910	43		\$981,107	47		\$1,106,417
G+H = J - TOTAL PERSONNEL	37		\$701,236	45		\$935,030	51		\$1,117,752	55		\$1,246,351	61		\$1,422,544

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

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
	Administrative & Support:					
Facilities	Facility Lease/Mortgage	\$111,803	\$142,296	\$172,788	\$203,280	\$233,773
	Operating And Fixed Costs	\$39,732	\$50,567	\$61,404	\$72,240	\$83,076
	Furniture	\$18,000	\$5,000	\$5,000	\$6,300	\$7,002
Transportation	Transportation Plan	\$15,000	\$15,000	\$30,000	\$30,000	\$30,000
Professional Contract	Audit And Irs 990 Fees	\$11,000	\$11,330	\$11,670	\$12,020	\$12,381
	Legal Counsel	\$3,320	\$3,420	\$3,522	\$3,628	\$3,737
Office:	Financial Software And Training	\$7,000	\$0	\$0	\$0	\$0
	Communications & Telephone	\$3,150	\$3,450	\$3,900	\$4,050	\$4,800
	Computers & Software	\$2,000	\$1,000	\$1,000	\$2,000	\$2,000
	Office Supplies For Support Staff	\$1,600	\$2,400	\$3,200	\$3,200	\$4,000
Other	Marketing	\$7,000	\$5,000	\$5,000	\$5,000	\$5,000
	Insurance	\$12,327	\$13,867	\$15,407	\$16,947	\$18,489
	Child nutrition	\$6,653	\$8,467	\$10,282	\$12,096	\$13,910
	Enrollment Contingency Fund	\$109,353	\$139,176	\$168,999	\$198,823	\$228,646
	501c3 Filing Costs	\$3,000	\$0	\$0	\$0	\$0
	Background Checks	\$500	\$500	\$500	\$500	\$500
	K - TOTAL Administrative & Support Operations	\$351,438	\$401,473	\$492,672	\$570,084	\$647,314
	Instructional:					
Classroom Technology	Computers And Instructional Technology	\$29,758	\$11,558	\$10,522	\$30,998	\$30,998
Instructional Contract	Contracted Education Services	\$11,880	\$17,640	\$24,480	\$32,400	\$41,400
Books And Supplies	Instructional Materials/Texts	\$7,000	\$8,000	\$9,000	\$16,000	\$21,000
	Project Resources	\$6,000	\$7,500	\$9,000	\$14,000	\$16,000
	Copy Costs (Includes Paper)	\$4,398	\$5,591	\$6,789	\$7,987	\$9,185
	Other Classroom Supplies	\$3,000	\$3,750	\$4,500	\$5,250	\$6,000
Books and Supplies	Testing Supplies	\$3,112	\$3,938	\$4,764	\$5,590	\$6,416
Other	Professional Development	\$4,000	\$4,800	\$5,400	\$5,800	\$6,400
	L - TOTAL Instructional Operations	\$69,148	\$62,777	\$74,455	\$118,025	\$137,399
	K+L = M - TOTAL OPERATIONS	\$420,586	\$464,250	\$567,127	\$688,109	\$784,713

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$701,236	\$935,030	\$1,117,752	\$1,246,351	\$1,422,544
M - TOTAL OPERATIONS	\$420,586	\$464,250	\$567,127	\$688,109	\$784,713
J+ M =N TOTAL EXPENDITURES	\$1,121,822	\$1,399,280	\$1,684,879	\$1,934,460	\$2,207,257
Z - TOTAL REVENUE	\$1,177,947	\$1,501,102	\$1,817,601	\$2,122,512	\$2,461,336
Z - N = SURPLUS / (DEFICIT)	\$56,125	\$101,822	\$132,722	\$188,052	\$254,079

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.

Keeping FernLeaf significantly smaller than other area schools was a primary consideration when determining student enrollment. It was concluded that 2 classes per grade level would provide the best balance between student diversity for positive social development and sufficient financial resources for successful operation. Efforts were made to keep class sizes in K-2 as small as possible to support student learning and promote a nurturing environment. FernLeaf's location contributed to our projection planning in that it is convenient to large and growing student populations in northern Henderson County, Hendersonville, and Southern Buncombe County. It is projected that approximately 70% of students will come from Henderson County and 30% from Buncombe County. Since county funding amounts are similar, a shift in the 70%/30% distribution will not significantly impact FernLeaf's operation.

In keeping with the LEA demographics, we estimate that 13% of FernLeaf students will be Exceptional Children students for the purposes of revenue projections, student numbers, and EC teacher staffing needs. The EC student populations in these two counties are 12% in Henderson County, as cited in Henderson County Fast Facts 2013, and 13.8% in Buncombe County, as cited in 2012 Buncombe County School Profile.

Analysis of a variety of data demonstrated that there is a significant demand to support enrollment in excess of FernLeaf's projections. Data utilized included: significant wait-list data from area charter schools; substantial positive survey responses; detailed positive responses of parent/student focus groups; high enrollment numbers for existing public schools in the immediate vicinity; census data showing a sizable and stable number of students; large number of requests to join mailing list; immediate and positive social media engagement; and heavy website traffic (see appendix A data analysis). Additionally, the entire FernLeaf Board of Directors and all committee members live in and are active members in the local community and are confident that full enrollment will be achieved each year.

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The break even numbers presented here are the number of students that must be enrolled in order to break even WITHOUT ANY OTHER CHANGES TO THE BUDGET. The calculation used was budgeted expenses minus contingency funds divided by the average funding per pupil (\$6,692/student, weighted for 70% Henderson and 30% Buncombe) and is:

Year 1	151	students	86% of total enrollment projection (176)
Year 2	188	students	84% of total enrollment projection (224)
Year 3	227	students	83% of total enrollment projection (272)
Year 4	259	students	81% of total enrollment projection (320)
Year 5	296	students	80% of total enrollment projection (368)

To be clear, these break even numbers represent the break even enrollment WITHOUT ANY REDUCTIONS OR OTHER CHANGES TO THE BUDGET EXPENSES. A detailed contingency plan is outlined in the next question.

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

The 1st year budget could withstand a revenue shortfall of 30% (-\$349,761) if the following contingencies were utilized:

*1st year Enrollment Contingency Fund is 10%. Amounts in this contingency for years 1-5 are \$109,353; \$139,176; \$168,999; \$198,823; \$228,646.

*Reduce budgeted reserves. Annual net projections for years 1-5 are: \$56,125 \$101,821; \$132,722; \$188,052; \$254,079.

*Reduce transportation by \$15,000 in yrs 1&2 and \$30,000 in yrs 3-5 by delaying bus purchases.

*Delay hiring one teacher (salary and benefit) for a \$50,222 reduction if enrollment is lower than budget by 10% or more.

*Delay participation in state retirement plan for 1 year (or more) to save \$76,825.

*Delay hiring administrative assistant (salary and benefit) for a \$42,236 reduction.

If revenue is lower than 70% of projections, then teacher, facility, food program, technology, and materials expenses would be significantly reduced to account for the lower enrollment.

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

FernLeaf's budget relies only on state, county, and federal EC funds. No other funding sources were considered in this budget.

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

15:1 average across all grades

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.*

FernLeaf will contract for the following services:

*Instructional support services for students who require special services

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beyond what FernLeaf is able to provide (budgeted years 1-5: \$11,880; \$17,640; \$24,480; \$32,400; \$41,400).

*Custodial services amount is included in the total for facilities operating costs.

Plans at this time are for bookkeeping to be one of the primary responsibilities of the office administrative assistant. Budgeted amounts for the software training and support are included in a separate line item in the non-instructional operations expenses.

FernLeaf will follow all applicable laws and regulations, best purchasing practices for goods and services, as well as the clearly defined Conflict of Interest Policy contained in Article 10 of the bylaws. The Board of Directors may delegate the authority to purchase goods or services and determine the procedure for purchasing goods or services to the School Director or other individual who may have primary responsibility for various aspects of FernLeaf's operation. The procedures for selecting vendors for ongoing services or large purchases are as follows:

- 1) Determine the specific need or qualities desired for the purchase while considering the mission of the school as part of the criteria.
- 2) Obtain bids from contractors that indicate the ability to meet the needs of the school (3 bids are preferred but not required if there are not three vendors who indicate the ability to meet the needs of the school).
- 3) Analyze bids and select vendor based on ability to best meet the needs of the school, ability to adhere to the school's mission, and provide the best value.

Contracts that will cause a change in a budgeted line item of more than 20% and are a minimum of \$5,000 will be brought to the attention of the Board of Directors by the School Director at the next regularly scheduled Board meeting. Board approval will be required for any purchases or contracts totaling more than \$25,000. The board must also approve any total budget expense amendments.

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

Staff Salaries and Benefits:

Mission fulfillment begins with a staff that embraces the vision and underlying values. Success hinges on successful implementation of the instructional program. We offer a salary/benefit package comparable to that of the surrounding LEAs, and a place where teachers can be creative leaders in their classroom and school. Budgeted teacher salaries are the same as the NC state salary schedule for teachers with bachelors degrees and 5-9 years of experience, which is consistent with the level of experience we hope to attract. We offer identical benefits as the LEA and budgeted expenses for these two benefits are based on current state budget amounts of \$5,378/employee for State Employees Health Plan and 15.21% of gross salary for the State Retirement Plan. Staff expenses also include Medicare Tax of 1.45% and Social Security of 6.2% gross salary for all employees. The largest component of the budget is instructional staff (average 51% of

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annual budget) because we must attract dedicated, creative, and collaborative teachers.

Support staff is kept to a minimum and salaries are also based on State Salary guidelines. Support and administrative staff expenses have been kept to a minimum (average of 13.6% of expenses) during the first five years of operation in order to devote more resources to the classroom.

Non-Instructional Operations Expenses:

The next largest expense is for facilities lease/mortgage and operating costs. We realize that committing a large portion of expenses to facilities in the early years would create a financial strain and so budgeted for facility expenses to be a max of 14% of total expenses. Training provided by the Center for Community Self Help provided guidelines suggesting that charter schools who spend more than 15% of their expenses on facilities in the early years are more likely to experience financial difficulties later. The facility plan budget is based on pricing of properties provided by our Realtor of \$8.47/SF and space requirements were calculated at 75 SF/student (recommended by Self Help). The annual budgeted amount is based on these two numbers to provide a reasonable facilities estimate. Facilities operating costs are estimated at \$3.01/SF and include utilities, maintenance, and cleaning costs. Until a specific property is identified, this budget provides a base amount that will be used to plan the structure and terms of facility financing.

Classroom furniture will be tables and chairs which can be moved easily to provide flexible use of space. Each class will have storage areas and teacher equipment such as file cabinets, teacher chairs, tables, and whiteboard. A detailed furniture plan may be found in Appendix U.

(response continues in the space provided for additional information below the next 3 questions)

- 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 FernLeaf Board of Directors recognize the need to have a minimum of three months budgeted expenses on reserve in case funding is delayed or does not occur as planned in order to keep the school financially sound. Therefore, developing an adequate reserve was a primary focus of the financial plan. It is the first of our two financial goals and will result in the following reserves:

*Year 1 will leave a minimum of 5% of total annual expenditures.

*Year 2 will leave a minimum of 6% of total annual expenditures for a cumulative reserve of 11% of total annual expenditures.

*Year 3 will leave a minimum of 6% of total annual expenditures for a cumulative reserve of 17% of total annual expenditures.

*Year 4 will leave a minimum of 6% of total annual expenditures for a cumulative of 23% of total annual expenditures.

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*Year 5 will leave a minimum of 7% of total annual expenditures for a cumulative of 30% of total annual expenditures

The importance of an adequate reserve fund is acknowledged in our board policy to require board approval to draw on the reserves only when necessary to remain financially sound. The budget calls for the general fund reserve cumulative balance to meet these goals the first three years and to exceed the goal and grow to over \$730,000 by the end of the fifth year.

Goals will be met only by careful and frugal management of resources as demonstrated in the budget plan. Keeping costs down during the first few years of operation will allow the establishment of a firm financial foundation for future years. We must begin with focused implementation of our thorough marketing plan so that the enrollment goal of 100% is met (see marketing plan section and appendix U). Although it is not required for financial success, we hope to increase our revenue by taking advantage of any grant opportunities or other assistance programs. The FernLeaf parent organization and advisory committee will work with the Board of Directors to plan and assist with school fundraising. We will develop partnerships with local businesses and individuals to work with FernLeaf in achieving the school mission by providing venues and materials for experiential learning activities to minimize material costs.

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

FernLeaf plans to lease facilities initially until it has established the financial stability to purchase property upon which to build or renovate to meet long term needs. We anticipate that this may be possible during the fourth year of operation, and financing options for property purchase will be reviewed at that time. In order to obtain an initial leased facility, we will seek property that can be easily renovated to meet our needs and for which the owner will negotiate favorable lease terms. We will seek grants and loans from sources known to work with charter schools and explore options for financing from other public or private sources once preliminary approval is received by the State Board of Education. Preliminary discussions with Charter School Capital, American Charter Development, Funding the Gap, and the local USDA Rural Development office have been initiated in the exploration of financing options for facilities. After the school facility has been identified we will determine a specific financing structure consistent with the disbursement of state and local funds and our budget projections.

In order to purchase necessary goods and services needed prior to opening and prior to the receipt of state and local funding, we will establish loan(s) or credit lines for the purchase of supplies and equipment that can not be delayed. Preliminary discussions surrounding working capital have been initiated with Charter School Capital, American Charter Development, and Funding the Gap. We will forgo the purchase of any items or services not deemed essential at start up until funds become available. The Board will also seek to establish accounts with companies that will delay invoicing and leasing until after funding has been received from state and local sources. Additionally, board members are prepared to donate necessary resources and offer services to raise funds that will ensure FernLeaf's successful start up.

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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

FernLeaf does not presently have any assets from other sources.

(Below response continued from the budget alignment question)

The transportation plan includes one bus the first year of operation and a second in year three. In addition to transporting students to and from school, the bus will be used to transport students to offsite experiential learning venues. Transportation accounts for 8-10% of annual expenses and includes debt service, fuel, bus driver pay, and maintenance.

The budget line for Professional contracted services includes an attorney, and assumes 20 billable hours/year (recommended by the Law Office of Jeff Ward) with a price increase of 3% each year. We have contacted two auditing firms but have not decided which will complete the annual audit and IRS Form 990. The amount budgeted is based on the two quotes with a 3% annual increase.

The total budgeted amount for ISIS, the state required financial software, is \$7K. Licensing for ISIS is currently paid by the state, but the vendor, Educational Management Systems, Inc., requires charter schools to pay \$3,200/year for support. Also included in this budget line are three days onsite training at \$1,200/day and \$200 for initial training for the board treasurer at their location.

The communications plan will utilize a VOIP phone system. Each grade level will have one phone and each office staff will have a dedicated phone. Utilizing this type of system saves the school the expense of purchasing an in house system, saves the costs of installation and maintenance, and allows us to be flexible in our configurations and installation time-frames. Phones and technical support were quoted by Mitel at the cost of \$240/year per phone plus \$150 for the purchase of new phones each year.

Non instructional office computers are budgeted at \$1K for each office staff member. This amount includes desktop computer/monitor packages ranging from \$400-\$600 and software packages ranging from \$200-\$400 based upon pricing from BestBuy. One of the two copiers machines recommended by a Toshiba Business Services representative will be capable of serving as an office printer, fax machine, and scanner (cost included in instructional copy costs line item).

Office staff is kept to a minimum and \$800 per office employee was budgeted for general office supplies. This amount is based on a list of general desk supplies and postage with pricing from Staples (Appendix U-8). Furniture in the office is included in the furniture expense line and will be simple and functional at a cost of \$3,375 (Appendix U-5).

1st year marketing costs of \$7K are outlined in detail in the marketing plan

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section of the application and in Appendix U-3. Costs for years 2-5 are \$5K/year as we will be marketing primarily to new kindergarten students and will market through local pre-kindergarten programs, churches, and use other inexpensive marketing strategies to attract new kindergarten students. After year one we will evaluate which marketing strategies have been most effective and eliminate costs for those that were not.

Insurance budget is based on quotes from Insurance People for years 1 and 5 (Appendix P). Amounts for years 2-4 were increased proportionally based on these quotes.

The detailed food plan and budget calculations are in Section 5 of the application. Other charter schools we have consulted suggested that anywhere from 10%-50% of students that qualify for the program based on federal poverty guidelines participate. FernLeaf will be located in an area of the county where the current public schools have some of the lowest percentage of free and reduced lunch in Western NC. Even so, our budgeted amount of \$6,498 is based on the high end 50% participation rate of students that qualify based on poverty guidelines.

The Enrollment Contingency Fund is an important fund for which an amount was intentionally excluded from spendable revenue in anticipation of a 10% enrollment attrition that may occur during the first 20 days of school. The enrollment attrition of 10% was suggested based on the experience of the Center for Community Self Help, who works closely with charter school financing. The per student dollar amount used to calculate the total contingency each year is a weighted average of \$6,213 which is based on the state and local funding amounts for Henderson County(70%) and Buncombe(30%) in order to be consistent with our LEA revenue projections.

Background checks will be completed by Southeastern Background Services, LLC at a cost of about \$20 each. Background checks will be conducted for all employees before they are offered a contract. New board members and all volunteers will also complete checks before they begin working. Approximately 25 background checks/year are expected.

Costs for preparation and filing of Form 1023, Application for Recognition of Exemption Under Section 501(c)(3) of the Internal Revenue Code, include a preparation fee of \$2,150 quoted from a potential service provider, plus an IRS user filing fee of \$850, totaling \$3,000 as a first year only expense.

Instructional Operational Expenses:

The description of FernLeaf's mission found in Section 1 of the application mandates the wise and frugal use of materials and the use of only that which is necessary. Environmental responsibility was one of the foundations upon which FernLeaf was established. Thoughtful use and reuse of materials in the classroom and throughout the school will be a guiding principle. The richness and diversity of our rapidly growing mountain and farm community that is also within reasonable driving distance of several regional cities, provides access to natural and urban resources that are literally "outside our doorstep". FernLeaf will take advantage of our location to design place

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based experiential learning opportunities that take advantage of our location, environment, and history to make learning come alive without high expense or environmental impact. FernLeaf's instructional approach and vision allow instructional operational expenses to be kept at an average of 5.2% of the overall budget.

Inside the classroom, technology and online applications will be available via wireless internet on laptops and Chromebook type devices for teacher and student use. Device hardware will be purchased the first year at a ratio of 1 device for every 3 students. A device to student ratio of 1 for every 2 students will be reached and maintained in years 2 and 3. In years 4 and 5 we will have one device for about every 1.5 students. Free and inexpensive applications and internet resources such as those associated with "Google for Education" will be utilized instead of expensive licensed software to keep expenses at a minimum for software licensing. Technology hardware expenses for the first year also include the hardware to set up wireless internet zoning throughout the school with technical support and a document camera and projector for each grade level. See appendix U-4 for technology cost basis.

The budgeted amount for contracted educational services is based on a rate of \$75/hour with students receiving services once/week. The hourly rate is based on quotes obtained from Presence Learning and Signature Learning Resources, both contractors of instructional services.

Instructional materials and supplies for the classrooms have been itemized and priced by two experienced elementary school teachers who established an amount that totaled ~\$7,000 for year one, with increases each year thereafter. The budget for math and science supplies includes science equipment and consumables, as well as math manipulatives. English Language Arts includes phonics resources, spelling resources, guided reading instruction, writing instruction, and leveled readers. Also included in this line is money for software and subscriptions teachers may want to utilize in their classrooms such as "readingaz.com" to provide printable leveled reading material for Language Arts instruction and "Discovery Streaming Plus" for access to video and other visual instructional resources.

\$6,000 is budgeted for student projects in a separate line based upon \$1,500 per grade level per year. This amount is estimated based on the real classroom experience of teachers who have utilized project learning and provides base supplies and resources. The raising of additional funds and procurement of resources will be integrated into projects as part of the overall learning experience for students.

Copy costs were calculated utilizing information provided by Toshiba Business Services which has a state contract and provides copy services to an area LEA. Toshiba charges \$.015 per black and white copy with no additional costs incurred for machines, maintenance, or copier supplies (with the exception of paper and staples). Paper costs of .0058 per sheet (\$29 per ream of paper bought locally) results in a combined cost of \$.0208 per copy. Based on Toshiba's recommendation and a board member's experience, a typical school runs between 900-1200 copies/student per year. Despite a commitment to use materials wisely, for budgeting purposes we estimate the

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number of copies at the high end of this range. At 1,200 copies/student per year, the budget amount for copies was based on \$24.96/student per year. The annual calculated amount for copies included in Instructional Operations Expenses - Books and Supplies is based on 100% student enrollment.

Other classroom supplies were budgeted at \$750 per grade level totaling \$3,000 the first year with increases each year as grade levels are added. Teachers will be permitted to utilize this allotment to select the specific supplies they require each year.

In addition to EOG tests and other state assessments, FernLeaf testing includes three quarterly Measures of Academic Progress (MAP) tests. A price of \$12/student per year for the 3 test package was quoted by the test vendor NWEA. MAP assessments will be conducted in all grade levels and 100% student enrollment figures were used to calculate these costs. An additional \$1,000 was added to this amount each year to allow for any additional testing required or needed by students.

Initial staff development will be training on experiential learning strategies and project based instruction. An amount of \$3,000 has been set aside for training in the form of book studies that are directly relevant to our mission and education plan. Examples of current books on these subjects include "Transformational Literacy: Making the Common Core Shift with Work That Matters" which offers detailed directions for project based experiential learning, and "Connecting Service Learning to the Curriculum: A Workbook for Teachers and Administrators" which provides a model for service and place based learning published by Community Works Institute. Specific texts will be determined by the administrative staff closer to school start-up so that the most current information is used for this training. After the first year the school improvement team will be responsible for recommending the subject matter and delivery method for professional development. Book studies, inservice workshops, online trainings provided by DPI through NCEES, and free webinars will be utilized to provide teachers with meaningful professional development. The second year budget includes \$200 for each staff member to attend workshops or online webinars that meet their individual needs. Consistent with their leadership role, teachers will be asked to convey the ideas and concepts learned to the rest of the staff during the scheduled time allowed in the school calendar for professional development. Professional development also includes \$1,000/year for board development training as discussed in Section 4.

The revenue surplus will be placed in a general fund balance as outlined in the response to the question regarding the development of the general fund balance.

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

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

The Board of Directors is responsible for adopting policies to ensure there are adequate internal controls and then to provide oversight to know that the policies are followed consistently and completely. Due to the small number of administrative personnel during FernLeaf's first years, the board of directors will play an active role in making sure that duties involving cash, disbursements, and invoice verification are segregated appropriately. As the school administrative staff grows, the board will turn some of the financial processing duties over to school staff, but will always maintain close oversight of the school's financials.

The board will receive a monthly financial report that will consist of:

- *Income statement (revenue and expenses) with budget comparison.
- *Cash Flow projection worksheet.
- *Balance Sheet showing financial position at the previous month end.
- *Asset status report listing asset acquisitions, disposals, and needed repairs/maintenance.
- *Enrollment report.
- *Fundraising status report.
- *Outstanding check report.
- *General ledger summary report with detail available.

Additionally, the board will review actual bank statements and compare them with the bank balance on the School Director's cash flow report. The Board will monitor the correct handling of outstanding checks and checks that should be voided. The Board will also review monthly general ledger journal entries for correct disbursement and legitimate depreciation entries.

Segregation of duties in a small school will require strict adherence to board financial policies. This will be accomplished by using a voucher package system (approved purchase requisition, purchase order, vendor invoice, accounts charged, etc.) for all disbursements. Policies will mandate that expenditure approval is conducted by a different individual than the person that signs the check for the expenditure. Payroll checks will be signed by the board chairperson or treasurer. Pre-numbered cash receipt books will be used by any employee authorized to accept cash or checks (teachers, office administrative assistant, etc.) and cash/checks will be receipted upon acceptance and prepared for deposit the same day. Mail will be opened by someone other than the employee responsible for making bank deposits and all checks received in the mail will be recorded in a pre-numbered receipt book. Reconciliation of the bank statement(s) will be completed by an individual other than the employee who requests disbursements or makes bank deposits. All reports generated by the bookkeeper will be reviewed for accuracy by the School Director and/or board treasurer. Other procedures to keep financial responsibilities segregated to avoid fraud or embezzlement will be developed. During the first year when there is no Assistant School Director, the Board Treasurer and/or Chairperson will sign checks and thoroughly review ledger entries in order to facilitate segregation of duties.

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All assets will be recorded and tracked in asset management software. Assets will be inventoried at the end of each school year and midyear. Items valued over \$5,000 will be reviewed periodically during the year for needed repairs or maintenance. The school director will keep a list of needed major repairs and updates and present that to the board as part of the monthly asset status report.

All audit and IRS form 990s will be kept indefinitely and financial records will be retained for at least seven years. These and other important corporate records will be retained at the school in a fireproof file cabinet and also scanned and stored on digital media to be stored at a secure location other than the school.

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

At the present time there are no known or possible related party transactions for FernLeaf.

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.

FernLeaf has contacted two firms familiar with charter school operations and participated in training about the audit procedure, costs, and timetable. We will make a final decision after preliminary approval is received. The firms we have been in contact with are:

Elliott Davis, PLLC
Tom McNeish, CPA
5410 Trinity Road
Raleigh, NC 27607
Phone 919-734-6180
Fax 919-783-7138

and

LB&A CPAs
Courtney LaLone, CPA
212 W. Matthews Street Suite 102
Matthews, NC 28105
(p)704-841-1120 (f)704-841-4901

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
As stated before, there are concerns that the enrollment will not be met as a newer charter school in the general area has had difficulty meeting their enrollment as well.	Brian Smith	Total Budget
Other funds/working capital are NA.	Kathryn Mullen Upton	Total Budget
<p>This section of the budget seems to be incomplete, specifically, the benefits section. What is the basis, overall, for the assumptions on year/year increases? why are these the only positions? where are the others that were listed in the personnel section?</p> <p>why does the school director's salary rise so much more quickly than other salaries? why is the substitute teacher an admin position? what is the basis for this salary? why is this figured as a staff position instead of as a lump sum in the instructional budget? what rationale supports this pay scale as competitive for the area? why are all FTEs not fully covered by all items in the benefits section?</p> <p>VERIFY: i suspect that if you appropriately budget for retirement, SS, medicare, etc, this will have a significant budget impact.</p>	Kristen Vandawalker	Personnel Bu
Budget numbers appear really low.	Kathryn Mullen Upton	Personnel Bu
<p>Legal looks low, as does the books and supplies line. Question for interview: please provide the rationale for these projections.</p> <p>Facilities also appears low.</p>	Kathryn Mullen Upton	Operations B
Instructional Contracted services should be reviewed. Does this projection include the cost of school psychologist, occupational therapists, physical therapists or speech/language therapists?	Carol Ann Hudgens	Operations B
Is the total calculated for the total allocations for laptops bundles in years 2 and 3 in appendix U correct?	Brian Smith	Operations B
<p>Overall this budget does not appear to make much sense. the increases and decreases make little sense, and the line items appear to be lumped together to a much greater degree than other applications, which makes it much more difficult to assess.</p> <p>what is the basis for the rent/mortgage line and how were the increases calculated? are renovations included here?</p> <p>what are the "operating and fixed costs?" is this utilities, maintenance, etc? what is a fixed cost for a building?</p> <p>What is included in the furniture line in year one?</p> <p>what is the basis for the audit fee and subsequent increases?</p> <p>what is included in the legal fees line?</p> <p>what is the financial software? who will be handling business functions for the school? there is no staff role nor a contracted service line for this?</p> <p>What services will be contracted? will sped be contracted?</p> <p>all office expenditure lines are wholly inadequate, in fact the computer/software and office supply lines are laughably low.</p> <p>what is the 3k 501 fee? it only costs \$850 or so to file for 501 status, which the applicant should have done previously.</p> <p>what is the "enrollment contingency fund?"</p> <p>what is the basis for the classroom technology line? what is purchased in year 1, why are years 2 and 3 so low?</p> <p>what is "contracted educational services?" is this sped? wat is included in this line?</p> <p>the books and supplies lines are all ridiculously low, and the year over year increases make little sense. What is included in "testing supplies?"</p> <p>what is the basis for the low PD figures and why do they stay low over the course of the charter?</p>	Kristen Vandawalker	Operations B
<p>Why are you choosing to purchase from Bestbuy on software bundles and desktops for the non-instructional office staff instead of buying in bulk with the instructional purchases could get you discounts when making purchases?</p> <p>In the technology portion, what provider will be providing the network and bandwidth for these large amounts of data streaming? What infrastructure will be in place? Are</p>	Brian Smith	Budget Narra

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funds allocated for these services that are not in Appendix U? How will this have an effect on teacher planning?		
It's unclear whether it is possible to delay payment to the state retirement system.	Kathryn Mullen Upton	Budget Narra
<p>what will backfilling above grade 2 do to school culture?</p> <p>what is the contingency fund?</p> <p>no "reserve" line item exists. The annual surplus will automatically reduce, this is not a contingency plan.</p> <p>how will a teacher be released, given the small school size, if the students missing are not all at one grade level? how will you decide what teacher to fire once the school year has started?</p> <p>will not offering retirement further reduce the school's ability to compete? can this decision be made after payroll has been initiated?</p> <p>who will cover admin functions if an admin is not hired? what about business functions?</p> <p>how would "teacher, facility, food program, technology, and materials expenses would be significantly reduced?" How can these changes be made during the school year?</p> <p>how do you arrive at 15:1 ratio?</p> <p>what is included in "custodial services" and what will it cost?</p> <p>if bookkeeping will be done by the admin, who will do it if this position is cut? what is the basis for thinking that one person can handle bookkeeping, clerical, office management, student tracking, etc?</p> <p>the explanation of staff benefits here makes it clear that there are significant errors in the budget as noted earlier.</p> <p>this response appears to indicate that the facility rent/lease amounts are fabricated based on guidance, without any factual basis?</p> <p>What, specifically, will the Board pony up: "Additionally, board members are prepared to donate necessary resources and offer services to raise funds that will ensure FernLeaf's successful start up"?</p> <p>What conversations have taken place with the named financing firms? why are more details not included here?</p> <p>what types of companies "defer leasing and invoicing" as indicated here?</p> <p>Why am i just now hearing that environmentalism is a core component of the founding of the school?</p>	Kristen Vandawalker	Budget Narra
<p>what is the basis for providing this level of detail to the board on a monthly basis?</p> <p>This section seems to imply that the board will be handling a significant amount of the financial and business functions of the school on an operational basis, which far overreaches the role of governance/oversight a board is meant to provide.</p> <p>there is little reason to believe that an admin staff of one or two people can appropriately segregate duties.</p>	Kristen Vandawalker	Financial Au
Independent audit procedures were not described, but a thorough description of internal controls was included.	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	
Brian Smith	Fail
Alan Hawkes	
Steven Walker	

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Phyllis Gibbs	
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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).

fernleaf Date: 09/25/2014

Applicant Signature:

The foregoing application is submitted on behalf of FernLeaf Community Charter 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: fernleaf

Board Position: Chairperson

Signature: _____

Date: 09/25/2014

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public Official Seal

My commission expires: _____, 20____.

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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.

<u>Total Initial Screening Votes</u>	
No	Yes
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.

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

<u>CSAB Votes</u>	
No	Yes
	10 JM, SW, CT, BT, PG, HN, AQ, AH, SR, ES

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

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

External Evaluator	
Mission, Purposes, and Goals	<p><u>Mission Statement</u></p> <p>- kvandawalker</p> <p><u>Educational Need and Targeted Student Population</u> What is the basis for the asserting the the surrounding schools are "overcrowded?" How does this small school address the issue of the alleged overcrowding? Will it pull sufficient students from any one school to bring the enrollment down to a more manageable level? While the applicant has conducted significant research of the target area, the target population of students is not clear, nor is it apparent that there is an educational need for the school. - kvandawalker</p> <p><u>Educational Need and Targeted Student Population</u> How many teachers are you planning to hire? Is there a list of students that are ready to come to your school? - brian_smith2</p> <p><u>Purposes of Proposed Charter School</u> While the applicant describes a school that meets legislative objectives, the connection to improved student achievement is not clear. - kvandawalker</p> <p><u>Purposes of Proposed Charter School</u> How will Fernleaf provide teachers the powerful voice in the development of the school's goals, direction,and policies? - brian_smith2</p> <p><u>Goals for the Proposed Charter School</u> Growth targets were not included; these would strengthen the growth goals, making the measurable and provide a defined target for improving student outcomes. - kmullenupton</p> <p><u>Goals for the Proposed Charter School</u></p>

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	<p>Goals are not addressed in SMART terms.</p> <p>Operational goals seem to be just executing the planned model, which does not rise to the level of a goal?</p> <p>Academic goals lack rigor and specificity. Why is a flat goal of 80% of students appropriate? What is "growth?" Should ALL students grow BOY to EOY AND year over year?</p> <p>It is unclear how the board will assess the school's progress. Monitoring and assessing are not the same thing. - kvandawalker</p>
<p>Education Plan</p>	<p><u>Instructional Program</u></p> <p>it is unclear how the long list of programs and methodologies listed here will come together to form a cohesive whole.</p> <p>No curricula are specified. Will the applicant develop original curricula? if so, when, and who will lead and execute this work?</p> <p>How do the many assessments listed here fit together, and how do they impact the overall academic calendar?</p> <p>Because the actual target student population is unclear, the effectiveness of the many program elements listed cannot be evaluated. Additionally, it is unclear whether these elements have been used before to drive student growth. - kvandawalker</p> <p><u>Instructional Program</u></p> <p>Where is the assessment rubric that supports the project-based instruction? How is the rubric going to be assessed as a valid assessment that learning is taking place and is aligned to the Common Core and NC Essential Standards? How is student growth going to be collected and used on these project-based assignments? - brian_smith2</p> <p><u>Instructional Program</u></p> <p>The narrative did not include evidence that the proposed approach will lead to improved student performance for the target population.</p> <p>Very little specific detail is included regarding curriculum and attendant materials. - kmullenupton</p> <p><u>Curriculum and Instructional Design</u></p> <p>The applicant places great stock in the small overall school size, but does not address the difference in class sizes between the local schools and Fernleaf.</p> <p>It is unclear how the curricula (unspecified), EL/PBL models, and vast selection of assessments will work together to provide opportunities for data-driven differentiation.</p> <p>A laundry list of instructional methodologies is presented, it is unclear how teachers will be supported in implementing all of these and possibly creating their own curricula.</p> <p>Again, without a solid picture of what the student body will look like, it is impossible to evaluate the potential for success of the listed methods.</p> <p>The academic calendar indicates only 8 work/PD days before the start of the year. Is this sufficient time, especially for the founding staff, to create culture, prepare a school building and individual classrooms, and provide sufficient development on all topics/methods listed here?</p> <p>What is the purpose of the two weeks of teacher workdays at the end of school?</p> <p>What are there only four full work days? are these PD days? Are the early dismissals PD days as well?</p> <p>Who oversees enrichment on early dismissal days and during intersession? What is the logic for having early dismissal on Mondays? - kvandawalker</p> <p><u>Curriculum and Instructional Design</u></p>

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	<p>In Appendix B, a sample is given for Math grade k-5 and Science for middle school. There is not a sample explanation for Language arts. How are you going to address reading as this is a state wide problem?</p> <p>In appendix C, the calendar has only 171 days in the school year not the required 185. How are you going to make sure the 1025 hrs or 185 requirement is met? How will the 33 early release days impact the parents? - brian_smith2</p> <p><u>Curriculum and Instructional Design</u></p> <p>Beyond the math sample curriculum outline, there is little detail included regarding the full range of programs and services for students in all grades.</p> <p>The calendar does not appear to have sufficient number of instructional days.</p> <p>Appendix B is difficult to follow. - kmullenupton</p> <p><u>Special Programs and "At-Risk" Students</u></p> <p>When are the PLPs developed, and how is this work undertaken? What are the inputs? what is the content of the PLP?</p> <p>What is an "emergency situation" that would require expedition of the process?</p> <p>What learning environments allow students to progress at their own pace? How does this track with the focus on community and supportive culture?</p> <p>What interim assessments support assessment of progress? - kvandawalker</p> <p><u>Special Programs and "At-Risk" Students</u></p> <p>It is unclear whether the programming for ELL students entirely teacher-created.</p> <p>Whether the school will utilize any off-the-shelf programs is also unclear. - kmullenupton</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>How do the PLPs interact with the 504 or IEP plans of individual students? Is one subject to another?</p> <p>This section demonstrates some, but not thorough, understanding of public school obligations with regard to students with special needs. - kvandawalker</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>Will the registration process be before or after the initial lottery? - brian_smith2</p> <p><u>Exceptional Children – Identification and Records</u></p> <p>How does the four weeks of intervention factor into the 90-day process for initial evaluation? What happens if parents request an evaluation?</p> <p>Reviewer recommends that the applicant review the Child Find procedures in the Policies Governing Students With Disabilities. - carolann_hudgens</p> <p><u>Exceptional Children – Education Programming</u></p> <p>Please clarify what is meant by "When necessary alternate educational settings such as small group, one to one, independent study, blended, and other learning environments will be used." How does this description fall into the continuum of alternative settings as describes in the NC Policies? How is independent study direct instruction? EC Staff description include services as consultants or mentors. How does this fit the definition of specially designed instruction? Unable to determine the applicant's plan for providing related services and support. - carolann_hudgens</p> <p><u>Exceptional Children – Education Programming</u></p>
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	<p>The plan is very broad, and it is unclear what the actual services would look like when implemented within the school. - kmullenupton</p> <p><u>Student Performance Standards</u> Responses are not presented in SMART terms. Portfolios and projects are minimally explained and it is unclear how these elements will be evaluated, and how these align with other required promotion requirements. This section is underdeveloped, and does not clearly present promotion criteria in a clear and succinct manner that allows for understanding of what specific benchmarks must be met for grade to grade promotion and graduation. Board members are mentioned, conflating the relationship between governance and management. - kvandawalker</p> <p><u>Student Performance Standards</u> How will performance goal 4 be assessed? Is there a rubric that will be used by all evaluators? Board members cannot evaluate student works as it is a conflict of interest. How will you address this? - brian_smith2</p> <p><u>Student Performance Standards</u> Proficiency must be demonstrated on a variety of assessments (to be developed, currently undefined), in order for a student to be promoted. Question for interview: please describe in greater detail what the founding group believes the standard for promotion (and retention) should be. Growth is not defined. - kmullenupton</p> <p><u>Student Conduct and Discipline</u> this section is minimally developed and does not address lower level infractions, nor is there any mention made of supports for positive behavior. The SEL component is not fleshed out, nor is the overall culture of the school and approach to discipline clear. Are only students over 14 able to be expelled? Who is the head of discipline for the school? The process for the collaborative development of the handbook is unclear, and the narrative does not address the questions fully. - kvandawalker</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Appendix E is included, and indicates that the applicant has yet to obtain tax exempt status. Question for interview: is status pending? - kmullenupton</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Why the large span in acceptable size? is this permissible under NC law? Why will staff be hired before the school director? Why evaluate the principal before the end of the school year? Why is the parent advisory committee led by/organized by the principal? The organizational chart is confusing. Does the school director oversee every staff member directly? What are the powers of the SIT, SAC, CAC, and FLPO? What are the purposes of these committees? Why is the school director charged with overseeing all of these? Why so many committees for a school in startup mode with only six board members? Is this the second application from this group? If so, why have they not filed for 501c3 status yet? Why did the group decide not to start a private school? What is the source of the board policies document?</p>

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	<p>Is a quorum of 1/3 directors acceptable under NC Law? is this good practice? this means that currently two people can act on behalf of the board and that no informal discussions may take place?</p> <p>Who is the instructional and discipline head of the school?</p> <p>It is unclear if the bylaws are in line with OML requirements.</p> <p>Why is James Elliot included? Meeting minutes indicate that he has resigned?</p> <p>- kvandawalker</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p> <p>The organization chart is blank.</p> <p>There were a number of blank pages in Appendix G, although it appeared that the information for the board members listed in the narrative was included.</p> <p>There was not a description of the board committees in the narrative, save for a mention of an Executive Committee. Question for interview: what are the other committees, and what are their roles/responsibilities?</p> <p>Bylaws are proposed, not actual.</p> <p>Bylaws do not include information on committees.</p> <p>There is little detail on board evaluation.</p> <p>- kmullenupton</p> <p><u>Proposed Management Organization (EMO/CMO)</u></p> <p>NA - kmullenupton</p> <p><u>Projected Staff</u></p> <p>What is an "integrated curriculum teacher?"</p> <p>Why are additional EC and TA positions not added in out years?</p> <p>Who handles finance and operations? - kvandawalker</p> <p><u>Projected Staff</u></p> <p>Starting salary of \$33,000 may be low. - kmullenupton</p> <p><u>Staffing Plans, Hiring, and Management</u></p> <p>The job descriptions are vague.</p> <p>Academic, discipline, and business/financial leadership responsibilities are not specified.</p> <p>The hiring plans are not concrete and actionable.</p> <p>- kvandawalker</p> <p><u>Staffing Plans, Hiring, and Management</u></p> <p>Low salaries may impact recruiting/retention of high performing staffers. - kmullenupton</p> <p><u>Staff Evaluation and Professional Development</u></p> <p>VERIFY: It looked like the assistant director had licensure in job descriptions on previous sections.</p> <p>No actionable plans for ongoing PD are included.</p> <p>PBL and EL are not included in the PD description.</p> <p>is five days sufficient PD given the proposed program and instructional methodology as well as openness to new teachers?</p> <p>- kvandawalker</p> <p><u>Staff Evaluation and Professional Development</u></p>
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	<p>Professional development plans are very broad; more detail is needed to understand what, specifically, will comprise PD. - kmullenupton</p> <p><u>Marketing Plan</u> The marketing budget seems low based on national best practices, and print materials seem wholly insufficient to meet the needs of the event/presentation schedule laid out. What is the basis for the selected advertisements? Is there evidence that newspaper/billboard ads work? WHat is the 1.2k social media campaign? - kvandawalker</p> <p><u>Parent and Community Involvement</u> The communications plan is not actionable or time-bound. There is little evidence that even preliminary groundwork has been laid for key relationships. Is social media/website sufficient as a primary means of outreach if the goal is to develop a diverse student body? The parent involvement/engagement section is vague. There is little evidence that the applicants have specific strategies for volunteers. At first blush, this section on the whole comes off condescending to the parent and community members. - kvandawalker</p> <p><u>Parent and Community Involvement</u> The plan is very general and relies heavily on parents coming to various events. There is no proactive outreach or focused strategy for individual families. - kmullenupton</p> <p><u>Admissions Policy</u> Is this sufficient time for a robust application recruitment process that will ensure a diverse student body? This section is generally sufficient, but lacks finesse. - kvandawalker</p> <p><u>Admissions Policy</u> It appears two separate lotteries will be held; it is unclear whether this is permissible. - kmullenupton</p> <p><u>Projected Student Enrollment (Table)</u> why is there a presumption that students can be backfilled in upper grades, even at a rate of four or five per grade level? Is there a presumption that there will be no attrition? what is the rationale for the assumption that, especially in year 1, it will be easiest to recruit students in the highest grades served, especially in grade 3? - kvandawalker</p> <p><u>Projected Student Enrollment (Table)</u> There is a concern that the projected enrollment is not going to be met. How will Fernleaf be able to secure the projected number of students? How will you initially secure testing students in third grade? How will Fernleaf insure that there are zero student turnover in the projected years to follow? - brian_smith2</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Question: are incentives to families permitted? - kmullenupton</p> <p><u>Transportation Plan</u> How will you make the projected school enrollment if transportation prevents students from getting to the school? - brian_smith2</p>

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Transportation Plan

What is the transportation plan for students with disabilities that have special transportation as a related service in their IEP? - carolann_hudgens

Transportation Plan

What is the basis for the cost of a used bus at 15k? Who will drive the bus (no bus driver in staff list? or is this number inclusive of a lease, driver pay and fuel/maintenance???)

who is responsible for coordinating the carpools in advance of the first day of school and developing the parent connections that will be required?

have the named apps been used successfully by other charter schools?

does the dependence on carpooling create a barrier to entry for lower income families?

how do walking school busses and bicycle trains carry signage? do these methods unfairly favor higher-income families?

what is the purpose of the incentive program? does this create a culture of haves/have nots? it seems to afford a bonus to those who happen to be lucky enough to live near the school?

- kvandawalker

School Lunch Plan

Of the identified students (19) will they be eligible to ride the bus on the first day of school?

There is a concern that the expense of supplying meals until the students qualify for the National School Lunch Program may cost the school more money than anticipated. How will that impact your beginning budget? - brian_smith2

School Lunch Plan

why will the students eat in classrooms?

why will a microwave be provided? this seems unrealistic for small children with a short lunch period.

what is the basis for assuming that a staff member will prepare the lunches?

what is the basis for needing to "discretely" distribute them? why is there a presumption of stigma attached to FRL? what is this based on?

what "other schools" have suggested that not all eligible families will avail themselves of the FRL? - kvandawalker

Civil Liability and Insurance

Appendix P didn't include the name of the insurance company that provided the quote.

Question for interview: which company provided the quote? - kmullenupton

Facility and Facility Contingency Plan

Contingency plan does not name potential sites. Question for interview: what are the possible contingency sites? - kmullenupton

Facility and Facility Contingency Plan

How will location impact student enrollment? - brian_smith2

Facility and Facility Contingency Plan

This section is underdeveloped and lacks the specificity required to demonstrate that the applicant has a clear understanding of the time-sensitive nature of this work.

If the board has been working with a real estate agent for over a year, why are no specific facilities identified? who is the "facilities advisor" and what is this person's role?

What technical support would the DPI provide?

What is the rationale that supports this timeline. Unless a turnkey or nearly complete school building is identified, on what basis does the applicant believe that the school can

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	<p>be prepared for students in six months? If the facility is not prepared until January, ow will this affect the marketing and recruitment programs? - kvandawalker</p>
<p>Financial Plan</p>	<p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> As stated before, there are concerns that the enrollment will not be met as a newer charter school in the general area has had difficulty meeting their enrollment as well. - brian_smith2</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> Other funds/working capital are NA. - kmullenupton</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> This section of the budget seems to be incomplete, specifically, the benefits section. What is the basis, overall, for the assumptions on year/year increases? why are these the only positions? where are the others that were listed in the personnel section? why does the school director's salary rise so much more quickly than other salaries? why is the substitute teacher an admin position? what is the basis for this salary? why is this figured as a staff position instead of as a lump sum in the instructional budget? what rationale supports this pay scale as competitive for the area? why are all FTEs not fully covered by all items in the benefits section? VERIFY: i suspect that if you appropriately budget for retirement, SS, medicare, etc, this will have a significant budget impact. - kvandawalker</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> Budget numbers appear really low. - kmullenupton</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Is the total calculated for the total allocations for laptops bundles in years 2 and 3 in appendix U correct? - brian_smith2</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Instructional Contracted services should be reviewed. Does this projection include the cost of school psychologist, occupational therapists, physical therapists or speech/language therapists? - carolann_hudgens</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Overall this budget does not appear to make much sense. the increases and decreases make little sense, and the line items appear to be lumped together to a much greater degree than other applications, which makes it much more difficult to assess. what is the basis for the rent/mortgage line and how were the increases calculated? are renovations included here? what are the "operating and fixed costs?" is this utilities, maintenance, etc? what is a fixed cost for a building? What is included in the furniture line in year one? what is the basis for the audit fee and subsequent increases? what is included in the legal fees line? what is the financial software? who will be handling business functions for the school? there is no staff role nor a contracted service line for this? What services will be contracted? will sped be contracted? all office expenditure lines are wholly inadequate, in fact the computer/software and office supply lines are laughably low. what is the 3k 501 fee? it only costs \$850 or so to file for 501 status, which the applicant</p>

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should have done previously.
what is the "enrollment contingency fund?"
what is the basis for the classroom technology line? what is purchased in year 1, why are years 2 and 3 so low?
what is "contracted educational services?" is this sped? wat is included in this line?
the books and supplies lines are all ridiculously low, and the year over year increases make little sense. What is included in "testing supplies?"
what is the basis for the low PD figures and why do they stay low over the course of the charter?
- kvandawalker

Operations Budget: Expenditures 2017-2021 (Table)

Legal looks low, as does the books and supplies line. Question for interview: please provide the rationale for these projections.

Facilities also appears low. - kmullenupton

Budget Narrative

Why are you choosing to purchase from Bestbuy on software bundles and desktops for the non-instructional office staff instead of buying in bulk with the instructional purchases could get you discounts when making purchases?
In the technology portion, what provider will be providing the network and bandwidth for these large amounts of data streaming? What infrastructure will be in place? Are funds allocated for these services that are not in Appendix U? How will this have an effect on teacher planning? - brian_smith2

Budget Narrative

what will backfilling above grade 2 do to school culture?
what is the contingency fund?
no "reserve" line item exists. The annual surplus will automatically reduce, this is not a contingency plan.
how will a teacher be released, given the small school size, if the students missing are not all at one grade level? how will you decide what teacher to fire once the school year has started?
will not offering retirement further reduce the school's ability to compete? can this decision be made after payroll has been initiated?
who will cover admin functions if an admin is not hired? what about business functions?
how would "teacher, facility, food program, technology, and materials expenses would be significantly reduced?" How can these changes be made during the school year?
how do you arrive at 15:1 ratio?
what is included in "custodial services" and what will it cost?
if bookkeeping will be done by the admin, who will do it if this position is cut? what is the basis for thinking that one person can handle bookkeeping, clerical, office management, student tracking, etc?
the explanation of staff benefits here makes it clear that there are significant errors in the budget as noted earlier.
this response appears to indicate that the facility rent/lease amounts are fabricated based on guidance, without any factual basis?
What, specifically, will the Board pony up: "Additionally, board members are prepared to donate necessary resources and offer services to raise funds that will ensure FernLeaf's successful start up"?
What conversations have taken place with the named financing firms? why are more details not included here?

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	<p>what types of companies "defer leasing and invoicing" as indicated here? Why am i just now hearing that environmentalism is a core component of the founding of the school? - kvandawalker</p> <p><u>Budget Narrative</u> It's unclear whether it is possible to delay payment to the state retirement system. - kmullenupton</p> <p><u>Financial Audits</u> what is the basis for providing this level of detail to the board on a monthly basis? This section seems to imply that the board will be handling a significant amount of the financial and business functions of the school on a operational basis, which far overreaches the role of governance/oversight a board is meant to provide. there is little reason to believe that an admin staff of one or two people can appropriately segregate duties. - kvandawalker</p> <p><u>Financial Audits</u> Independent audit procedures were not described, but a thorough description of internal controls was included. - kmullenupton</p>
OVERALL	<p><u>Grade Levels Served and Total Student Enrollment:</u> Appendix A1 supports the projected figures. - kmullenupton</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Though FernLeaf is the only charter school in the area, the ability to acquire 44 students per grade level especially the testing third grade who are already comfortable with their friends may be a challenge in reaching an enrollment of 176 students in the first year. How can you guarantee that you will be able to reach the 176 students in the first year? - brian_smith2</p> <p><u>Appendices</u> The letters that are not included are the N/A ones. - brian_smith2</p>

<u>Charter School Advisory Board Subcommittee</u>	
Mission, Purposes, and Goals	
Education Plan	<p>Mr. Quigley inquired about the school calendar. The board chair responded they would have approximately 175 school days and over 1,025 hours. There were early release work days every Monday in the calendar. Mr. Quigley noted he was concerned about that.</p> <p>Mr. Quigley noted there were several programs that the school would be trying to implement. The board chair explained the project based learning, mastery learning and blended learning were the three programs. The project based learning would require a lot of teacher time and that was the rationale for having the teacher work days. Project based learning would be the overall umbrella. Mr. Quigley asked how the blended learning would fit into the curriculum. The board chair replied the blended learning would be integrating technology as much as possible. The mastery check list is more of an</p>

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	<p>assessment and be interactive between teachers and parents.</p> <p>Ms. Sutton inquired about the academic goals and why 80% would be held accountable for growth. The board member explained the term growth throughout the entire application is children learning in small incremental steps. 80% was chosen because it was a practical attainable goal. Ms. Sutton asked what about the academic bar. The board member explained goals one and two were based on MAP testing and it was based on growth. This was a measure to determine if 100% of the students were growing. Ms. Sutton asked if 80% of students making growth it was considered a good measure of growth for the school. The board member replied it was a baseline did not mean that there would be success because success is a complex issue. The board wants 100% of the students to have growth and 80% is a comparable success. It is ambitious and attainable. The school is expected to enroll a diverse population from the county. There was not a target of a specific group of students. The board is confident that the school is going to be rigorous. The county is 71% Caucasian, 14% Hispanic and 4% African American. There is a gap between the economically disadvantage and non-disadvantage.</p>
<p>Governance and Capacity</p>	<p>Ms. Nance asked if the board had thought about who the administrator would be. The person would be current board chair because he has the skills, knowledge and background. The board anticipates that he would be the principal. He will step down and be a nonvoting ex-ficio member.</p>
<p>Operations</p>	<p>Mr. Quigley inquired about the lunch program. A board member noted there was \$6,000 allotted for nutrition and they would not be using school lunch program. Students would be asked to bring their lunch. Students will be able to receive assistance. Based on the county average, 19 students will need this.</p> <p>Mr. Sanchez asked about the plan to educate the ELL students. The board responded out of 176, three of those students would attend the school. The plan is they would have a personalized learning plan. The small class size and problem based learning would give them a framework to thrive.</p> <p>* Mr. Walker noted the Hispanic population would be on the other side of the county. There is a need in the area and they have done a better job and had grown as a board. They have made changes to the budget and the changes are reasonable. Mr. Maimone stated he was thrilled they returned and had community interest. Mr. Quigley explained he was excited to see the executive committee had stayed the same. He would have liked to see more clarity on the education plan. Mr. Sanchez noted the school was going to start small but he was concerned with the ability of the board to articulate the must haves of the school. Ms. Turner noted she was pleased with the changes to the budget. There were some concerns with the education plan. Ms. Taylor noted she was not one hundred percent confident with what was said today and she had concerns. Just added just because there was a need in the area doesnt need the application needed to go forward. The CSAB is supposed to be setting boards up for success. Ms. Nance noted the year of planning would be important and the board needed to take advantage of it.</p>
<p>Financial Plan</p>	<p>Mr. Quigley noted finances was a barrier for not moving the group forward last year and asked what had changed from last years application. The board responded they partnered with the Accelerator Program and they were put into contact with various resources. More specifically there was an exact definition for how the budget was devised. Areas that needed to be strengthened were looked at another key area was the three tier contingency plan.</p> <p>Mr. Quigley inquired about the facility budget. The board member explained the price per</p>

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	<p>square foot was based on the market. The smallest number the school could open would be 52. Mr. Quigley asked if the schools in Henderson County were over enrolled. The average class size in middle school is 30. The transportation plan includes gas, bus, and maintenance. There would be targeted areas the bus would utilize. Teachers and staff would drive the bus. The board is expecting 50 children to participate in school bus.</p> <p>Mr. Maimone asked about the marketing plan for the first year. The board replied there was \$7,000 for marketing. There would be billboard and printing. The one to one out reach would be the most effective.</p>
OVERALL	<p>Mr. Walker made a motion to forward Fern Leaf Community Charter School for the Ready to Open process. Mr. Maimone seconded. Ms. Sutton asked a board member what areas the board needed to focus on the first year. A board member responded the ELL program needed to be clarified, as well as the transportation budget and lunch plan. The motion carried unanimously with Ms. Sutton abstaining.</p>

Overall Summary	
Initial Screening	The Office of Charter Schools deems this application complete.
10/24/2014	The CSAB voted unanimously to deem this application complete on November 14, 2014.
Application Review	<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: Mrs. Turner stated that the clarification provided by the applicant group was clear and straightforward. Mr. Walker asked a clarify question about the budget. Would the applicant group need 25 students to break even? The clarification from Barbara Barfield stated that they re-worked the budget after last year and that the applicant group had also amended the grade level. Mrs. Turner made the motion to move the applicant group forward to interview, Mr. Walker seconded the motion.</p> <p>In the full CSAB meeting, Mr. Quigley gave a synopsis from the subcommittees discussion. Mr. Quigley made the motion to move this application to interview. Mr. Walker seconded. The motion passed unanimously.</p>
Application Interview	<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 10 to 0.</p> <p>Mr. Walker made a motion to forward Fern Leaf Community Charter School for the Ready to Open process. Mr. Maimone seconded. Ms. Sutton asked a board member what areas the board needed to focus on the first year. A board member responded the ELL program needed to be clarified, as well as the transportation budget and lunch plan. The motion carried unanimously with Ms. Sutton abstaining.</p>
OVERALL	This application will move forward to Ready to Open.