



### 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  
Robin Kendall  
Becky Taylor  
Eric Sanchez  
Helen Nance  
Mike McLaughlin  
Paige Hirsch  
Marie Massengill  
Alex Quigley  
Sherry Reeves  
Mary Carmichael  
Tammi Sutton  
Alan Hawkes  
Steven Walker  
Phyllis Gibbs  
Kevin Piacenza

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**Date of Review:**

10/21/2014

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## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **Forsyth Preparatory Academy**

**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: Forsyth Preparatory Academy

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: *Triad Education Organization*

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: *David Edwards*

Title/Relationship to nonprofit: *CEO, Ignite Learning Partners - Board Advisor*

Mailing address: 124 Castle Bay Dr  
Hampstead NC 28443

Primary telephone: 252-268-2111 Alternative telephone: 252-268-2111

E-Mail address: dave@ignitek12.com

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

County: FORSYTH

LEA: 340-Winston Salem/Forsyth 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. Newpoint Education Partners and Ignite Learning Partners

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.

Please see Introduction Letter from the Board Chair in Appendix U1. Newpoint

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Education Partners and Ignite Learning Partners are currently providing technical services to the Board of a newly approved charter school in Pitt County, North Carolina.

Staff from Newpoint and Ignite worked closely with the Board of Directors to articulate a vision for the school and details regarding implementation. At the direction of the Board, Newpoint and Ignite staff drafted the application for Board review and approval.

Assistance with the application will end at the time of approval. It is intended that support for the School from Newpoint and Ignite will continue as per Newpoint's management agreement. Ignite is a partner continuing to provide Board development and technical support services.

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

No:

Yes:

*If so, Public  or Private:*

*If yes, please provide the current school or organization web site address:* 010303

*If a traditional public school, give the name and six-digit identifier of the traditional public school being converted:* 010303

*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>
<i>na</i>	<i>na</i>	<i>na</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?* Triad Education Organization

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

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

*Projected School Opening: Year* 2016

*Month* August

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*Will this school operate on a year round schedule?*

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (5*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,03,04,05	396
Second Year	K,01,02,03,04,05,06	490
Third Year	K,01,02,03,04,05,06,07	587
Fourth Year	K,01,02,03,04,05,06,07,08	684
Fifth Year	K,01,02,03,04,05,06,07,08	731

*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.*

stiles.forsyth

*Signature*

stiles.forsyth

*Printed Name*

David Edwards - Board Advisor

*Title*

09/26/2014

*Date*



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<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>Why is the conversion of an Alamance-Burlington school being relocated to Forsyth Co.? If this a conversion why are the items requested as part of Appendix A not applicable?</u>	<u>Kevin Piacenza</u>	<u>Cover Page</u>
<u>Enrollment targets seem aggressive and unrealistic, especially given that many of the grade levels are not natural transition points.</u>	<u>Paige Hirsch</u>	<u>Grade Levels</u>
<u>4.1% of the students in Winston Salem / Forsyth County Schools are projected to be attending Forsyth Preparatory Academy by year 5. This is unrealistic for the proposed region.</u>	<u>Robin Kendall</u>	<u>Grade Levels</u>

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Cheryl Turner</u>	
<u>Joe Maimone</u>	
<u>Robin Kendall</u>	<u>Pass</u>
<u>Becky Taylor</u>	
<u>Eric Sanchez</u>	
<u>Helen Nance</u>	
<u>Mike McLaughlin</u>	
<u>Paige Hirsch</u>	<u>Fail</u>
<u>Marie Massengill</u>	
<u>Alex Quigley</u>	
<u>Sherry Reeves</u>	
<u>Mary Carmichael</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	
<u>Phyllis Gibbs</u>	
<u>Kevin Piacenza</u>	<u>Pass</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:*

Forsyth Preparatory Academy is dedicated to improving the lives of its students by providing authentic learning experiences in a collaborative, nurturing environment that will build a foundation for students success in school, career, and in life.

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

Our founders came together with the goal of providing a unique opportunity for students interested in an innovative educational program that integrates an experiential-based program with a rigorous and relevant education that will allow students to develop and apply skills needed for success in the 21st century. This model has four key design elements that will provide students with a foundation for success: authentic learning, collaboration, a nurturing environment, and technology skills.

### **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.*

#### (1) Target Population

The School will focus its recruitment efforts on students who will benefit from authentic learning experiences in a collaborative, nurturing environment. The character traits of students who will excel at our School are students who:

1. Are able or willing to look at tasks in creative or unique ways (problem solving)
2. Are active learners with a need for kinesthetic learning experiences in addition to auditory/visual learning experiences
3. Prefer to work with others cooperatively and in teams rather than completing a majority of class work alone
4. Are able to rise to the challenge of ambiguity and energized by the possibility of multiple "right" answers
5. Have supportive families who are willing to commit to ensuring that students are present at school and complete their homework
6. Are willing to put forth effort into their own education
7. Work well, or show a propensity to work well, with other students

It is expected that the School's population will reflect the racial and

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ethnic composition of the school system, as described below. The School will attempt to achieve racial and ethnic balance by being open to any student residing within the school district and by openly marketing to every subsection of the potential student population. The School will be a public school and enrollment will not be denied to any eligible applicants on the basis of sex, race, religion, national origin, ancestry, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability.

## (2) Demographics of the School System

Forsyth County Schools is the 4th-largest school system in North Carolina. The district has approximately 54,000 students enrolled in grades K-12 in 81 schools (Source: <http://wsfcs.k12.nc.us/domain/4>). These schools include 43 elementary schools, 14 middle schools, 15 high schools, and 9 special schools. There is only 1 public K-8 school in the school district, The Downtown School.

It is expected that students who enroll in our School will reflect the demographics of the local school system. For the 2013/14 school year, the student demographics included 42% white, 29% black, 22% Hispanic, <1% American Indian/Hawaiian Pacific Islander, 2% Asian, and 4% Multi-Racial.

State assessment results for the school district (2012-13) show that 30.9% of students were proficient in both reading and math in grades 3-8, and 50.4% of students in grades 5 and 8 were proficient in science.

## (3) Rationale for Location and Student Body

Consideration was given to areas of need when determining the location, grades to serve, and enrollment projections. Major factors considered were: total population, school age population, household size, household income, free and reduced lunch qualification, charter competition and performance, and public school performance. All indicators were factored using a 5 mile radius from the city center. Based on historical enrollment data, most students who are enrolled in a local charter will reside within a 3 to 5 mile radius of the school. Evidence of educational need, including a comprehensive market analysis, are included in Appendix A.

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

The total projected enrollment at the charter school will be 750 students in Kindergarten through 8th Grade. This reflects 4.1% of the ADM for the same grades of the LEA.

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

Our School aligns with many of the goal areas in the Strategic Plan of the LEA (<http://wsfcs.k12.nc.us/Page/15>), Forsyth County Public Schools:

- \*Globally competitive students who can demonstrate academic proficiency.
- \*21st century personnel as evidenced by the recruitment, hiring, and retention of qualified personnel for all positions.
- \*Safe and caring schools.

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However, our plan for achieving these goals, specifically our educational design, differs from other schools in the school district. Our School will provide a unique opportunity for students interested in an educational program that allows them to focus their academic efforts toward an experiential-based program that offers a rigorous and relevant education. This challenging and hands-on program is not generally available in most traditional elementary or middle school settings.

There are currently 43 elementary, 14 middle, 15 high schools, and nine special schools in the district. There are no schools with an integrated educational program design similar to our proposal.

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

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

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

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

#### Professional Opportunities

Professional development opportunities will incorporate evidenced-based strategies and resources aligned with the School mission and proven to be successful with our target population. Teachers will work together in Professional Learning Communities to develop instruction focused on the use of Project Based Learning (PBL), literacy, cooperative learning, integration of technology into instruction, higher-order competencies, differentiation, team teaching, and development and use of assessments.

Teachers will have a voice in the leadership of the School through staff meetings, committee meetings, and School Advisory Council. Teachers will be empowered to plan lessons within the general themes set within the curriculum, so long as they can justify the standards and objectives of individual projects. When teachers are held accountable for their students' instruction and have the ability to make decisions in their students' best interest, phenomenal things are possible.

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#### Accountability for Results

Our School will be accountable for meeting measurable student achievement results by ensuring that students obtain the essential elements of the Common Core State and North Carolina Essential Standards. Responsibility and accountability will be aligned to ensure academic success.

Assessment data will be important for identifying the strengths/needs of students early in the school year, informing instruction, and monitoring individual progress over time as well as overall progress towards meeting the School's SMART (specific, measurable, attainable, relevant, and time-based) goals. A variety of assessments, including diagnostic, formative, and summative, will be used to inform instruction and evaluate performance. The School's Director will be responsible for regular review and analysis of disaggregated assessment results, at a minimum, 3 times annually. Teachers and administration will meet for Monthly Data Chats to ensure data and student progress are fully understood, and instructional practices and interventions are being implemented with fidelity. In depth analyses will be conducted to determine if results can be improved with changes to instructional strategies, curriculum, or other variable.

#### Expanded Choice

Our School will provide expanded choices in the types of educational opportunities that are available within the public school system by providing a unique opportunity for students interested in an educational program that allows them to focus their academic efforts toward an experiential-based program that offers a rigorous and relevant education. This challenging and hands-on program is not generally available in most traditional elementary and middle school settings.

Innovative Teaching, Increased Learning Opportunities, Improved Learning  
The School will improve student learning and academic achievement by providing increased learning opportunities for all students, including students at-risk and/or gifted, and will place special emphasis on low performing students and reading through the use of innovative teaching methods and the integration of technology in all aspects of student learning. The educational program at the School has 4 critical elements that align with our mission to provide students with a foundation for success at school, career, and in life: authentic learning through PBL, collaboration, a nurturing environment, and technology skills. Learning will be systematic, practical, and engaging. Therefore, student involvement on a given task will be broad, deep, and cross-curricular.

Improved learning will be supported with a Standards Tracking System that will allow teachers to identify which state standards are taught, and after instruction, to identify the mastery level of individual students. Students not meeting required benchmarks will receive targeted assistance. Student progress will be assessed, analyzed, and reviewed by the RtI School-Based Leadership Team.

#### **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*

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*governing board and other stakeholders.*

(1) Academic Goals

In order to meet the School mission of building a foundation for students' success in school, career, and in life, it is essential for students to demonstrate proficiency in academic skills. To that end, academic SMART goals aligned with our mission have been identified. The basis for the School goals is the Performance Composite of the local school district. This measure identifies the percentage of students who are proficient on all end-of-grade and end-of-course tests combined. Our School will meet the performance of the district in Year 1 and will demonstrate continuous improvement over the next 4 years of operation to exceed district performance.

The Performance Composite for Forsyth County Schools for school year 2012-13 was 42.8%. With this as the baseline, the proposed School goals are:

Year 1, 44% of students will demonstrate academic proficiency.

Year 2, 49% of students will demonstrate academic proficiency.

Year 3, 54% of students will demonstrate academic proficiency.

Year 4, 59% of students will demonstrate academic proficiency.

Year 5, 64% of students will demonstrate academic proficiency.

Students in K-2 will demonstrate proficiency as measured by Discovery Education Assessments (DEA). Students in grades 3-8 will demonstrate proficiency as measured by state assessments.

(2) Operations, Finance, Governance, and Communication Goals

Operations, Finance, Governance, and Communication goals have also been identified for the first 5 years of operation. The proposed goals are intended to support implementation of the School's mission and meet the needs of the target population.

Operations: All required School reports will be submitted in full by required deadlines.

Finance: The School will have clean annual audit reports with no more than 2 findings and any previous year's findings corrected.

Governance: The Board will provide public notice and meet regularly in compliance with state requirements and the Board's bylaws.

Communication with the Board and Stakeholders: Information will be shared with stakeholders through regular school reports from the Director detailing progress made to the Board, Authorizer, School leadership team, and EMO; an annual report to the State Board of Education; and access to the READY Accountability results online by all stakeholders. The School will communicate weekly with parents. (See Sample newsletter in Appendix U2.)

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

As mentioned above, in order to meet the School mission of building a foundation for students' success in school, at career, and in life, it is essential for students to demonstrate proficiency in academic skills. The School intends to utilize Discovery Educational Assessments (DEA) to measure and demonstrate academic growth and achievement for all students in Reading, Language Arts, Mathematics, and Science. Each student will take an initial assessment upon entry into the program to gauge current performance levels and identify academic strengths and weaknesses. Program placement, including

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remediation of any skills gaps, will be based on: objective educational data from DEA, as well as other measures, such as previous state assessment scores, other standardized assessment scores, and previous educational placement and progress.

Students will be assessed up to 2 more times with DEA during the year for formative measures of progress and at the end of each school year for summative data. The School believes that data driven decisions are essential for making decisions regarding individual student educational needs, attaining the School mission, and guiding each student toward the path to graduation.

Regular school reports from the Director will be provided to the Board during each school year detailing progress at the School, grade, and classroom levels.

Additionally, parents or guardians will be given the opportunity to evaluate the School through an annual satisfaction survey. The survey results will be reviewed and analyzed by Administrators, Board members, and EMO staff.

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<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Mission is same as Piedmont. Will this model differ at all?	Kevin Piacenza	Mission Stat
Appendix A includes community support information regarding evidence of educational need. The applicant conducted a survey, it is unclear how many people responded to the survey. Substantial evidence of educational need is not included.	Robin Kendall	Educational
It appears that the school was designed in an attempt to offer a specific educational program, not necessarily in response to an identified need. The statement, "The school will focus its recruitment efforts on students who will benefit from authentic learning experiences in a collaborative, nurturing environment. The character traits of students who will excel at our School are students who..." raises concerns with respect to access and whether the school has a specific kind of student in mind, rather than being able to provide anyone who applies with a high-quality education.	Paige Hirsch	Educational
Same as Piedmont Prep.	Kevin Piacenza	Purposes of
Teachers: this explanation does not seem to qualify notably "new" in terms of what most teachers experience in schools; many teachers are in PLCs, attend staff meetings, etc...	Paige Hirsch	Purposes of
The stated areas of operations, finance, and governance are expectations of all public schools in North Carolina, not SMART goals. The process of how the governing board will monitor the progress of these performance goals is unclear since some of them are state requirements and not goals.	Robin Kendall	Goals for th
Goals for academics are based on one composite measure and for operations and other functions are non-existent.	Mary Carmichael	Goals for th
With current Guilford students at 43.2% proficient, the goal of 44% proficiency in its first year seems less than ambitious. There is no year-to-year matched cohort growth measure, or other relative growth measure. Given the school's intended use of DEA, it seems reasonable to expect a growth metric based on its use. "Regular reports" is not defined-is this monthly? Quarterly?	Paige Hirsch	Goals for th

<b>Reviewer</b>	<b>Score</b>
Cheryl Turner	
Joe Maimone	
Robin Kendall	Pass
Becky Taylor	
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Paige Hirsch	Pass
Marie Massengill	
Alex Quigley	
Sherry Reeves	
Mary Carmichael	Pass
Tammi Sutton	
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	
Kevin Piacenza	Pass



### 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.

##### a. Program

The School will employ an instructional model that will allow students to develop and apply the skills needed for success in the 21st century. The educational program at the School has 4 critical elements that will provide students with a foundation for success at school, career, and in life: authentic learning, collaboration, a nurturing environment, and technology skills. Each of these elements are described in detail in the response below.

##### b. Methods

The main authentic instructional approach will be Project Based Learning (PBL). PBL promotes critical thinking skills and a deep understanding of concepts, which aligns with the rigor of state assessments. At the heart of successful PBL is the teacher's ability to support and direct students (or conversely, the ability to let them struggle with a problem or information as they search out answers and solutions). This requires interpersonal and communication skills, and also includes understanding that students finish work at different rates, with different abilities, aptitudes, and learning styles.

Additional instructional strategies used throughout the curriculum will be: scaffolded instruction, modeling, cooperative learning, group and independent student projects, questioning strategies, and informal learning experiences.

##### c. Assessment

The School will use diagnostic, formative, and summative assessments.

The School intends to utilize Discovery Educational Assessments (DEA) to measure academic growth and achievement for all students in Reading, Language Arts, Mathematics, and Science. Students will be assessed up to 3 times with DEA during the year for formative measures of progress and at the end of each school year for summative data. The School believes that data driven decisions are essential for making decisions regarding individual student educational needs and guiding each student toward the path to graduation.

Formative assessments will provide snapshots of student performance and teachers will be able to immediately adjust instruction to improve academic outcomes. The School will use quizzes, tests, and classroom-based

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assessments to inform and improve instruction. Running records, project work, and other teacher created activities will play a vital role in allowing the teachers to form a comprehensive understanding of student abilities. Additionally, a Standards Tracking System (STS) will be developed that will allow teachers to identify the State Standards that individual students have mastered.

Summative evaluations, including required End-of-Grade tests for students in Grades 3-8; and end-of-chapter and end-of-unit tests in Reading, Math, Science, Social Studies, and Writing, will also be used.

This assessment regimen will ensure that a comprehensive assessment system is in place to provide continuous and accurate information about students' abilities, progress, and needs.

#### d. Meeting Student Needs

The educational program at the School will help all students master the state standards by providing rigorous instruction aligned with the standards and supported by a research-based curriculum. Our instructional methods will be respectful of how children learn best to ensure that the knowledge and skills required by the state standards are mastered and retained. By providing students with a creative, nurturing and collaborative environment, students will experience a high degree of success and will be able to meet their individual potentials.

Assessments will provide valuable data to determine which students need additional interventions. Staff specialists will be available to provide small group and individualized instruction when necessary for those students who are struggling with individual concepts or who have been determined to be below grade level in Reading and/or Math. Students who qualify for Special Education services will also receive services from qualified staff members based on the services and identified needs of their IEPs.

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

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

The instructional model, aligned with the mission, has 4 critical elements: authentic learning, collaboration, a nurturing environment, and technology skills.

#### (1) Authentic Learning

The main authentic learning approach at the School will be Project Based Learning (PBL). PBL promotes critical thinking skills and a deep understanding of concepts, which aligns with the rigor of the state assessments. The model includes: an open-ended Driving Question or Challenge; a need to know essential content and skills; inquiry to learn and/or create something new; critical thinking, problem solving, collaboration, and communication; student choice; feedback and revision; and publicly presented product or performance.

#### (2) Collaboration

In a PBL model student teams will contribute to group efforts to master

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content and standards. They must listen to others and make their own ideas clear. Depending on the project, students may be asked to collaborate with same-age peers in their class or in another class, with older or younger students in another grade, or with members of the local community.

The School will require that teachers collaborate to plan projects and lessons in order to build on the strengths and interests of each team member. A key component in the design of the School will be physically adjoined classrooms, allowing classes to work together. Flexible groupings will be easy to implement, allowing teachers to focus on students who may need targeted instruction or support.

Elementary classes will not exceed 22:1, middle school will not exceed 25:1.

### (3) Nurturing Environment

A nurturing environment will support children's social and emotional development, which are essential to academic success. Every effort will be made to support children as they learn to trust themselves and others, manage conflict, and take risks. This will be evident through a school-wide behavior plan that ensures a safe, respectful atmosphere where students feel supported and comfortable.

An important element of nurturing the development of our students will be our relationship with their parents. These relationships will be encouraged by supporting effective home-school communication to ensure that students are wrapped in an environment at school that is an extension of their home.

### (4) Technology Skills

Students at our School will develop increasingly sophisticated technology skills as they use technology as a tool to access, evaluate, and express information. Students in K-3 may focus on basic computer operations, using search tools, using digital cameras, and becoming comfortable with the interactive whiteboard. Students in grades 4-8 may use technology to create multi-media presentations, improve keyboarding skills, create and use databases, and communicate with people locally, state-wide, and across the nation.

The School supports the safe, ethical, and legal use of technology resources and will provide for compliance with the acceptable use of technology through appropriate student supervision and filtering techniques and software.

### (5) Foundation for Success

The foundation of our School will be preparing students for success in school, career, and in life. A curriculum focused on PBL, enriched with technology, in a collaborative and nurturing environment is an innovative concept at the elementary/middle levels. By embedding instruction into real world, project-based experiences, students will learn more efficiently than with a typical curricular approach. This real life application of learning will motivate and engage students to more effectively apply and retain the essential knowledge and skills they are learning.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core*

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*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.*

All curriculum materials proposed for use at the School have been selected because of their alignment with the state standards and the School's model as well as because of the research-base supporting these materials. Specifically, these curricula support integrated curriculum, project-based learning, technology integration, and critical thinking skills.

The core Reading/Language Arts curricula will be Macmillan/McGraw-Hill Treasures for K-5 and Literature 2010 for grades 6-8, along with the "6+1 Trait Writing" program. The Treasures series offers daily support for students that are approaching level, on level, beyond level, and the English Language Learner. The leveled readers in Literature 2010 include explicit skill instruction, vocabulary development, writing, assessment, teacher support, and ancillary student support.

Reading Triumphs from Macmillan/McGraw-Hill will be the curriculum used with below grade level elementary readers for Tier 2 and Tier 3 instruction and interventions. This is a comprehensive intervention curriculum that includes explicit instruction, additional practice opportunities, and validated diagnostic and prescriptive tools. This curriculum includes a plethora of resources to allow teachers to customize instruction to students' unique needs.

The School intends to use Reading Plus and Apex Reading Skills and Strategies as the primary intervention reading curricula for Tier 2 and Tier 3 instruction and interventions for below grade level readers in grades 6-8.

Math skills will be integrated into PBL, but a separate time will be given to math instruction. The core Math curricula will be GO Math! for K-5 and Pearson's Connected Mathematics for grades 6-8. GO Math! emphasizes Big Ideas and depth of understanding through interactive lessons, research based instructional approaches, best practices from around the world, and differentiated instructional resources to ensure student success. Connected Mathematics is an innovative middle school program which helps develop understanding of important mathematical concepts, skills, procedures, and ways of thinking and reasoning, in number, geometry, measurement, algebra, probability, and statistics. The School will utilize MathSteps from Houghton Mifflin Harcourt as the intervention math curriculum for Tier II and Tier III students.

Two curricular material sets will be used for Social Studies for grades K-5: Social Studies Alive!, supplemented by Harcourt's Social Studies: North Carolina Geography, History, and Culture Fourth Grade textbook. For grades 6-8, the School intends to use North Carolina History: A Digital Textbook in addition to Pearson - Prentice Hall History of Our World in World History,

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World Explorer: People, Places and Cultures in World Geography, America: History of Our Nation in American History, and Civics: Government and Economics in Action in Civics.

The elementary Science program will be Pearson's Scott Foresman Science. This program offers many opportunities for hands on experiences related to the subjects being studied. The actual sequence of the instruction will be modified to incorporate the project based themes being used within the School. Scientific inquiry and the science standards will be heavily infused into the project designs to ensure students are meeting the required standards.

For middle grades, the School intends to use Pearson-Prentice Hall's Science Explorer and Event-Based Science in Life Science, Earth Science, and Physical Science Courses. The Science Explorer text includes hands-on science inquiry opportunities, visual learning, reading support, and educational technology. Event-Based Science is a research and standards-based program that allows students to explore content through hands-on activities, newspaper articles, and data collection, while testing out hypotheses. Working in teams on an authentic task, they assume the roles of professionals working in the field.

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.*

A variety of instructional strategies supported by current research will be used to ensure that students have the knowledge and skills required to be successful within a PBL framework and demonstrate increased academic achievement. Best pedagogical practices, including the 9 research-based instructional strategies identified by Marzano, Pickering, and Pollock (2001), will be incorporated throughout instruction. These strategies have been found to have positive effects on student achievement.

\*Setting objectives and providing feedback helps students to develop their own metacognitive abilities and a general awareness of both what they are learning and how they are learning it.

\*Using cues, questions, and advance organizers helps students develop greater interest by encouraging deeper connections to presented information, and supports the tendency of the brain to organize knowledge for long-term storage and recall.

\*The use of nonlinguistic representations addresses key visual elements in different learning styles and modalities, and supports dual-coding of various stimuli to increase neural activity.

\*Identifying similarities and differences is a core strategy for initial processing of information.

\*Summarizing and note-taking supports the natural plasticity and pruning functions of the brain as it selects information to both cross-code into memory and personalizes it into meaningful chunks of content for deeper understanding.

\*Generating and testing hypotheses supports research in both inductive and deductive thinking as actions that inherently trigger connections with prior knowledge.

\*Homework and practice support the memory enhancing strategy of rehearsal, while cooperative learning naturally increases episodic intensity in learning new information.

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Ample opportunities will be provided for students to delve into cross-curricular topics through an integrated curriculum approach so that students recognize that subject areas do not stand in isolation from one another. The strategies identified by Marzano, et al. can form a working framework for instructional delivery that is strongly supported by current brain-based research and will be integrated into all content area instruction.

Teachers will also integrate the principles of brain-based learning throughout instruction. According to Madrazo and Motz (2005), brain-based learning is the use of "research in neuroscience on how the brain works to gain an understanding of how students learn and develop in a classroom." Brain-compatible instruction is education that is specifically tailored to reflect current knowledge of how the brain processes and utilizes knowledge. The underlying rationale behind the value of brain-based learning is that neural connections in the brain, those connections that represent the formation of knowledge, are dynamically created and modified throughout a person's lifetime (Berger, 2005). This potential for continual growth in response to new information is critical to the efforts of modern educators to advance the concept and value of lifelong learning. Madrazo and Motz (2005) described this trait of plasticity in the working functions of the brain as the fundamental advantage in enhancing the retention and recall of knowledge, the common goal of both the educator and the learner. Banikowski and Mehring (1999) stated succinctly that "for educators, memory is the only evidence that something or anything has been learned." Tapping into the power of memory must become a priority for educators.

Brain-based learning includes creating a safe climate for learning, encouraging a growth mind-set, emphasizing feedback, getting bodies and brains in gear, starting early, and embracing the power of novelty (Edutopia, 2011). These strategies for brain-based learning are a natural fit with the elements of our educational model. The instructional methods to be implemented have been carefully selected to actualize brain-based learning in every classroom.

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.*

The School's proposed educational design, including the curriculum and instructional strategies, have been chosen based on alignment with the School's mission and demonstrated effectiveness with the target population to ensure student readiness to transition from grade to grade and to the next span. To further ensure that students are well prepared for promotion, the School will utilize Discovery Educational Assessments (DEA) to measure and demonstrate academic growth and achievement for all students in Reading/Language Arts, Mathematics, and Science.

Each student will take an initial assessment upon entry into the program to gauge current performance levels and identify academic strengths and weaknesses. Program placement, including remediation of any skills gaps, will be based on: objective educational data from DEA, as well as other measures, such as previous state assessment scores, other standardized assessment scores, and previous educational placement and progress.

Students will be assessed up to 2 more times with DEA during the year for formative measures of progress and at the end of each school year for

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summative data. The DEA assessments are state-aligned computerized adaptive tests that accurately reflect the instructional level of each student and measure growth over time. The School believes that assessment should provide students with a chance for success, be engaging, respect regular course time, and provide useful information.

DEA assessments provide accurate results that can be used to

- \* Predict proficiency for Reading, Language Arts, Math and Science, and Social Studies
- \* Screen students to identify risk for academic failure
- \* Measure academic growth within and across years
- \* Monitor progress on state standards
- \* Analyze student performance using reports that show proficiency, state and national percentiles, percent correct, item difficulty, and content mastery

The School believes that data driven decisions are essential for making decisions regarding individual student educational needs, attaining the School mission, and guiding each student toward the path to graduation. To ensure that students are on track for promotion, assessment results will inform decisions about student needs at the School, classroom, and individual levels. Data analyses will reveal the need for adjustments to the educational program design, curriculum resources, and/or instructional strategies.

Specifically, data will be used to immediately adjust instruction to improve academic outcomes for whole classes, small groups, and individual students. Training and ongoing professional development will address these topics throughout the year. Discussions during Professional Learning Community (PLC) meetings will allow teachers to share best strategies and practices and classroom challenges with each other.

DEA assessments include analytical tools that provide information educators can use to make data driven decisions and drive differentiated instruction. Educators have access to information including percentile rank, achievement score, projected proficiency on state tests, and growth for each student from year to year. DEA can provide detailed reports that drill down to individual student mastery of content area sub-skills aligned to state standards.

Teachers and administration will meet monthly to discuss data and evaluate instructional practices as well as resources. Monthly Data Chats will be held to ensure data and student progress are fully understood, and instructional practices and interventions are being implemented with fidelity.

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

The School will follow the same annual calendar as the local school district

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regarding which days schools are in session. However, the School will determine its own hours of operation and will meet or exceed statutory requirements (GS 115C-84.2). School will begin at 8:10 AM and students will be dismissed at 2:40 PM.

The calendar and daily schedule will support the School's mission and education plan by allowing for:

\*uninterrupted blocks for reading and math (during which time these subject areas will be the primary focus, but aligned with the content of the projects currently being completed by the class).

\*integration of Language Arts (reading, writing, speaking, and listening) and math throughout science and social studies themes to provide for additional instruction and application of key skills.

\*the use of a reading specialist to work with as many students as possible.

\*recess time that allow for creative/constructive play and expression.

Middle school students will work with a team of teachers who integrate their curricula frequently. Thus, there will many opportunities for flexible scheduling to include block periods that allow teachers to work with students for an extended time period on integrated lessons and activities.

The School may offer additional instructional time through the use of extended school days, summer school, or classes on weekends based on the needs of the students and the School's academic performance.

### **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.*

The School's innovative educational model will ensure that all students will engage in and benefit from the curriculum. We believe that through the use of authentic, collaborative learning and differentiated instruction we can meet the needs of both those advanced students who need additional challenge in the classroom, and those who may be struggling academically. In addition, a reading resource teacher will be hired to work with students who are struggling with reading.

The School will implement a strong Responsiveness to Instruction (RtI) process for students who are not performing at expected levels: ensuring continued progress and academic growth. Research-based interventions, a philosophy advocating an educational process of continuous reflection, rethinking, and restructuring of strategies, will be afforded to students. The School will have an Intervention Assistance Team (IAT) to apply a progressive change system utilizing consensus building, infrastructure development, and implementation. The system will revolve around the study and optimization of the interactions of curriculum, instruction, assessment, students, and learning environments.

RtI will be implemented based on the recommendations and technical assistance information available from the North Carolina Department of Public Instruction. RtI is "the practice of providing high-quality instruction and interventions matched to student needs, monitoring progress frequently to make decisions about changes in instruction or goals and applying child response data to important educational decisions" (NASDE,



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2005). The model uses 3 tiers of interventions that become increasingly more focused, intense, and individualized.

Tier 1 will focus on strong core programs using research-based curricula. The School will have systems in place to regularly review and analyze data on student progress at the school, grade, classroom, and individual levels. Adjustments will be made through whole and small-group differentiation of instruction based on analysis of student data and identified areas of need for additional opportunities for learning. Data analysis will reveal those students who continue to demonstrate achievement that is not at a commensurate pace as their peers. Differentiation will allow these students to become proficient by allowing them to learn the materials in ways that suit their unique needs. This could include small groups, modifying materials, additional practice, and changes to materials or scope of task all while in the general classroom.

Tier 2 will focus on students who need additional academic support beyond what can be provided through differentiation in the general classroom for all students. Additional screenings may be provided to these students to pinpoint specific areas of strength and need. Interventions will be provided in a small group setting with more frequent progress monitoring than is used in the general classroom. Increased time for instruction in the target area will be provided.

Tier 3 will focus on students who require intensive, focused, small group or individual interventions of longer duration than that which is provided in Tier 2. Tier 3 interventions will include targeted content and specialized instruction with extraordinary time and focus. Individual assessments will be conducted to provide frequent monitoring of student progress.

Throughout the RtI process, student progress will be assessed, analyzed, and reviewed by the IAT. This team will include the student's teacher, an administrator or designee, a Special Education teacher, and other personnel as appropriate. The team will be responsible for tracking school-wide academic growth; documenting student need, interventions, and results; making decisions about the effectiveness of instruction; making recommendations for adjustments to instruction and/or interventions; and initiating referrals for evaluation for specially designed instruction and/or related services.

## *2. Explain how the instructional plan and curriculum will meet the needs of English Language*

*Learner (ELL) students, including the following:*

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

The School will comply with all state requirements for Limited English Proficiency Programs (GCS-K-000).

### *(1) Identification*

At enrollment, all students will be given a Home Language Survey, unless such a form already exists in that student's cumulative records. If the parent indicates a positive response to any of the questions on the HLS, the

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student will be scheduled for a more formalized assessment with the WIDA ACCESS Placement Test (W-APT) within 30 days after the start of the school year or 14 calendar days after enrollment. If the student is identified as LEP, the W-APT will provide guidance concerning which tier of the English Language proficiency test should be administered to the student. The score on the W-APT also determines eligibility for state LEP testing accommodations.

## (2) Instruction

The ELL Committee Chairperson, English as a second language (ESL) teacher, and other appropriate school personnel will work together to determine each ELL student's academic achievement level to ensure appropriate grade level placement and scheduling. This school team will review prior school records and transcripts to determine academic knowledge and experience of the student. Students with limited or no prior school experience will be assessed and placement will be made based on the student's age, regardless of English proficiency.

The School will provide instruction for limited English proficient (LEP) students that will provide a reasonable chance of allowing LEP students to progress in school. The program may be one of the following: ESL, bilingual education, or programs which adapt instruction to meet the needs of these students.

The ELL Committee will plan together the means for instruction in the English language and any specific accommodations that will be most appropriate for English instruction. All ELL students enrolled in the School will be entitled to programming that is appropriate to their level of English proficiency, their level of academic achievement, and any special needs they may have. All assessment information and instructional accommodations will be reflected in the ELL Student Plan.

ELL students will have equal access to appropriate English language instruction in the core subject areas that is: (1) understandable to their given level of English proficiency; and (2) equal and comparable in amount, scope, sequence, and quality to that which is provided to English proficient (non-ELL) students. General curricula and materials will be the same as those used with non-ELL students. The schedules of ELL students will be comparable to those of non-ELL students containing the same subject area classes and are equal in scope, sequence and content.

Evaluative standards will be adopted for measuring the progress of LEP students in school. In order to determine when students no longer need assistance, the LEA shall determine the content knowledge and language skills necessary for successful functioning in the regular classroom. Then, multiple instruments as well as teacher judgment may be used to evaluate English listening and speaking skills, English literacy skills, and content area knowledge. The students shall not be maintained in alternative language programs longer than necessary based on program exit criteria.

## (3) Monitoring and Evaluation

All students identified as LEP will be administered the Assessing Comprehension and Communication in English State-to-State for English Language Learners (ACCESS for ELLs) annually during the state testing window. This test is an annual assessment of English language proficiency in

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the areas of listening, speaking, reading, writing, and comprehension in English. The results of this test will be used to measure students' progress and proficiency in the English language.

ELL students who are exited from the program shall be monitored for a minimum of 6 months. Additional academic and English language support will be provided if students begin to have difficulty.

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.*

The School will comply with all state requirements for Academically or Intellectually Gifted Students (AIG) (GCS-U-000).

#### (1) Identification

Screening, referral, and identification policies and procedures will be adopted that include multiple measures to identify AIG students. These measures may include results from state assessments, DEA, and classroom assessments; as well as evidence from student work and teacher observation in order to develop a comprehensive profile of student achievement and aptitude. The School will ensure that the rights of AIG students and their parents are safeguarded, and will document written consent regarding identification and placement, reassessment, and exit.

#### (2) Instruction

The School's educational program design is well suited to meet the needs of AIG students and meets the requirements of the North Carolina Academically or Intellectually Gifted Program Standards through authentic, project-based, collaborative learning experiences. Services to AIG students will include meaningful content and learning opportunities that focus on the use of higher-level thinking skills, and advanced content and skills that will support students' academic growth. Instructional strategies will be differentiated to provide challenge that is appropriate to each student's abilities, readiness, and interests. Teachers will integrate content of greater depth, breadth, abstractness, and/or complexity than that provided to non-gifted same-age peers.

Instruction will be documented on a Differentiated Education Plan (DEP) that is reviewed annually with parents to ensure effective programming that meets each student's individual needs.

#### (3) Monitoring and Evaluation

Monitoring and evaluating the progress and success of AIG students will be the same as for all students. Baseline data will be important for identifying the strengths and needs of our students early in the school year and monitoring their progress over time. To obtain a baseline for student achievement the School will collect the following data:

- \* Previous school year grades
- \* Previous scores on state assessments, where applicable
- \* Baseline data from a nationally recognized norm referenced instrument, such as Discovery Educational Assessment (DEA)

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The data will be used to establish a baseline from which to measure student learning gains, develop instructional plans, and develop individual progression plans. Teachers will utilize the data to assist in the development of lesson plans, creation of individual learning plans, and staff development.

The School intends to utilize DEA to measure and demonstrate academic growth and achievement for all students in Reading, Language Arts, Mathematics, and Science. Each student will take an initial assessment upon entry into the program to gauge current performance levels and identify academic strengths and needs. DEA testing will be done in the classroom setting with a highly qualified teacher at all times.

Students will be assessed up to 3 times with DEA during the year for formative measures of progress and at the end of each school year for summative data. The state assessment will be administered in the spring according to the state administration schedule. The results of each of these assessments will allow teachers and administrators to compare the baseline rates to the academic progress of these students attending our School. Teachers will receive in-service training in how to analyze their classroom data as well as how to generate action plans for students based on the data.

### **Exceptional Children**

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

### **Identification and Records**

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

#### (1) Identification

The School will comply with applicable state and federal policy, including the Individuals with Disabilities Act (IDEA) and Section 504 of the Rehabilitation Act of 1973, including all reauthorizations and additional applicable regulations.

#### (a) Students with Disabilities

As discussed above, the School will implement a Responsiveness to Instruction (RtI) process. If a student fails to thrive after receiving effective instruction and intensive, high quality intervention that has been

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carefully implemented and monitored, (s)he will be referred for an initial evaluation, which will be conducted before the initial provision of special education and related services. The evaluation team will consist of the individualized education program (IEP) team and other qualified professionals. The initial evaluation will be conducted within 60 days of receiving parental consent for evaluation and will determine if the student is a student with a disability in accordance with state law and determine the student's educational needs. If the student is found to qualify for special education and related services, an IEP will be developed.

#### (b) Section 504

To be protected under Section 504, a student must be determined to: 1) have a physical or mental impairment that substantially limits one or more major life activities; 2) have a record of such impairment; or 3) be regarded as having such impairment. The School will provide a free appropriate public education (FAPE) to qualified students who have a physical or mental impairment that substantially limits one or more major life activities.

Student records will be evaluated to determine if a 504 plan is already in effect. If so, the 504 Coordinator will notify the student's teacher and other relevant school staff members. The student's parent(s) will be informed that the teacher will be the primary contact at the School and that the School will carry-out the services/accommodations in the 504 plan. All 504 Plans will be reviewed in accordance with the review date.

#### (2) Child Find

The School will comply with all state (NC 1501-2.9) and federal requirements for Child Find. Policies and procedures will be developed that ensure that all children with disabilities who are in need of special education and related services are identified, located, and evaluated. This will include children who are suspected of having disability and in need of special education, even though they are advancing from grade to grade.

Within 30 days of receipt of written notification of concerns regarding a child, the School shall issue a written response to the child's parent. The response shall include either an explanation of reasons the School will not pursue the concerns or a date for a meeting at which the School and parent will review existing data and determine whether a referral for consideration of eligibility for special education is necessary. Such meeting will be held within a reasonable periodof time.

#### (3) Records

Reasonable steps will be taken to promptly obtain records (including copies of current IEPs and supporting documents, and any other special education or related services records, pursuant to 34 CFR 99.31(a)(2)) from previous schools of all enrolled students, including students with disabilities.

The School will ensure that all student records are kept confidential as required by applicable state and federal law, including the Family Educational Rights and Privacy Act (FERPA). Official records will be maintained permanently. Parents shall be allowed to inspect and review the student's records upon written request.

All required student records will be prepared and stored in a manner consistent with state statutes. All student and financial records will be

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stored electronically on dedicated servers and on special backup tapes. In addition, paper versions of student and financial records will be stored in secure cabinets or be reduced to electronic documents for storage.

### 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) Educational Services

The School will provide a continuum of placements, which will include but may not be limited to: regular classes, resource room, and homebound/hospitalized. Students will be placed in the least restrictive environment possible. A student with a disability will only be removed from a regular classroom if the nature or severity of the disability interferes to such a degree that education even with additional supports and services cannot be satisfactorily achieved in a regular class.

The School shall provide the accommodations and related services on the student's IEP as necessary to permit access to the general curriculum as appropriate for the student. Accommodations shall include, but are not limited to: presentation, response, setting, scheduling, test accommodations, pacing and remediation, and adaptive technologies.

Students who do not have success in the general classroom with the above mentioned accommodations will work directly with the EC teacher in individual and small group settings. Instruction will be based on formative and summative assessments in all academic areas, as well as observations of student performance. Students will be grouped flexibly based on assessment results and the skill to be taught, so that individual skills and learning differences can be taken into account. Alternative resources may be utilized so that each student has the opportunity to successfully access the regular curriculum. In cases where the foregoing solutions are not working and a greater disability is suspected, the IEP team will meet to review the student's IEP, making necessary revisions to permit students with disabilities to access learning opportunities on the same basis as general education students.

The School will initially employ 1 full-time EC teacher and is planning to add a second (part-time) EC teacher in year 2. The on-site teachers will primarily serve students identified with learning disabilities, emotional/behavioral disorders, and others as appropriate. The staffing will be adjusted based on the number of students with disabilities who enroll and the services required.

#### (2) Support for FAPE

The School will have a policy of enrollment, which is non-discriminatory, provides a free and appropriate public education (FAPE), and adheres to the IEP developed for each student. The School will accept all eligible students

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who reside in the school district. In accordance with federal and state antidiscrimination laws, the School will not discriminate on the basis of any legally protected category in the admission of students. The School has designed an enrollment process that will ensure that students with disabilities will have an equal opportunity of being selected for enrollment in the School.

### (3) IEPs

An IEP will be developed for each student eligible to receive Exceptional Children (EC) services that will consider the parents' concerns, and student's strengths, evaluation results, and academic, developmental, and functional needs. Language needs of ELL students with disabilities will also be considered.

The EC teacher will be responsible for (a) ensuring that IEPs are provided to each general education teacher serving a student with disabilities and (b) monitoring IEP implementation. The progress of students with disabilities will be reported to their parents at least as often as progress of non-disabled students is reported to parents.

IEPs will be reviewed, at a minimum, annually to determine progress and achievement of the student's goals. IEPs will be revised to address any lack of progress, recent evaluation results, additional information about the student, and anticipated needs.

### (4) Related Services

Students will receive all services as outlined in their IEP. Services, which cannot be provided by existing school staff, will be contracted for with outside providers such as speech/language services, occupational therapy, and physical therapy.

## **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) Academic Goals

In order to meet the School mission of building a foundation for students' success in school, career, and in life, it is essential for students to demonstrate proficiency in academic skills. To that end, academic SMART goals aligned with our mission have been identified. The basis for the School goals is the Performance Composite of the local school district. This measure identifies the percentage of students who are proficient on all end-of-grade and end-of-course tests combined. Our School will meet the performance of the district in Year 1 and will demonstrate continuous improvement over the next 4 years of operation to exceed district

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performance.

The Performance Composite for Forsyth County Schools for school year 2012-13 was 42.8%. With this as the baseline, the proposed School goals are:  
Year 1, 44% of students will demonstrate academic proficiency.  
Year 2, 49% of students will demonstrate academic proficiency.  
Year 3, 54% of students will demonstrate academic proficiency.  
Year 4, 59% of students will demonstrate academic proficiency.  
Year 5, 64% of students will demonstrate academic proficiency.

Students in K-2 will demonstrate proficiency as measured by Discovery Education Assessments (DEA). Students in grades 3-8 will demonstrate proficiency as measured by state assessments.

## (2) Operations, Finance, Governance, and Communication Goals

Operations, Finance, Governance, and Communication goals have also been identified for the first 5 years of operation. The proposed goals are intended to support implementation of the School's mission and meet the needs of the target population.

Operations: All required School reports will be submitted in full by required deadlines.

Finance: The School will have clean annual audit reports with no more than 2 findings and any previous year's findings corrected.

Governance: The Board will provide public notice and meet regularly in compliance with state requirements and the Board's bylaws.

Communication with the Board and Stakeholders: Information will be shared with stakeholders through regular school reports from the Director detailing progress made to the Board, Authorizer, School leadership team, and EMO; an annual report to the State Board of Education; and access to the READY Accountability results online by all stakeholders. The School will communicate weekly with parents. (See Sample newsletter in Appendix U2.)

## (2) Assessment Tools

A variety of assessments in addition to state mandated tests will be used to help inform instruction, evaluate student and School performance, and improve the curriculum. These assessments have been selected to provide reliable and valid data to teachers in a timely manner that will support effective instruction without being overly time consuming. The School Director and staff will maintain awareness of commercially available assessments and select those that will best meet the needs of the faculty in providing effective instruction.

Formative assessments will provide snapshots of student performance. Teachers will be able to immediately adjust instruction to improve academic outcomes for whole classes, small groups, and individual students. Teachers will use quizzes, tests, and classroom-based assessments to improve instruction, and provide students with feedback to help them reflect on their current standing and needs to meet expected goals. In addition, assessments in our core curriculum resources will be used to track and monitor student progress weekly, and determine areas of extension and remediation needed on an individual and group level.

The School will utilize Discovery Educational Assessments (DEA) to measure and demonstrate academic growth and achievement for all students in



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Reading/Language Arts, Mathematics, and Science. Students will be assessed 2 times with DEA during the year for formative measures of progress and at the end of each school year for summative data. By using DEA, educators will have immediate access to information including percentile rank, achievement score, projected proficiency on state tests, and growth for each student from year to year. Many DEA reports automatically analyze data, providing information at the individual, classroom, and school levels.

The School will use a variety of summative evaluation techniques and instruments including state assessments; and end-of-chapter and end-of-unit tests in Reading, Math, Science, Social Studies, and Writing. Rubrics will be utilized to assess completion and quality of all projects in which students participate. This will assure that the students are meeting the projected goals of the projects based on the State Standards.

The School staff will utilize data in decision making, and teachers will be selected and evaluated, in part, on their abilities to use formal and informal assessment results to make appropriate educational decisions. Monthly Data Chats will be held to ensure data and student progress are fully understood, and instructional practices and interventions are being implemented with fidelity. This comprehensive assessment system is in place to provide continuous and accurate information about students' abilities, progress, and needs in order to drive effective instruction.

### (3) Promotion and Exit

The School will establish placement and promotion standards that are based on high expectations and provide clear criteria for promotion from one level to the next.

Upon a student's entry into the School, it is the responsibility of the School Director to determine proper grade placement. Grade placement will be contingent upon verification of records. No student may be assigned to a grade level based solely on age or other factors that constitute social promotion or administrative placement. No student may be retained solely on the basis of standardized assessments.

Students shall meet the appropriate performance levels for North Carolina READY End-of-Grade Assessments (EOG) including English Language Arts/Reading and Math for grades 3-8 and Science for grades 5 and 8. Various indicators including, but not limited to, multiple measures using appropriate grade level assessments, as well as teacher judgment, will be used to determine performance levels. The teacher must provide compelling, verifiable evidence when student performance on appropriate grade level assessments is not believed to be indicative of daily classroom performance. Teacher judgment factors may include, but are not limited to the following: previous retentions; level of text at which student is independently successful, observations, checklists, student portfolios, classroom assessments, and/or current grades/marks.

The School Based Leadership Team will meet throughout the school year to monitor student progress and ensure proper interventions and supports are in place to support successful student promotion and exit.

### **Student Conduct:**

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*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.*

(1) Effective Discipline

A nurturing and collaborative School environment focused on effort, motivation, and academics where all students will feel safe, respect will be the norm, and academics will be the focus. By providing an engaging curriculum, and hands-on, project-based learning experiences, the number of behavioral issues that exist at many schools will be significantly reduced.

The School will follow the Positive Behavior Intervention and Support (PBIS) process. The PBIS process results in the creation of effective intervention plans that will impede problem behaviors, teach new skills, and create support systems for the student.

The School intends to implement a progressive discipline policy. If students are not in compliance with the school-wide expectations, the teacher will implement classroom consequences and communicate with the student's parent(s). If a student is not responding to the classroom consequences, a contract with a plan of action may be implemented.

(2) Offenses

Students may be suspended from School for offenses that include but are not limited to:

Fighting or other dangerous and/or disruptive behavior

Harassment/Bullying

Smoking or possession of tobacco products

Being under the influence or possession of alcoholic beverages or intoxicants of any kind

Defacing or vandalism of school property

Igniting any flammable substance or possession of products such as lighters

Theft

Actions deemed to be unsafe or containing the potential to disrupt the educational setting

Dismissal will be a last resort after numerous attempts to re-direct student behavior have failed. The School will have a zero-tolerance policy for circumstances involving drugs, weapons, or violence. These situations may result in dismissal or expulsion.

(3) Students with Disabilities

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Consistent with the School's Code of Student Conduct and to the extent that removal would be applied to students without disabilities, students with a disability (SWD) may be removed from their current placement for no more than 10 consecutive school days. A school is not required to provide services to a SWD during short-term removals totaling 10 school days or less in a school year if services are not provided to students without disabilities during such removals.

A change in placement will occur when a removal is for more than 10 consecutive school days; or a series of removals constitute a pattern because the removals cumulate to more than 10 school days in a school year, and, because of factors such as the length of each removal, the total amount of time the student is removed, and the proximity of the removals to one another. A manifestation determination will be made any time disciplinary procedures result in a change of placement for a student with a disability.

#### (4) Due Process

For long-term removals of a SWD:

1. Parents will be notified immediately of the removal decision and given the notice of procedural safeguards.
2. An IEP meeting will be held within 10 school days after the removal decision to conduct a manifestation determination.
3. Services will be provided to enable the student to appropriately progress in the general curriculum and advance toward achieving the goals in the student's IEP.
4. IEP team will develop a functional behavioral assessment (FBA) and implement a positive behavior intervention plan (PBIP).
5. Beginning on the 11th cumulative school day of removal, a free appropriate public education (FAPE) will be provided.

The School has a grievance policy to address disputes between the School and parents, students, or others. In summary, the individual should follow the steps below:

\*Meet with the appropriate school educator or employee to discuss the concern.

\*Seek resolution through the School's Director.

\*Appeal to the Executive Director (ED) of the EMO.

\*Appeal to the Board of Directors within 5 days of ED meeting.

The decision of the Board regarding the concern is final.

<b>Section III: Education Plan</b>		
<b>Concerns and Additional Questions</b>		
Do DEA assessments align with PBL? No discussion of the applicability of DEA to PBL. Given the nature of PBL, one could assume there would be rubric/portfolio assessment tools.  I'm not a PBL expert, but is it typical to have so many off-the-shelf curriculum choices when planning to implement PBL? My assumption was that PBL was more interdisciplinary and teacher-developed than what is typically included in established curricula.  What is the documented evidence (I don't see any cited) that this approach will lead to increased performance?	Paige Hirsch	Instructiona
PBL documentation? How does DEA interface with PBL. Are they compatible or complimentary?	Kevin Piacenza	Instructiona
Instructional program and methods sections do not include enough detail.	Mary Carmichael	Instructiona
How does the Discovery Educational Assessments align with Project Based Learning? How will teaching and learning be assessed with Project Based Learning? The school's targeted population states that "the School's population will reflect the racial and ethnic composition of the school district". According to the 2012-2013 Free and Reduced Meals Application Data provided on the DPI website, 56.55% of students in Winston Salem/Forsyth County Schools qualify for Free and Reduced Lunch. It is unclear given the information how the research supports project based learning for the proposed population.	Robin Kendall	Instructiona
Scope and Sequence is directly taken from math curriculum. Would be more valuable to see a scope and sequence that addresses the proposed PBL, generated by the petitioners. Has one been created?	Paige Hirsch	Curriculum a
How are the texts provided aligned with PBL? How is the curriculum framework concentrated to support the targeted student population? The provided scope and sequence has been taken directly from a math curriculum. The schools plan for transitioning students from grade to grade and to the next grade span upon program completion is unclear. What role does the DEA assessment have in promotion? Will all students be advanced to the next grade level no matter their DEA assessment?	Robin Kendall	Curriculum a
Curriculum framework and sound plan for educating students is lacking. Appendix B does not include additional support in these areas thought does map out Math scope and sequence.	Mary Carmichael	Curriculum a
The applicant writes that "RTI will be implemented based on the recommendations and technical assistance information available from NCDPI". The RTI process should be in place at the time the application is submitted so that the school can support all students from Day 1. The school will identify students "who are not performing at expected levels: ensuring continued progress and academic growth," what is an expected level? How will students be identified? Who is on the ELL Committee? The State Board of Education policy is written out word for word in certain sections, how is the applicant going to actualize the policy?	Robin Kendall	Special Prog
How will students not performing at grade level be identified? What metrics will be used to determine who qualifies for intervention services? Who will deliver Tiers 2 and 3?  What kind of training will teachers receive to prepare them to work with ELLs?	Paige Hirsch	Special Prog
Who is 504 coordinator?	Kevin Piacenza	Exceptional
How will students with IEPs access the core, PBL curriculum? What "alternative resources" will ensure this? Will the EC teacher also collaborate with the general ed teacher? Will the EC teacher push-in or will all service be pull-out? Given the focus on PBL, one could assume that it would be problematic for kids with IEPs to be pulled out of the classroom at critical project times.	Paige Hirsch	Exceptional
Will one EC teacher be able to adequately serve a student body of 390? 39 EC students estimated in budget projection.	Kevin Piacenza	Exceptional
The 60 day timeline cited in the discussion regarding the initial referral is the federal timeline. North Carolina has a different timeline which must be followed. I have a	Marie Massengill	Exceptional

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concern that "notification of concern" is being confused with referral. These are different and require different responses. It is concerning that the continuum of service options, while noted as not limited to the mentioned placements, includes homebound/hospitalized but does not mention separate. Note that the determination as to when and if an EC students works directly with the EC teacher either one to one or in small groups is only decided by the IEP team and is a part of the student's LRE. The statement is very general. There needs to be clear understanding that if a student is not being success with servies in the general classroom setting, the decision to remove him/her for service to be delivered in another setting or even in one on one w/the EC teacher in the reg. ed classroom can only be made by an IEP team and an amendment to the student's IEP. I am confused by the statement that the school will accept all elig. students who reside in the school district. What is ment by eligible and is there defined district for charters?(Support for FAPE section)		
In regards to FAPE the application writes "The school will accept all eligible students who reside in the school district" what happens if a students apply from outside of the district?	Robin Kendall	Exceptional
There is only one student performance standard and it is the same one used in the Mission section. The application resource manual provides guidance that has not been reflected here. The following is from the manual:  The responses in this section should include clear and measurable educational goals and objectives that set high standards for student performance for each grade level. These goals should expound upon the overall academic goal in the Mission and Purposes section of the application.	Mary Carmichael	Student Perf
The responses to the student performance standards for the school as a whole is a copy past e of the goals from question two in the mission, purpose, and goals section. The responses for operations, finance and governance are not specific and are expectations for all charter schools in North Carolina based on state law, they are not SMART goals. How is PBL included in evaluation of students? The promotion and exit standards and policies are unclear.	Robin Kendall	Student Perf
As stated before, why is the Year 1 baseline so low, given the GCS performance is only .8 below the proposed 44%? Why no individual growth metrics, given the use of the DEA? Why are there no metrics for non-cognitive skills that are vitally important for students, in addition to academic skills?  One operations goal seems inadequate	Paige Hirsch	Student Perf
Handbook states, "Piedmont Preparatory Academy may develop policies to further define expectations of students. Some of these policies may include..." It is unclear why the school "may" develop policies and has not done so already, or at least definitively states it will do so.	Paige Hirsch	Student Cond
Handbook states that parents are required to volunteer one hour a month. Discipline policies are not fully developed specifically the handbook says that the school "policies may include [a] 1. process for dealing with put-downs, threats, gossip, exclusion, victimization 2. Process for dealing with Chronically Disruptive Students". The process for dealing with these situations needs to be explained in the handbook and should already be established.	Robin Kendall	Student Cond
Same as Piedmont Prep.	Kevin Piacenza	Student Cond
While it is the school's decision to use an IEP team to conduct the Manifestation Determination Review, it is not the required team composition. It is also at the discretion of the school to conduct an FBA and develop a BIP for each student whose removals constitute a disciplinary change in placement, it is only required for those whose MDR team determine that the behavior in question is a manifestation of the student's disability.	Marie Massengill	Student Cond

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Robin Kendall	Fail
Becky Taylor	

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Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Paige Hirsch	Fail
Marie Massengill	
Alex Quigley	
Sherry Reeves	
Mary Carmichael	Fail
Tammi Sutton	
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	
Kevin Piacenza	Pass

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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:* Triad Education Organization

*Mailing Address:* c/o Dave Edwards

*City/State/Zip:* Hampstead NC 28443

*Street Address:* 124 Castle Bay Drive

*Phone:* 252-268-2111

*Fax:*

*Name of registered agent and address:* Julie Ayers

LB&A Certified Public Accountants

212 Matthews Street, Suite 102

Matthews, NC 28105

*FEDERAL TAX ID:*

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

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

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

X No

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

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

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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>	<b>Past or Present Professional Licenses(s) Held</b>	<b>Has any disciplinary action been taken against any of these</b>
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					<b>professional licenses?</b>
Meko Lawsom	Member	FORSYTH	Market Readiness & Employment Coordinator		
Nadia Rauber-Moe	Sec/Treasurer	FORSYTH	VP Development		
Thomas Cornejo	Vice Chair	FORSYTH	COO General Stability		
Ashley Jobe	Chair	FORSYTH	Founder Fresh Ash Designs		
Ronald Palm	Member	GUILFORD	President: Insurance & Financial Services of NC		

**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.*

(1) Board Duties

The Board of Directors will ensure that the School abides by the North Carolina state law for Charter Schools (GS115C-238.29) and be legally responsible for all transactions of the School. The Board will select, supervise, and evaluate the School Director and partner organizations, including the Education Management Organization (EMO); monitor School performance; and hold the Director and partner organizations accountable for achievement of the School's mission and goals. The Board will formally approve personnel decisions through majority vote and record those decisions in Board minutes.

The Board will annually adopt and maintain a balanced operating budget and exercise oversight over the School's operation including, but not limited to supervising audits and business practices, and handling complaints concerning the operation of the School. Board members shall review the School's financial statements monthly. It shall be the Board's responsibility for ensuring retention of a certified public accountant (CPA) or auditor for the annual financial audit, reviewing and approving the audit report, including audit findings and recommendations for the financial recovery plan, and monitoring a financial recovery plan in order to ensure compliance.

The Board will develop, review, or approve all policies related to the operation of the School. The Board also will assess the School, the educational program's successes, and areas in need of improvement. The Board may be involved in analyzing alternatives and additions to the program by



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analyzing student and School performance data, thereby making data-driven decisions on behalf of the students. By incorporating such scrutiny, the Board will ensure that the School will continue to consistently and effectively serve our student population.

## (2) Lead Administrator

We know that the leader of the School is absolutely critical in the School's ultimate success. The School will use multiple sources to attract interest and resumes from viable candidates for the position as the School's leader. Sources may include, but are not limited to Teachers-Teachers.com, newspapers, national publications like Education Week, as well as connections through board members and other community members.

The school leader will have a minimum of a master's degree in education, prior experience as a teacher and school administrator, and a strong business understanding. Ideally, the candidate will also have prior experiences with setting and managing budgets, and communicating with diverse populations; and strong understanding of curriculum, instruction, assessment, special needs populations, and the implementation of project-based, thematic learning.

Once resumes are received, a team consisting of one or more Board members and EMO staff will review resumes and narrow the number of candidates. Phone interviews will be scheduled and held. Top ranked candidates will be vetted by checking references, confirming resume details, and investigating the candidate through social media. Top candidates will be invited for an in person interview. The team will make a recommendation for the top 1-2 candidates to be interviewed by the entire Board. A conditional offer/no-offer decision will be based upon this interview. Upon the candidate's acceptance, various employment papers will be completed and appropriate reference and criminal background checks will be executed immediately. Finally, the Board will make a final employment offer and negotiate a compensation package.

The School will comply with the following Equal Employment Opportunity policy statement: The laws of the United States and the State of North Carolina guarantee equal employment opportunity for all persons, regardless of race, gender, age, religion, national origin, or disability, and provide equal treatment opportunity in all aspects of employment including working conditions, pay, benefits, and advancement.

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.*

### 1) Size and Composition

The Board of Directors will consist of an odd number of individuals, preferably numbering 7, but no fewer than 5. While we do not have a full board at the time of this application submission, we are continuing to seek strong board members who can bring additional expertise. Each member will serve for staggered 3-year terms.

As positions become available, new members for the Board will preferably: a)

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be a resident of the School's greater geographical area; b) show passion for the education of today's youth, especially the School's targeted student population, and the School's mission and educational program design; c) add to the variety of professions/occupations represented by the existing Board composition, broadening the expertise of the group corporately; and d) create a cross-section of diverse professions/occupations representative of the community.

## 2) Powers and Duties

Board powers and duties have been detailed above and include:

selecting, supervising, and evaluating the Director and partner organizations and holding them accountable for achievement of the School's mission and goals

approving personnel decisions

adopting and maintaining a balanced operating budget

reviewing financial statements monthly

retaining an auditor for the annual financial audit, reviewing and approving the audit report, and monitoring a financial recovery plan

developing, reviewing, or approving all School policies

assessing the School and the educational program

## 3) Board Composition and Expertise

The founding Board represents the local community and has diverse experiences within marketing, business development, personnel, technology, sociology, insurance, and other backgrounds which may prove helpful in the organization of the corporation. Additional board members will be recruited to ensure that key stakeholders with skills and strengths not currently found within the Board will be represented.

## 4) Ensuring Success

The Board will hold the School Director and partner organizations accountable for the achievement of the School's mission and goals. Through the annual Director evaluation process, regular review of student assessment results, and tight fiscal controls, the Board will ensure that the School will continue to consistently and effectively serve our student population in achievement of the School's mission and goals.

## 5) Evaluating the Leader

The School Director will be evaluated on the 8 Standards of Executive Leadership (Strategic, Instructional, Cultural, Human Resource, Managerial, External Development Micro-Political, and Academic Achievement) using the NC rubric for self-assessment and the Summary Evaluation Rating Form. A performance rating for the Director will be established: Developing, Proficient, Accomplished, Distinguished, or Not Demonstrated.

The Board (or a Board committee) will be responsible for the leader. Leader evaluation will comply with NC requirements and include the following process:

\*Orientation to the process

\*Self-assessment using the NC Principal Evaluation Rubric

\*Discussion of self-assessment results with the Chair or designee, development of performance goals, and determination of evidence to be gathered

\*Data collection

\*Mid-year evaluation to discuss progress towards meeting the performance

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goals

\*Completion of a consolidated performance report by the Director that will provide a comprehensive overview of annual performance

\*Completion of the Principal Summary Evaluation Rating Form by the Chair or designee

\*Discussion of self-assessment results, performance report, and Chair's summary report

\*Agreement on a Professional Growth Plan

## 6) Representation

As stated above, active and effective representation of key stakeholders from within the community will be a priority. Ideally, board members will be local residents and support diversity of knowledge, experience, and demographics on the Board.

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

The idea for the School was generated during a conversation between David Edwards and David Ayers, regarding high-quality educational choices for students in the Greensboro and Winston-Salem areas. During this conversation, it was decided that David Ayers would sit on the board and David Edwards would work to find resources for the School. Both David Ayers and David Edwards have spoken with numerous community members regarding the proposed school and several expressed interest in serving the school, including serving on the board.

Once a group of prospective board members was identified, the board met to start the process of incorporating the school, and completing the charter application.

In the event of the death, resignation, retirement, removal, or disqualification of a member of the Board of Directors during their appointed term of office, their successor shall be elected and serve only until the expiration of the term of their predecessor provided, however, any Parent Director vacancy must be filled by a parent of a student enrolled in the School. The Board of Directors shall have the power to temporarily fill, at its discretion, vacancies occurring on the Board of Directors by appointment.

In the event the Board of Directors has appointed a nominating committee to act, such committee shall present a slate of candidates for each office to be filled at least thirty (30) days prior to the Annual Meeting. Other candidates may be nominated by the Board of Directors from the floor to be added to those selected by the Nominating Committee provided that the nominee's willingness to serve has been determined in advance of the nomination.

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

The board will meet at least once per quarter.

### 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).*

## (1) Orientation

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The Board will comply with state planning year requirements (TCS-U-013) for new charter schools, including participation in regular meetings with staff from the NCDPI Office of Charter Schools. These meetings will address such topics as school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator.

At the beginning of their term, all new board members will be provided with an orientation by the School's Board Chair, accountant, and attorney specific to the mission, philosophy, educational model, bylaws, finances, charter contract, management agreement, current initiatives and issues of the School, conflicts of interest, ethics, and Open Meetings law requirements.

## (2) Ongoing Development

All Board members will be required to participate in on-going professional development that will take place at each regularly scheduled board meeting. Topics may include, but are not limited to, the following: state assessments and reporting requirements; funding, funding changes, and budget implications; fiscal planning; legal requirements for charter schools; legislative updates; and understanding student assessment results.

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.*

The Board will adopt a Code of Ethics. The purpose of the Code of Ethics is to promote the honest and ethical conduct of the directors, officers, and employees of the Corporation, including: i) the ethical handling of actual or apparent conflicts of interest between personal and professional relationships; ii) full, fair, accurate, timely, and understandable disclosure in periodic reports required to be filed by the Corporation; iii) compliance with all applicable governmental rules and regulations; iv) prompt internal reporting of violations of this Code of Ethics; and, v) accountability for adherence to the Code of Ethics. The Code of Ethics is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to non-profit and charitable corporations and charter schools.

Conflict of interest exists when the personal or professional concerns of a board member or a staff member affect his or her ability to put the welfare of the organization before personal benefit. Board members will not participate in any discussions or vote on matters that would affect the transactions between the organization and another party that would benefit them or their personal/professional affiliations. Staff members who have an actual or potential conflict will not be involved in decision-making affecting such transactions. Conflict of Interest is detailed in Article IX of the Board Bylaws provided in Appendix H.

Directors shall avoid improper conduct arising from conflicts of interest and shall abide by all legal requirements governing conflicts of interests, including G.S. 55A-8-31. If any Director has or may have a conflict of interest in a matter pending before the Board, such member shall fully disclose to the Board the nature of the conflict or potential conflict. No transaction may be approved if it would constitute self-dealing.

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Each director, officer and employee shall at the time of election, appointment, or employment, and annually thereafter, sign a statement which affirms that such person has received, read, understands, and will comply with the School's Code of Ethics.

There are no existing relationships that could pose actual or perceived conflicts if the application is approved.

If the board or committee has reasonable cause to believe that a person has failed to disclose actual or possible conflicts of interest or has violated policy, the person shall be informed of the basis for such belief and afforded an opportunity to explain the alleged violation or failure to disclose. If, after hearing the response of the person and making such further investigation as may be warranted in the circumstances, the board or committee determines that the person has failed to disclose an actual or possible conflict of interest or has violated policy, appropriate disciplinary and corrective action shall be taken.

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

The Board will rely on assistance and input from various professionals and stakeholders to develop school policies. Some of these groups may include EMO staff, legal counsel, accountants, School administrators and faculty, the PTO, parents, and other stakeholders. The board will also review objective data from appropriate sources to develop school policies. Some examples of these data may include parent satisfaction surveys, financial reports, academic performance reports, and similar sources.

While the Board will consider multiple data points in their decision-making process, they will keep the School's interests at the center of this discussion. They will always act and develop policies that support the mission of the School, protect students, and ensure the public trust.

*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.*

The School expects to establish a Parent Teacher Organization (PTO) if sufficient interest is expressed. While PTOs are separate organizations from the school, it is expected that the PTO will work in collaboration with the School Director to support the needs of the School. This may include, but is not limited to organizing volunteers, raising funds for additional classroom resources and field trips, organizing parent education events, and disseminating news and information.

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

The School will have a dispute resolution policy approved by the Board to address grievances between the School and parents, students, or others.

1. Any person with a complaint, including staff members, parents, students, or others, should first visit with the appropriate school educator or employee to discuss the perceived problem or concern in an effort to seek a satisfactory resolution.

2. If a satisfactory resolution cannot be reached, or if, for significant reasons, the individual feels they cannot meet with the appropriate school educator or employee, the individual can seek resolution through the School's Director.

3. If the dispute or concern cannot be resolved satisfactorily with the School's Director, the individual may appeal to the Executive Director of

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the EMO.

4. If the dispute or concern cannot be resolved satisfactorily with the Executive Director, the individual may appeal to the Board of Directors. Any appeals to the Board will be sent to the Board Chairman in writing within 5 days of meeting with the Executive Director. The written appeal may be sent via email, regular mail, or fax. The Board Chairman will review the appeal and may meet formally or informally with the individual to gather more information. If the dispute can be resolved within the Board's existing policies, the Board Chairman may resolve the dispute. If the dispute has merit and is outside of existing policies, the Board Chairman may present the issue at the next regularly scheduled board meeting. The decision of the Board regarding the dispute or concern is final, provided that the dispute or concern does not involve matters related to an individual's protected liberty or property rights.

5. If no appeal is received by the Board Chairman within 5 days, the Executive Director's decision is final.

### 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).

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

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

**Not Applicable**

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

Name of the Company: Newpoint Education Partners  
Address: 21810 U.S. Highway 19 North  
Clearwater FL 33765  
Website: [www.newpointeducation.com](http://www.newpointeducation.com)  
Phone Number: 727-475-1256  
Contact Person: David Stiles  
Fax: 727-725-3395

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Email: David.Stiles@newpointeducation.com

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

The Board understands that opening and operating a high quality charter school requires a broad base of knowledge and skill in very diverse areas, such as education, finance, policy, facilities acquisition and management, human resources, and marketing. Nationally, charter schools enter into agreements with education service providers in order to increase capacity and access a variety of resources (Lowe and Lin, 2006). The School intends to enter into agreements with several service providers who specialize in areas critical to the success of the School and for which the School cannot provide the same depth of expertise and same level of service internally. These agreements will enhance our capacity and ensure access to professional expertise and fidelity to the School's mission.

The Board intends to contract with Newpoint Education Partners, LLC, for school management services. Newpoint is an education solutions company whose leadership team has extensive experience in the design, launch, and successful operations of charter schools in 12 states and whose leadership has provided educational and strategic consulting to public, private, parochial and charter schools.

Other service providers will include:

LB&A, Certified Public Accountants, PLLC in cooperation with North Carolina Public Charter Schools Association for full service accounting services, including GAAP compilations, monthly bank reconciliations, and monthly financial statement preparation for Board members.

School Financial Services, Inc. (SFS), an experienced charter school specialist accounting firm, to provide Human Resources services including payroll and benefits.

EMG Interactive, a successful vendor with expertise in charter school marketing and media development. Their services include brand development, images, logos, websites, collateral materials, blogs, print campaigns, and video production.

David Hotstetler, an attorney with Lex-Is Services, has been retained as Board Counsel.

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

Careful consideration and due diligence was given to three educational management organizations: Edison Learning, Charter Schools USA, and Newpoint Education Partners. Edison Learning did not focus on a K-8 model that aligned with the Board's school vision. Charter Schools USA was focusing their efforts on other parts of North Carolina and did not have the capacity to assist our school.

One or more members of the board have established a strong understanding of

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the capabilities of the leadership team of the selected EMO and the character of key members of the Newpoint leadership team. This has been a key element to evaluating each provider.

Prior to selecting Newpoint as the EMO, due diligence was conducted in the following areas:

- \* The board interviewed Newpoint staff members and leadership.
- \* The board reviewed the academic performance data from Newpoint's other schools.
- \* Board members visited a school managed by Newpoint.
- \* The board reviewed the audit reports from schools managed by Newpoint. (Student performance data are included in Appendix U3.)

The Board believes that Newpoint is the best fit for the School's EMO with the strongest capacity to ensure attainment of the School's mission and high student achievement.

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

Newpoint is a good fit for the targeted student population because their educational approach aligns with the vision of our board. This EMO believes that students of today and tomorrow need a different skill set to achieve success in the 21st Century, which matches the beliefs of the Board. The next generation workplace will require skills in creativity, problem solving, collaboration, and application of different types of analyses and technologies to current and future problems. Students attending a school managed by Newpoint can expect a high-quality educational environment with caring, nurturing teachers who will challenge each student to reach their full potential academically and personally.

Newpoint Education Partners has a strong history of success as an education management organization. Student academic achievement at schools managed by Newpoint exceeds the performance of students at other schools in the same geographic area of the school district. Detailed student achievement results are included in Appendix U3. We are confident that similar results can be obtained at our proposed school.

In addition, all of the schools currently managed by Newpoint have been audited by a local independent auditing firm. Each 2013 audit report indicates no findings, as can be seen in the sample Auditor's Report Letter in Appendix U4.

The highest performing school of the EMO/CMO is Newpoint Pensacola High School, located in Pensacola, Florida. All public schools in Florida are graded on an A-F scale. These school grades reflect eight assessment-based measures of achievement that are balanced between components that measure current-year performance (e.g., proficiency in reading, math, science and writing) and components that measure progress (e.g., learning gains in reading and math). Schools are also evaluated on the percent of eligible students tested and the progress of the lowest 25% of students in reading and math.



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Newpoint Pensacola High School has been an A rated school for each year of its existence. Newpoint Pensacola High School's success can be attributed to a number of factors. The Director has been in the leadership position for the majority of the school's existence. His leadership and experience contribute to a stable environment, which is very conducive to learning and achievement. Because of his leadership, there is low staff turnover, and students, parents, and staff have clear expectations regarding the School's focus on academic excellence. In addition, parents are very supportive of the School and contribute their time and energy toward their children's success and the overall School's success.

The lowest performing school of the EMO/CMO is Newpoint Pinellas Academy (middle school) located in Clearwater, Florida. Newpoint Pinellas was rated an F school last year. There are two primary reasons for the low performance of this school. One reason is that it was a first year school in 2013-2014. Many times, depending on the student population, first year schools may struggle with academic success because the school rating in the first year is really reflective of the students' experiences and learning prior to coming to the new school. If students arrive with academic deficiencies, it can often take more than one year to remediate students and improve their academic performance. Secondly, Newpoint Pinellas experienced a high staff turnover during the first year of operation. During the course of the year, several teachers left the school for a variety of reasons, many of which were personal. This inconsistency among the staff is not ideal for achieving high academic performance. In addition, it was determined that the Director selected for the school was an ineffective instructional leader. This Director was removed from the position and replaced.

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

The governance structure is established in the bylaws and will not be affected by the EMO.

The governing board will ensure that an "arm's length," performance-based relationship exists between the governing board and the service providers. The School intends to use the following measures to establish and maintain such an "arm's length" relationship:

1. An independent CPA/audit firm that specializes in charter school accounting and auditing and which is unaffiliated with the accounting firm or the EMO will conduct the annual audit.
2. A separate accounting firm will provide all accounting, bookkeeping, check writing, and cash management activities on behalf of the School. LB&A, Certified Public Accountants, PLLC in cooperation with North Carolina Public Charter Schools Association is an experienced charter school accounting firm and is unrelated to the auditing firm and the EMO.
3. An independent EMO with separate agreements and responsibilities from those of the accounting firm or auditing firm will provide educational management services. EMO staff at the school will not issue checks or handle cash with the exception of lunch, clubs, uniforms, or petty cash related items.
4. Outside legal counsel with expertise in charter school matters and similar contractual relationships has been retained.
5. Finally, proper governance of the School will include regular board meetings, financial reporting and review at every board meeting, a complete

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operational review at every board meeting, and visits to the School on a regular basis.

The Board will ensure that the EMO performs its duties as described in the management agreement and the charter contract. If the EMO fails to meet the academic performance guidelines described in the charter contract, misuses public funds, endangers students, or violates the agreement in any other way, the Board has the ability, and duty, to terminate the management agreement.

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

All employees will be employees of the Board. The Board has contracted with and will oversee Newpoint and, with Newpoint, will oversee the School Director. The School Director will be an employee of the EMO and will interview and recommend staff for hiring approval by the Board. The Director will serve as the educational leader, and supervise, direct, and evaluate staff employed at the School site.

The School Director will be responsible for executing and administering the policies of the School as set by the Board. This includes, but is not limited to:

\*Supervising the preparation and administration of the annual budget as approved by the Board

\*Regular reporting to the Board

\*Overseeing the external operations of the School, such as enrollment, fundraising, marketing, relations with the charter authorizer, and communication with the School's constituencies

\*Overseeing the curricular and co-curricular programs of the School, including focused effort on improving student achievement

\*Overseeing the academic and social progress of the students and responding to students' needs consistent with the School's philosophy and with applicable laws

\*Modeling the mission and philosophy of the School

\*Other duties as assigned

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

The management agreement with Newpoint Education is a performance-based contract. Newpoint is required to meet the academic goals, regulatory compliance areas, and financial goals described in this application and the charter contract. In addition to the requiring Newpoint to comply with all of the regulatory requirements and performance goals in the contract, Newpoint's agreement will be reviewed based on the following criteria.

In the 5th academic year of the Agreement, but reasonably in advance of the expiration of the 5th year of the Agreement term, the Board shall review the Company's performance in the following components and the contract shall automatically be renewed, provided that the Company's performance is satisfactory in three of these five components, including the Financial and Academic components (numbers 1 and 2 below).

1. Finance: The School will end the year with a budget surplus in each year of the Agreement

2. Academic Performance: By the 5th year of the Agreement, the School will show academic growth in two of the last three years of the Agreement.

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3. Enrollment: By the 5th academic year, the enrollment of the school will meet or exceed the targets established in the projected Year 5 annual budget.

4. Teacher - Student ratios: In each year of the Agreement, the School will be staffed at no more than a 22:1 ratio for students in grades K-5 and no more than a 25:1 ratio for students in grades 6-8.

5. Regulatory compliance: In each year of the Agreement the School shall be in substantial compliance with the Charter, or will be actively implementing a plan to reasonably cure any area of non-compliance.

While we believe that Newpoint will be able to meet all of these obligations, should they fail to meet them, the Board will be able to terminate the contract subject to the provisions outlined in the management agreement. The Board of Directors has used their attorney to negotiate the management agreement.

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

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

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

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

The EMO has not managed any schools in North Carolina over the last three years.

**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 positions anticipated for the School include:

School Director

Assistant Director

Classroom Teachers

Special Education Teachers

Resource Teachers (reading, art, music, and/or P.E.)

Instructional Aides

Secretary/Clerical

Custodian

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

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Include the following information for the proposed charter school:

(1) Recruitment

Once a Director is hired, he/she will begin the process of recruiting, interviewing, and recommend hiring teachers that share our educational vision to staff the School. As with any school, high quality, effective education begins with these teachers.

The majority of the staff will come from within the local community. As necessary, the School will use all traditional means of recruitment including newspaper, online ads, and professional recruiters.

(2) Retention

It is our desire to pay all regular employees wages and salaries that are competitive with other employers in the marketplace in a way that will be motivational, fair, and equitable. The Director will determine salary offers for initial employment based on each candidate's knowledge, experience, and evidence of success with the target student population and key elements of the educational model.

The School is committed to providing a comprehensive benefits program for all eligible employees. In addition to receiving an equitable salary and having an equal opportunity for professional development and advancement, employees may be eligible for other benefits that will enhance their job satisfaction.

A good benefits program will be a solid investment in employees. The School Director and Board, with assistance from Newpoint, will periodically review the benefits program, as described below, and make modifications as appropriate to the School's condition. The School reserves the right to modify the benefits offered.

Teachers will have a voice in School leadership through staff meetings, regularly scheduled committee meetings, and the School Advisory Council. When teachers are held accountable for their students' instruction and have the ability to make decisions in their students' best interest, phenomenal things are possible.

We believe that competitive salaries and comprehensive benefits combined with teacher empowerment will encourage staff retention.

- 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.*

All employees will be employees of the Board. The Board has contracted with and will oversee Newpoint and, with Newpoint, will oversee the School Director. Other school employees will not have a direct relationship with the Board. The School Director will interview and recommend staff for hiring approval by the Board. The Director will be responsible for daily operations at the School and will serve as the educational leader, and supervise and evaluate staff employed at the School site

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

As of the date of this application, no teachers have been hired. That

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notwithstanding, once a Director is hired, he/she will begin the process of recruiting, interviewing, and recommend staff for hiring approval by the Board that share our educational vision to staff the School. As with any school, high quality, effective education begins with these teachers.

We believe that the majority of the staff will come from within the local community. As necessary, the School will use all traditional means of recruitment including newspaper, online ads, and professional recruiters.

After narrowing the number of candidates based on initial application information, interviews will be scheduled and held. A conditional offer/no-offer decision will usually be based upon this interview. Upon the candidate's acceptance of the conditional offer, various employment papers will need to be completed and the appropriate reference and criminal background checks will be executed immediately. The Director will monitor these on a continuous basis. All employment will be in accordance with the laws of the United States and the State of North Carolina, which guarantee equal employment opportunity for all persons, regardless of race, gender, age, religion, national origin, or disability, and provide equal treatment opportunity in all aspects of employment including working conditions, pay, benefits, and advancement.

Dismissal or termination is discussed below.

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

It is our desire to pay all regular employees salaries that are competitive in the local marketplace in a way that will be motivational, fair, and equitable. The School will comply with the requirement for full disclosure of salary ranges in compliance with NC Open Records Law. As referenced in the budget, the salary ranges are as follows:

School Director \$70,000 - 90,000  
Assistant Director \$45,000 - 65,000  
Classroom Teachers \$35,000 - 45,000  
Special Education Teachers \$35,000 - 45,000  
Resource Teachers \$35,000 - 45,000  
Instructional Aides \$18,000 - 24,000  
Secretary/Clerical \$24,000 - 32,000  
Custodian \$25,000 - 33,000

The School Director will determine salary offers for initial employment based on each candidate's knowledge, experience, and evidence of success with the target student population and key elements of the educational model. Compensation will vary with individual performance and in compliance with all applicable statutory requirements. The School will apply the same principles of fairness to all employees, regardless of organizational level, race, color, citizenship status, national origin, ancestry, gender, sexual orientation, age, religion, creed, physical or mental disability, marital status, veteran status, political affiliation, or any other factor protected by law.

Employee benefits will include:

Insurance Coverage

A comprehensive, quality insurance program will be provided to eligible

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employees in the areas of health, dental, and life insurance. Insurance will also be available to eligible family members.

#### Recognized Holidays

Regular full-time employees will be eligible for holiday pay. Recognized holidays include those school holidays, which are recognized by the public school district (according to the district calendar) in which the employee is employed with the Charter School. This does not include the summer holidays.

#### Sick Leave

Each full time employee may earn sick time at the end of each completed month of service.

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

##### (1) Grievance

The School will have a dispute resolution policy to address grievances between the School and parents, students, staff, or others, which has been detailed above. In summary,

1. Visit with the appropriate school employee to discuss the concern in an effort to seek a satisfactory resolution.
2. If a satisfactory resolution cannot be reached, the individual can seek resolution through the School's Director.
3. If the concern cannot be resolved satisfactorily with the School's Director, the individual may appeal to the Executive Director (ED) of the EMO.
4. If the concern cannot be resolved satisfactorily with the ED, the individual may appeal to the Board. Any appeals to the Board will be sent to the Board Chair in writing within 5 days of meeting with the ED. The decision of the Board is final, provided that the concern does not involve matters related to an individual's protected liberty or property rights.
5. If no appeal is received by the Board Chair within 5 days, the ED's decision is final.

##### (2) Termination

Employment with the School will be at will. Employment contracts will be issued for the purpose of specifying salary, position title, and duties. Employment dates will be included only as a convenience and will not bind either the employee or the School to a specific time period. The annual number of work days for employees will include a minimum of 185 instructional days, but may be adjusted by the School Director based on the needs of the School.

Employees will be free to terminate their employment with the School at any time, with or without reason. The School intends to provide its staff with the opportunity to respond to issues prior to action being taken by the Board. Likewise, the School will have the right to terminate the employee's employment, or otherwise discipline, transfer, or demote the employee at any time, with or without reason, provided it falls within the legal confines of the North Carolina wage and labor laws.

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

No positions will have dual responsibilities.

#### *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.*

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All teachers employed by the School will hold a Standard Professional 1 or 2 Professional Educator's License. Teachers for students with disabilities, ELL students and gifted students will be required to meet the following minimum qualifications: Bachelor's Degree in Elementary Education, Special Education (as appropriate), or similar; required license for EC, AIG, or ESOL; experience serving students in the target population to be taught; and positive work history.

The School will initially employ 1 full-time Exceptional Child (EC) teacher and is planning to add a second (part-time) EC teacher in year 2.

The School will hire appropriate staff certified in ELL/LEP and AIG based on the number and requisite needs of students. Additional staff may also be employed or contracted with to provide support as needed.

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).*

The School Director will hold a School Administrator-Principal's or Superintendent's license and have earned a Master's degree or higher. Job responsibilities have been detailed above, but include executing and administering School policies, interviewing and recommending staff for hiring approval by the Board, serving as the educational leader, and supervising and evaluating staff employed at the School site.

The Assistant Director (AD) will hold a School Administrator-Assistant Principal license and have earned a Master's degree or higher. The AD supports the Director and serves as Acting Director in his/her absence. The AD is responsible for the oversight of all teaching faculty, curriculum design and improvement, coordination of classroom activities with internship activities, teacher professional development, and teacher assignment in close cooperation with the Director.

All teachers employed by the School, including classroom teachers, EC teachers, and resource teachers (reading, art, music, and/or P.E.) will hold a Standard Professional 1 or 2 Professional Educator's License. Teachers will provide a learning environment that is team-oriented, student-centered, and aligned with the School's mission, goals, and educational program design. Teachers are responsible for designing and implementing instruction, overseeing and monitoring individual student progress and the use of resources and equipment, appropriately enforcing the School's Code of Conduct, etc.

Instructional Aides (paraprofessionals) must have an Associate's degree or higher or have completed 2 years (48 semester hours) of college coursework. Under the supervision of a classroom teacher, instructional aides will provide instructional assistance to students in need of academic support.

Qualifications for the Office Manager and Secretary will include Associate's Degree (Bachelor's Degree preferred), experience with managing complex tasks involving a variety of resources, and demonstrated ability to manage the details of multiple tasks. The Office Manager is responsible for modeling the appropriate image for the School; creating a welcoming environment for students, staff, parents, and visitors; human resources and benefits administration; bookkeeping and related tasks; and providing administrative

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assistance and general office support to the Director. The Secretary is responsible for answering telephones and all other communications in a professional manner, and directing the caller to the appropriate extension; appropriately greeting and directing visitors in a manner that is respectful and professional; maintaining awareness of the physical control of entry into the reception area; and secretarial duties as assigned.

The Custodian will have considerable knowledge of the methods, equipment, and supplies used in the cleaning and appearance of buildings, and will be responsible for the routine maintenance of buildings, grounds, and equipment.

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

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

The Director will be responsible as the School liaison to the licensure division at NCDPI for maintaining teacher licensure requirements and professional development.

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

#### (1) Mentoring

Mentor teachers will be assigned to any teacher who is in the first 3 years of teaching and holds a Standard Professional 1 License. Mentors will be selected who have evidence of success with our student population within the School's model. Mentors will be expected to provide logistical and emotional support, focus efforts on improving instruction and learning, and provide ongoing support and encouragement to their beginning teacher.

Time will be scheduled for mentors to observe their beginning teacher in the classroom, and for mentors and their beginning teacher to meet regularly. Model Classrooms will be identified within the School to allow the scheduling of observations and discussions between new teachers and their assigned Mentor Teacher.

#### (2) Retention

As discussed above, we believe that competitive salaries and a comprehensive benefits program combined with teacher empowerment that gives teachers a voice in the School leadership and administration will encourage staff retention.

#### (3) Evaluation

Teacher evaluation will align with the North Carolina Educator Evaluation System (NCEES). The intended purposes of the School's evaluation process is to assess the teacher's performance in relation to the North Carolina Professional Teaching Standards, and the School's mission and goals, and to design a plan for professional growth.

Teachers will be evaluated on their abilities to meet the following standards:

- \*Demonstrating Leadership
- \*Establishing a Respectful Environment for Diverse Student Populations
- \*Knowledge of Content



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- \*Facilitating Learning
- \*Reflecting on Practice
- \*Contributing to Student Academic Success

Evaluation will include the following process:

- \*Training/Orientation on the evaluation purposes, process, forms, and schedule
- \*Self-assessment using the Rubric for Evaluating NC Teachers
- \*Pre-Observation conference with the School Director to discuss the self-assessment, current professional growth plan, and the lesson to be observed
- \*Observation of at least 45 minutes or a full class period. Probationary teachers will be observed at least 3 times; career status teachers will be observed annually. During the year in which a career status teacher has a summative evaluation, the Director shall conduct at least 3 observations, including at least 1 formal observation.
- \*Post-observation conference within 10 school days of the formal observation to discuss and document on the Rubric the teacher's strengths and weaknesses as noted during the observation.
- \*Teachers collect artifacts as exemplars of their work, such as lesson plans, student work samples, and student achievement data.
- \*Summary Evaluation Conference to discuss the self-assessment, current professional growth plan, classroom observation results, and data/artifacts collected. During this conference, the Director will complete the Teacher Summary/End-of-Year Rating Form and discuss ratings with the teacher.
- \*Teachers who are rated at least Proficient on all the Standards will develop an Individual Growth Plan. Any teacher who is rated Developing on 1 or more standards will be placed on a Monitored Growth Plan. Any teacher who is rated Not Demonstrated on any standard will be placed on a Directed Growth Plan.

Beginning teachers must be rated "Proficient" on all 5 NC Professional Teaching Standards on the most recent Teacher Summary/End-of-Year Rating Form in order to be eligible for the Standard Professional 2 License. Probationary teachers must be rated as "Proficient" on all 5 NC Professional Teaching Standards on the most recent Teacher Summary/End-of-Year Rating Form before recommending that teacher for career status.

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.*

Professional learning will be connected to the specific performance data for the students to whom the teacher is assigned. Teachers and administrators will consider the academic progress of students in determining what professional learning is needed to increase student achievement.

Staff members may be asked to complete written survey instruments that address in-services/training that may be beneficial to them. In order to meet staff needs, the survey will have the respondents rate items on a Likert Scale. The items will include such things as project-based learning, collaborative teaching, behavior management, organizing groups for instruction, meeting the needs of EC and ELL/ESOL students, interpreting and using test data, using the School technology more effectively, working with parents/family members, inclusion, conflict resolution, ethics and professionalism, curriculum and instructional strategies, and final open

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sections for staff suggestions/comments.

A specifically tailored Professional Development program may be implemented utilizing the highest rated variables from the respondents' surveys. The methods of delivering the programs will include, but not be limited to large groups, small groups, individuals, and electronic functions such as development and training through computerized programs, video conferencing, and web-based delivery. The timeline will be to schedule staff development meetings at pre-School start-up times and then periodically throughout the school year. Staff will attend, as directed, per their position/perceived need.

The School plans to use Professional Learning Communities (PLC) as a component of the overall educational model and design. We believe that the collaboration, creativity, and sense of community in this model is how people learn best and is very similar to how the students will learn with Project Based Learning. Every teacher will be expected to participate in the PLC.

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.*

Prior to the initial year of operation, all staff will participate in 3 to 5 days of intensive training on the following topics:

- \* Differentiated Instruction
- \* Project Based Learning
- \* Technology Integration
- \* Higher-order competencies
- \* Literacy Instruction
- \* Data analysis to inform instruction
- \* Cooperative Learning
- \* Effective use of curriculum tools and resources, including assessments

In addition, all teachers will participate in an annual two-day professional development training at an "All Staff Retreat" prior to the beginning of the school year. Following this intense introduction to the education model, teachers will work together with their leadership team for school-specific pre-service training. A key component of the training will surround the instructional implementation of the education model in each grade level. Model Classroom videos will be viewed during the training to ensure teachers clearly understand how the model supports student learning and academic success.

A sample schedule of Professional Development prior to School starting may be as follows:

Day 1 & Day 2 All Staff Retreat:

Sample Agenda: Welcome Session Vision, Values, History and Goals  
Team Building Activity  
Keynote Address: Leadership in the Classroom  
Whole Group Presentation on Differentiated Instruction  
Break out Sessions  
-Differentiated Instruction

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- Teaching to the Left Brain and Right Brain
- Content areas/grade groups - Best Practice Sharing
- Curricular/Instructional tools and resources

Days 3-8 School based; School specific

Day 3 8:00-3:00 Training on Differentiated Instruction and Instructional Framework

Day 4 8:00-3:00 Project Based Learning Training

Day 5 8:00-11:00 Training on Technology Resources  
12:00-3:00 Training on integrating technology into classroom instruction

Day 6 8:00-11:00 Discovery Educational Assessments: training on system use  
12:00-3:00 - Discovery Educational Assessments: using data to inform instruction

Day 7 8:00-11:00 Training on Effective Cooperative Learning Strategies  
12:00-1:30 Training on incorporating higher-order competencies into instruction  
1:30-3:00 - Training on incorporating literacy instruction into all content areas

Day 8 8:00-3:00 Training on all curricular resources: electronic and print materials

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.

Teachers will report to work eleven days prior to the first day of school. Eight of these days will be used for professional development (64 hours), while the other three days will be for the teachers to prepare for the students to return to school.

During the school year, teachers will have five full days and six half days to devote to professional development (approximately 58 hours). In addition, professional development sessions will be held after school at least once per month for the months of September through May (minimum 9 hours).

The School's calendar will be designed to accommodate the days for professional development activities by scheduling non-students days into the instructional calendar (5 days). In addition, there are six Early Release days scheduled into the instructional calendar to allow for afternoon professional development activities for teachers on these days. The School will assure that the instructional calendar includes 185 of instruction for students as required.

Additionally, the daily schedule requires that teachers are on campus 30 minutes before students arrive and stay at least one hour beyond the end of the student day. A minimum of one day per week after school will be devoted to staff meetings, child study team meetings, parent conferences, professional learning community (PLC) meetings, and professional development training sessions. A minimum of one of these meetings per month will be reserved for professional development.

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### **Enrollment and Marketing:**

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

### **Marketing Plan**

*Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflects 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)).*

The School has a comprehensive plan that will attract the target population and ensure that enrollment projections are met. The School will use a variety of strategies to publicize the school. At all times, the School's admission and enrollment practices will comply with Federal guidelines (Charter Schools Program, Title V, Part B, Non-Regulatory Guidance) and with G.S. 115C-238.29(F)(g). The School intends to contract with a proven, successful vendor with expertise in charter school marketing and media development, EMG Interactive. EMG Interactive has a long track record of supporting the marketing, branding, and outreach efforts for charter, private, and public schools. Their services include brand development, images, logos, websites, collateral materials, blogs, print campaigns, and video production.

The School will develop a comprehensive marketing plan with outreach activities taking place from January through the School opening. Marketing efforts will begin with a website with video and text content that will provide families with information related to curriculum, enrollment, targeted student expectations, and staff qualifications. Visitors will be directed to this website through all communications as well as an ongoing Google "AdWords" online ad campaign.

The School will develop a comprehensive brochure and informational flyers to provide families with information, including the School's mission. The School will provide marketing materials in languages other than English and will also make bilingual staff available to answer parent questions. Samples of similar materials are in Appendix U5.

The School will distribute information to the parents of appropriately-aged students, hold open houses, and advertise via the local media. The School will utilize local public radio and print media to make announcements regarding enrollment opportunities and parent information meetings. Marketing materials will be distributed in local shopping areas, public places, local youth programs, local athletic programs, and other areas as deemed appropriate to serve our mission and reach all families, including those that are typically hard to reach. The School will canvass neighborhoods considered "harder to reach" and distribute the flyers with school information.

The School believes that this focused marketing approach will help to meet or exceed enrollment targets and achieve a racial/ethnic balance that accurately reflects the community at large.

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## **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) Communication Prior to Opening

The School has developed a website that went live on Wednesday, September 10, 2014 to inform the community about the proposed school and solicit input. After application approval, this website will continue to be used to engage parents and community members, recruit students, provide information about enrollment, and update parents and the community about progress towards School opening.

Outreach meetings are planned for this fall to inform the community about the School's application, school model, and possible opening. Tentative dates are: October 22 and November 12, 2014.

As students enroll, the School will collect mailing addresses and email addresses to provide a means of communicating with the enrolled students and their families prior to opening. Periodically throughout the summer prior to school starting, the School will mail newsletters and information to the enrolled students. However, more frequently, the School will send regular email communications to parents and students regarding updates on the School facilities, documentation that needs to be provided on students prior to their attending school, and opportunities to attend open houses and other school functions to be held prior to opening.

These frequent email communications will provide the opportunity for the School to stay connected to the students and their families prior to the school opening, and provide the means for communicating important information to the families as they prepare for school. These newsletters and memos will also be mailed to the students' homes periodically in case families do not have access to or do not check email.

### (2) Family Partnerships

The School realizes that its strength lies in the hands of its parents/guardians and the extent to which they become involved in the daily activities of the students. For this reason, the School will actively encourage the participation of parents/guardians in all of its activities. Opportunities for involvement may include, but are not limited to the following.

A School Advisory Council (SAC) will be formed to provide input from all stakeholders to the School administration and the Board.

As required by law, parents will be invited and encouraged to participate in the development of their child's IEP when a student meets the necessary requirements for Exceptional Children services.

Parents/guardians shall be asked to attend school events and volunteer for a minimum of 10 hours of service to the School each year their child is

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enrolled. Volunteer opportunities may include, but are not limited to: assisting teachers in classrooms; assisting in the cafeteria; assisting teachers with tasks outside of school, such as filing, preparing curriculum materials, etc.; mentoring students; volunteering with the School's Parent Teacher Organization, if one is formed; chairing a school committee; chaperoning field trips; and/or attending school events.

The School shall hold at least 1 parent open house per semester.

Parents or guardians will be given the opportunity to evaluate the School at least annually.

Parents will be notified of the governing board's schedule of meetings and invited to attend and provide input.

## **Admissions Policy**

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

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

### (1) Enrollment

The School will enroll any eligible student without discrimination in accordance with 115C-238.29F(g)(5).

In year 1, the School will hold an open enrollment application period of not less than 30 days beginning on February 1, 2016. All applications will be assigned a number in the order received based on the grade level for which the student is applying.

In subsequent years, the School will provide currently enrolled families the opportunity to re-enroll for the following school year. This shall take place no later than March of each year. At that time, families will also be allowed to apply for additional students who qualify for preferential enrollment under sibling preference, in accordance with 115C-238.29F(g)(5a).

After the School has confirmed the number of available spaces for the upcoming academic year, an open enrollment period of at least 30 days will be held.

A student will have been determined to have accepted enrollment when he/she has returned the acceptance letter with the appropriate parent/guardian signature along with the signed family agreement.

### (2) Lottery

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In the event that the number of applications exceeds the number of available spaces, the School will conduct a lottery. Numbers will be randomly selected for applicants for each grade level to determine which students are invited to enroll and which students will be on the waiting list. Students will be given 10 days from notice of acceptance to confirm attendance. If a student declines enrollment or fails to respond within the given time frame, the enrollment will be offered to the next student on the waiting list until all student stations are filled.

Enrollment preference will be given to the following populations as specified in 115C-238.29F(g)(5a):

1. Siblings of currently enrolled students
2. Siblings of students who completed 8th grade at the School and who were enrolled in at least 4 grade levels offered by the School
3. No more than 15% of the School's total enrollment may include children of the School's full-time employees and, for the first year of operation, children of the initial members of the School's Board of Directors
4. A student who was enrolled in the School within the 2 previous school years but left a) to participate in an academic study abroad program or a competitive admission residential program or b) because of the vocational opportunities of the student's parent

Students with disabilities and students served in English for Speakers of Other Languages programs shall have an equal opportunity of being selected for enrollment in the School.

### (3) Enrollment Policies

The Board will adopt clear policies for Admissions and Enrollment similar to the draft language below:

**WAITING LISTS** - In the event that the number of applications exceeds the number of available spaces, the School will conduct a lottery. Numbers will be randomly selected for applicants for each grade level to determine which students are invited to enroll and which students will be on the waiting list. Students will be given 10 days from notice of acceptance to confirm attendance. If a student declines enrollment or fails to respond within the given time frame, the enrollment will be offered to the next student on the waiting list until all student stations are filled.

**WITHDRAWALS AND TRANSFERS** - Students who leave the School must notify the School office and classroom teacher in writing, return all textbooks and library, and verify that all lunch monies are paid in full.

**RE-ENROLLMENT** - A student who was enrolled in the School within the 2 previous school years but left a) to participate in an academic study abroad program or a competitive admission residential program or b) because of the vocational opportunities of the student's parent will be provided with an enrollment preference subject to space availability.

### (4) Pre-admission Activities

No pre-admission activities will be required.

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**PROJECTED ENROLLMENT**

**2016-17 through 2020-2021**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Winston Salem/Forsyth County Schools

LEA #2 Guilford 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 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000	LEA 340	LEA 410	LEA 000
Kindergarten	87	1	0	87	1	0	87	1	0	87	1	0	87	1	0
Grade 01	65	1	0	87	1	0	87	1	0	87	1	0	87	1	0
Grade 02	65	1	0	65	1	0	87	1	0	87	1	0	87	1	0
Grade 03	65	1	0	65	1	0	65	1	0	87	1	0	87	1	0
Grade 04	65	1	0	65	1	0	65	1	0	65	1	0	87	1	0
Grade 05	43	1	0	65	1	0	65	1	0	65	1	0	65	1	0
Grade 06	0	0	0	49	1	0	74	1	0	74	1	0	74	1	0
Grade 07	0	0	0	0	0	0	49	1	0	74	1	0	74	1	0
Grade 08	0	0	0	0	0	0	0	0	0	49	1	0	74	1	0
	390	6		483	7		579	8		675	9		722	9	



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**Section IV: Governance and Capacity**  
Concerns and Additional Questions

**Reviewer**

**Page  
Reference**

**Reviewer**

**Score**

## **V. OPERATIONS**

### **Transportation Plan:**

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

The School will ensure that transportation will not be a barrier to any student's ability to attend the School. The School will provide transportation for the School's students consistent with the state requirements of 115C-238.29F(h) and federal rules and regulations.

Transportation revenue and expenses are not included in the proposed budget. The transportation needs at Newpoint's other schools show that the majority of students come from within 3-5 miles of the School and most parents desire to drop off their children. In this situation, the School will help connect families to support carpooling. However, we understand that this may not be the case with this School.

Should transportation be required in order to enroll eligible students, the School may contract with an outside provider in order to establish the capacity to provide proper, safe student transportation. The School will ensure that any transportation provider provides proof that:

- \*all personnel who may have contact with students have appropriate background clearance and picture identification that list the staff member's name and the name of the company.

- \*all vehicles are properly maintained and meet security and safety requirements.

- \*students are only being transported in approved vehicles and that there is no use of passenger vans.

The School will provide transportation for any student with a disability who has transportation indicated on the IEP.

### **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.*

The School will ensure that no child is lacking and daily meal and intends to contract with the School District or a private provider to provide food service in a way that will serve all eligible students. All food service may be provided in a manner consistent with the Food and Drug Administration (FDA) requirements for free/reduced price lunch.

The School will require that the provider show proof of the following:

- \*All meals have been approved by a registered dietician

- \*All meals meet the requirements for free/reduced price lunch

- \*Proof of all applicable health and safety inspections

- \*Ability to deliver

- \*Meals are delivered in appropriate containers

- \*Non nutritional items such as soda are not included

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The School may, at the end of the first year of operation, apply for provider status through the Federal Government.

**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		\$1,546.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,332.00
Property Insurance	\$275,000		\$450.00
Motor Vehicle Liability	\$1,000,000		\$181.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$7,468.00
Total Cost			\$13,309.00

\*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.

stiles.forsyth                      09/25/2014

(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).*

A facility has not yet been identified. The Board anticipates leasing a facility that is approximately, 65 square feet per student, which is consistent with other schools managed by Newpoint Education. The School will utilize a facility that meets the following requirements:

- \*Meets or exceeds all local building and fire/safety codes
- \*Has appropriate space for classrooms, specialty rooms, a media center, a multi-purpose room, and administrative areas
- \*Has adequate parking for staff, students, and visitors
- \*Is accessible to persons with disabilities
- \*Has at least 1 flushable toilet per 20 occupants and at least 1 sink per 40 occupants
- \*Has a monitored fire/burglary system

Although locating, securing, and renovating an appropriate facility in North Carolina can be challenging; managed appropriately, excellent facilities can be secured and renovated within a 120-150 day timeline. The School will have more than adequate time to open the School for the start of the 2016-17 school year. The following steps will be taken to secure a facility:

Oct-Dec 2015: Site Selection including site tours and analysis

Nov 2015-Jan 2016: Letter of Intent signed, design finalized

Dec 2015- Feb 2016 General contractor selected, lease signed

Jan-Apr 2016: Plans and permits submitted and approved

Mar-July 2016: Construction

July-Aug 2016: Regulatory approvals, including Certificate of Occupancy, FF&E installed, insurance secured

All efforts will be made to make certain that all settings are conducive to learning. This learning environment includes both the interior and exterior of the facility. A sample School site plan and layout are included in Appendix U6.

We will work closely with local officials to see that the School is in complete compliance with all zoning regulations, building and renovation permits, safety codes, occupancy permits, and all other applicable federal, state, and local laws and regulations. The School will pay particular attention to compliance in the following areas: fire exits, parking, traffic, sprinkler systems, alarm systems, and keeping inspections current.

A certificate of occupancy and any other required documentation shall be submitted to the NCDPI Office of Charter Schools at least 15 days before the first day of school.

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

We anticipate that the per square foot lease rate will be between \$10-\$16/sq. ft. depending on location, condition, etc.

**Facility Contingency Plan:** *Describe the method of finding a facility if the one the board has identified*

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*will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.*

The Board has every expectation that we will be able to open our School on time. At opening in Year 1, the School's immediate spatial needs will include 18 classrooms, 2-3 classrooms for educational support (art, music, special education, etc), a multi-purpose room, outdoor recreational space, and administrative space.

However, we also understand that unforeseen circumstances can occur. If the School opening is delayed to the point where we will not be able to open on-schedule, we will do the following:

1. Define the specifics of the delay and determine a realistic opening schedule.
2. Coordinate and communicate this information with Office of Charter Schools (OCS) personnel.
3. Determine whether the School can open on a delayed schedule.

Depending on the outcome of the above items, the School will proceed as follows:

Option 1: If the School can open on a delayed schedule, School staff will relay all relevant information to OCS, parents, and students.

Option 2: If the School cannot open on a delayed schedule, the School will temporarily lease and utilize appropriate space from a school or other educational institution such as a Community College, Private Technical College, Charter School, etc. The School's immediate spatial needs will include 33 classrooms and administrative space. We will plan for all programs to be offered in temporary space. Contingency plans for temporary space and short-term leases will be in-place by February 2016.

Option 3: If the construction schedule is such that the School opening is delayed 7 or more months, the School will (as a last resort) request a one-year deferral for opening.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
The handbook does not align to the transportation plan, the handbook says that "Bus transportation will be available for students who live between 2 and 4 miles from the school"	Robin Kendall	Transportati
Budget is low for proposed student population.	Mary Carmichael	School Lunch
\$5000 seems low given anticipated student population.	Paige Hirsch	School Lunch
The school has budgeted 5,000 for child nutrition for each of years 1 - 5. The school may join the Federal lunch program in year 2. In year 1, if 56.5% of the intended population of the county qualifies for free and reduced lunch that is 223 students. \$5,000 is not adequate to serve this population.	Robin Kendall	School Lunch
Same quote as Piedmont Prep.	Kevin Piacenza	Civil Liabil

<b>Reviewer</b>	<b>Score</b>
Cheryl Turner	
Joe Maimone	
Robin Kendall	Pass
Becky Taylor	
Eric Sanchez	

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Helen Nance	
Mike McLaughlin	
Paige Hirsch	Pass
Marie Massengill	
Alex Quigley	
Sherry Reeves	
Mary Carmichael	Pass
Tammi Sutton	
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	
Kevin Piacenza	Pass

## VI. FINANCIAL PLAN

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

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

<p><b>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</b></p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p><b>State Funds:</b> Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1<sup>st</sup> month average daily membership.</p> <ul style="list-style-type: none"> <li>In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides</li> <li>In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located.</li> </ul> <p><b>Local Funds:</b> Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p><b>Federal Funds:</b> Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p><b>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</b></p>			
	<p>LEA #1 340 - Winston Salem/Forsyth County Schools</p>			
	<b>Revenue</b>	<b>2014-2015 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2016-2017</b>
	State Funds	\$4,705.86	390	\$1,835,285.40
	Local Funds	\$1,968.00	390	\$767,520.00
	Federal EC Funds	\$3,768.11	39	\$146,956.29
	<b>Totals</b>			\$2,749,761.69
	<p>LEA #2 410 - Guilford County Schools</p>			
	<b>Revenue</b>	<b>2014-2015 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2016-2017</b>
	State Funds	\$4,615.50	6	\$27,693.00
Local Funds	\$2,301.17	6	\$13,807.02	
Federal EC Funds	\$3,574.51	0	\$ .00	
<b>Totals</b>			\$41,500.02	

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
<b>-State ADM Funds</b>	\$1,862,978	\$2,035,260	\$2,761,511	\$3,217,842	\$3,438,952
<b>-Local Per Pupil Funds</b>	\$781,327	\$996,790	\$1,158,174	\$1,349,559	\$1,442,292
<b>-Exceptional Children Federal Funds</b>	\$146,956	\$184,632	\$222,312	\$256,224	\$275,064
<b>-Other Funds*</b>	\$0	\$0	\$0	\$0	\$0
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$2,791,262	\$3,216,682	\$4,141,997	\$4,823,625	\$5,156,308

**\*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:															
Lead Administrator	1	\$80,000	\$80,000	1	\$80,800	\$80,800	1	\$81,600	\$81,600	1	\$82,400	\$82,400	1	\$83,200	\$83,200
Assistant Administrator	1	\$55,000	\$55,000	1	\$55,550	\$55,550	2	\$56,100	\$112,200	2	\$56,650	\$113,300	2	\$57,200	\$114,400
Clerical	2	\$28,000	\$56,000	3	\$28,280	\$84,840	3	\$28,560	\$85,680	3	\$28,840	\$86,520	3	\$29,120	\$87,360
Custodians	1.5	\$30,000	\$45,000	2	\$30,300	\$60,600	2	\$30,600	\$61,200	2	\$30,900	\$61,800	2	\$31,200	\$62,400
A - Total Admin and Support:	5.5		\$236,000	7		\$281,790	8		\$340,680	8		\$344,020	8		\$347,360
Instructional Personnel:															
Core Content Teacher(s)	18	\$40,000	\$720,000	22	\$40,400	\$888,800	26	\$40,800	\$1,060,800	30	\$41,200	\$1,236,000	32	\$41,600	\$1,331,200
Electives/Specialty Teacher(s)	2	\$40,000	\$80,000	3	\$40,400	\$121,200	3.5	\$40,800	\$142,800	4	\$41,200	\$164,800	4.5	\$41,600	\$187,200
Exceptional Children Teacher(s)	1.5	\$40,000	\$60,000	2.5	\$40,400	\$101,000	3	\$40,800	\$122,400	3.5	\$41,200	\$144,200	4	\$41,600	\$166,400
Teacher Assistants	.5	\$21,000	\$10,500	2	\$21,210	\$42,420	3	\$21,420	\$64,260	5	\$21,630	\$108,150	5	\$21,840	\$109,200
B - Total Instructional Personnel:	22		\$870,500	29.5		\$1,153,420	35.5		\$1,390,260	42.5		\$1,653,150	45.5		\$1,794,000
A+B = C - Total Admin, Support and Instructional Personnel:	27.5		\$1,106,500	36.5		\$1,435,210	43.5		\$1,730,940	50.5		\$1,997,170	53.5		\$2,141,360
Administrative & Support Benefits															

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Health Insurance	5.5	\$6,436	\$35,398	7	\$6,219	\$43,533	8	\$6,578	\$52,624	8	\$6,803	\$54,424	8	\$7,114	\$56,912
Retirement Plan--Other	5.5	\$1,290	\$7,095	7	\$1,207	\$8,449	8	\$1,278	\$10,224	8	\$1,290	\$10,320	8	\$1,302	\$10,416
Medicare, Soc. Security, Unemployment	5.5	\$3,711	\$20,411	7	\$3,482	\$24,374	8	\$3,684	\$29,472	8	\$3,720	\$29,760	8	\$3,756	\$30,048
D - Total Admin and Support Benefits:	16.5		\$62,904	21		\$76,356	24		\$92,320	24		\$94,504	24		\$97,376
Instructional Personnel Benefits:															
Health Insurance	22	\$5,935	\$130,570	29.5	\$6,040	\$178,180	35.5	\$6,226	\$221,023	42.5	\$6,360	\$270,300	45.5	\$6,624	\$301,392
Retirement Plan--Other	22	\$1,187	\$26,114	29.5	\$1,172	\$34,574	35.5	\$1,174	\$41,677	42.5	\$1,167	\$49,598	45.5	\$1,183	\$53,827
Medicare, Soc. Security, Unemployment	22	\$3,423	\$75,306	29.5	\$3,382	\$99,769	35.5	\$3,388	\$120,274	42.5	\$3,365	\$143,013	45.5	\$3,411	\$155,201
E - Total Instructional Personnel Benefits:	66		\$231,990	88.5		\$312,523	106.5		\$382,974	127.5		\$462,910	136.5		\$510,419
D+E = F - Total Personnel Benefits	82.5		\$294,894	109.5		\$388,879	130.5		\$475,294	151.5		\$557,414	160.5		\$607,795
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	22		\$298,904	28		\$358,146	32		\$433,000	32		\$438,524	32		\$444,736
B+E = H - Total Instructional Personnel (Salary & Benefits)	88		\$1,102,490	118		\$1,465,943	142		\$1,773,234	170		\$2,116,060	182		\$2,304,419
G+H = J - TOTAL PERSONNEL	110		\$1,401,394	146		\$1,824,089	174		\$2,206,234	202		\$2,554,584	214		\$2,749,155

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
	Administrative & Support:					
Office:	Office Supplies	\$16,000	\$18,100	\$18,426	\$18,831	\$19,421
Management Company	Contract Fees	\$237,316	\$203,846	\$470,362	\$548,088	\$585,749
Professional Contract	Legal Counsel	\$8,000	\$10,000	\$10,000	\$10,000	\$10,000
Facilities	Facility Lease/Mortgage	\$415,800	\$515,400	\$616,350	\$718,200	\$767,550
	Maintenance	\$8,000	\$25,000	\$25,501	\$26,012	\$26,500
	Insurance (pg19)	\$13,309	\$13,575	\$13,846	\$14,123	\$14,406
Other	Marketing	\$20,000	\$7,500	\$5,000	\$5,000	\$5,000
	Child nutrition	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Office:	Technology Support And Communications	\$51,000	\$51,450	\$52,634	\$53,845	\$55,086
Professional Contract	Financial Services And Audit	\$41,825	\$56,061	\$60,142	\$63,870	\$66,035
Facilities	Utilities - Gas, Water, Electric	\$66,000	\$90,000	\$60,142	\$63,870	\$66,035
Transportation	Contracted Transportation	\$41,580	\$51,450	\$52,634	\$53,845	\$55,086
Other	Miscellaneous	\$20,000	\$20,000	\$20,000	\$20,000	\$20,000
	K - TOTAL Administrative & Support Operations	\$943,830	\$1,067,382	\$1,410,037	\$1,600,684	\$1,695,868
	Instructional:					
Books And Supplies	Curriculum, Software, And Materials	\$117,000	\$66,560	\$72,475	\$77,799	\$70,149
Instructional Contract	Professional Services, Ec, And Staff Development	\$143,760	\$172,960	\$203,451	\$233,950	\$248,520
Books And Supplies	Classroom Equipment, Technology, And Furniture	\$110,500	\$26,500	\$26,500	\$26,500	\$15,000
	L - TOTAL Instructional Operations	\$371,260	\$266,020	\$302,426	\$338,249	\$333,669
	K+L = M - TOTAL OPERATIONS	\$1,315,090	\$1,333,402	\$1,712,463	\$1,938,933	\$2,029,537

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
J - TOTAL PERSONNEL	\$1,401,394	\$1,824,089	\$2,206,234	\$2,554,584	\$2,749,155
M - TOTAL OPERATIONS	\$1,315,090	\$1,333,402	\$1,712,463	\$1,938,933	\$2,029,537
J+ M =N TOTAL EXPENDITURES	\$2,716,484	\$3,157,491	\$3,918,697	\$4,493,517	\$4,778,692
Z - TOTAL REVENUE	\$2,791,262	\$3,216,682	\$4,141,997	\$4,823,625	\$5,156,308
Z - N = SURPLUS / (DEFICIT)	\$74,778	\$59,191	\$223,300	\$330,108	\$377,616

**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.*

Consideration was given to areas of need when determining the location, grades to serve, and enrollment projections. Major factors considered were: total population, school age population, household size, household income, free and reduced lunch qualification, charter competition and performance, and public school performance. All indicators were factored using a 5 mile radius from the city center. Based on historical enrollment data, most students who are enrolled in a local charter will reside within a 3 to 5 mile radius of the School. (See Appendix A).

A total of 136,029 people reside within a 5 mile radius of downtown Winston-Salem, North Carolina. There are a total of 30,262 family groups, of which approximately 70% have children. About 24% of the population surrounding Winston-Salem, North Carolina is below the age of 18 years old. Children between the ages of 0-5 make up 7.76% of the population surrounding Winston-Salem, North Carolina.

Based on historical data parents who reside in lower income areas, particularly those students who qualify for free and reduced lunch, are more likely to engage in school choice. About 37% of households within a 5 mile radius of Winston-Salem, North Carolina reported total annual income of less than \$25,000. The median household income for the area surrounding Winston-Salem, North Carolina ranged from \$9,975 to \$131,397, compared to a state median of \$46,450, as estimated for 2008-2012 by the Census' American Community Survey.

Currently, only three charter schools serving students in grades K-8 are located in Winston-Salem, North Carolina. These three charters have a combined enrollment of about 1400 students. Only one local charter (The Arts Based School) is high performing. Most students in Winston-Salem, North Carolina reside at least 1.5 to 5 miles from a high performing school. The area surrounding the city center of Winston-Salem, North Carolina has sufficient population to add additional charter schools when compared to similar sized cities.

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

In the School's financial statements, the Board will be able to see the budget to actual comparison, as well as notes to the financial statements which include projected and actual enrollment. Based on this information the governing board will be able to determine if enrollment is significantly lower (or higher) than expected and can begin to determine the appropriate budget cuts. If needed, budget cuts will begin in the administration level to ensure the quality of instruction of the School is maintained. If there are significant budget shortfalls, Newpoint Education will fund the shortfall to ensure that the School does not have financial emergencies and will not end the school year in a deficit (See Section 11.D. of the Management Agreement in Appendix L).

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

The total start-up related expense is projected to be approximately \$150,000 during or prior to the first year of operations. Newpoint Education will provide the funds needed to cover these costs. (See Section 4 of the Management Agreement in Appendix L.) No monies will need to be advanced by the School per the terms of the management agreement. Other than these start-up expenses, the budget is balanced on expected state, county, and federal funds.

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

22:1 for K-5, and 25:1 for 6-8

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

(1) Contracted Services

The School has planned to contract for selected services critical to effective School operations.

LB&A, Certified Public Accountants, PLLC in cooperation with North Carolina Public Charter Schools Association will provide full service accounting services, including GAAP compilations, monthly bank reconciliations, and monthly financial statement preparation for Board members.

School Financial Services, Inc. (SFS), an experienced charter school specialist accounting firm, will provide Human Resources services including payroll and benefits.

EMG Interactive is a proven, successful vendor with expertise in charter school marketing and media development. Their services include brand development, images, logos, websites, collateral materials, blogs, print campaigns, and video production.

David Hotstetler, with Lex-Is Services, has been retained as counsel for the School.

EC services, which cannot be provided by existing school staff (such as

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speech/language services, occupational therapy, and physical therapy), will be contracted for with outside providers.

Critical to the selection of the School's providers is that each of these service providers has a leadership team with a deep understanding of and extensive experience in the provision of their respective services to schools in general and charter schools in particular. One or more members of the Board have established a strong understanding of the capabilities of the leadership team of each service provider and the character of key members of the leadership team. This has been a key element to evaluating each provider.

## (2) Large Purchases

To purchase goods and services, a Purchase Request will require 2 or more people to approve. A Purchase Request will be initiated by the school employee or Board member making the request. The request will be approved by the site administrator or the designated Board member such as treasurer or similarly positioned member if one is delegated with this authority depending on Charter School Board policy. Typically RFPs over \$10,000 need to be approved by the Charter School Board but Charter School Board can adjust this limit as per their policy. The purchase request will be processed by the financial services provider. The Charter School Board will set the amounts that the School Director may approve for purchase and the amounts the Charter School Board must approve.

The Purchase Request must be verified for transaction and budget authority. After the Purchase Request is processed, a Purchase Order will be generated by the financial services provider. Three copies of the Purchase Order will be generated. Two copies will be sent to the School, one copy to the originator of the Purchase Request, and the receiving copy to the designated person to receive the goods. The third copy will be the vendor copy used for order confirmation.

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

The Board stresses that first and foremost it is accountable to the students and their families. The School will provide an educational program of the highest caliber to promote enhanced academic success while remaining faithful to sound economic and budgetary principles through aligned responsibility and financial accountability. The School understands that with the receipt of public funds it becomes the keeper of public trust and must fiscally perform in a manner which reflects the highest standards.

The budgets reflect the collaborative effort of the School's founders, Newpoint Education, and LB&A, Certified Public Accountants, PLLC. By this team effort, these budgets are the product of leveraging the knowledge of the School's vision, environment, and instructional model with the practical value of a experienced accounting and budgeting for charter schools. The largest expenditure, of course, is instructional costs with approximately fifty percent (50%) of the budget dedicated to personnel, instructional supplies, textbooks, furniture and equipment, and technology. The largest portion of instructional costs is allocated to instructional salaries and benefits.

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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 School has budgeted healthy surpluses (1.8% - 7.3%) each year that will be put into a general fund balance. Our long term goals are to have a minimum of 45 days of cash reserves by the end of year 5 and a minimum of 75 day cash reserves by the end of year 10. This goal will be achieved through careful budgeting and the use of sound financial management strategies.

The Board finance committee members will review monthly financial reports on a monthly basis. At each regularly scheduled board meeting, the finance committee will give a report and the whole board will be involved in major financial decisions.

If the School is able to maintain the budgeted surpluses and have a healthy general fund balance, the Board will analyze the needs of the School and apply the surplus appropriately.

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

We will seek to acquire a facility that includes landlord financing for any needed renovations. This structure has worked in each of the schools managed by Newpoint. In this structure, the landlord will acquire and/or renovate a building suitable for use as a school. The terms of the lease will require the landlord to deliver the facility by July 1, 2016 or other deadline sufficient to start school in 2016, provide a turn-key facility to the specifications of the school. These specifications will include number of classrooms required, parking, outdoor recreation space, restrooms, common areas, administrative space, low voltage, signage, and other details. This type of lease limits the School's up-front investment, and gives the landlord a financial incentive to complete the facility on-time.

Newpoint Education will provide the funds needed to cover start-up costs. (See Section 4 of the Management Agreement in Appendix L.)

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*

The School will not have assets from other sources.



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

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

Internal controls are based on sound practice, such as segregation of duties or compensating controls, use of pre-numbered forms, limited access to cash, and monthly reporting to the Charter School Board and Authorizer. The business process also emphasizes the seamless and convenient delivery of service so that school staff can easily comply with internal controls and are able to concentrate on the educational process.

The internal control policy of the School shall be guided by the following broad principles:

- \*Responsibility will be clearly established.
- \*Adequate records will be maintained.
- \*Assets will be insured and inventoried, and appropriate employees bonded.
- \*Adequate procedures for cash receipts, cash disbursements, and record keeping will be in place.
- \*The School will undergo regular and independent audits.

Specific internal controls include, but are not limited to:

- \*Only one primary operating bank account will be maintained by the School (others may be maintained for internal funds).
- \*The bank statement will be opened intact by the reconciler.
- \*The bank statement will be reconciled by an employee who has access to neither the general ledger nor check-writing system.
- \*Items outstanding for 180 days will be investigated.
- \*All funds will be deposited to the bank account on a daily basis intact or whenever practical. At a minimum, no receipts will go longer than 3 days without being deposited.
- \*All checks received will be immediately stamped "For Deposit Only."
- \*Printed, pre-numbered receipts will be issued for all cash received whenever possible.
- \*All disbursements will be made by check (except for minor petty cash disbursements). Printed, pre-numbered checks will be used and voided checks will be maintained to complete the number sequence. (School personnel may be permitted use of a pre-paid debit card for emergency purchases or to facilitate local transactions where a card is required. This account is only resupplied after reconciliation of prior use with a complete and full accounting of expenditures supported by receipts.)
- \*Checks require two signatures.
- \*Checks will not be pre-signed under any circumstances.
- \*Checks for expenses other than payroll will be issued only upon verification by the School Director of receipt of the good or services ordered in good condition and correct quantity. The School may authorize disbursements for contracted services, leases, notes payable, ongoing commitments, etc., payables for goods/services that are confirmed as rendered/received by the School and within the limits of the approved budget.
- \*Appropriate documentation will be maintained for disbursements (invoice, contract, etc). All invoices will be reviewed and initialed for approval before a check is issued.
- \*Employees will be paid only upon verification of employment by Board



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action.

\*Appropriate legal forms (W-4, I-9, etc) must be completed prior to employees being paid.

\*Property will be tagged and inventoried at least annually.

\*Discrepancies in the property inventory will be investigated and reconciled.

\*Financial statements will be reviewed by the Board monthly.

\*The budget will be approved by the Board prior to the beginning of each fiscal year, evidenced by action.

\*Budget amendments will be approved as necessary.

\*Financial reports will be submitted to the sponsor as required.

\*School financial records, including files for receipts, invoices, bank statements, and cancelled checks will be kept up-to-date and fully accessible at all times.

\*An annual audit will be conducted by an independent CPA.

\*Under no circumstances are School funds to be used for personal benefit or gain by administration or staff.

The School will establish an Accounting Manual that will provide a framework to understand the internal controls which will be in place to safeguard finances.

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

Not applicable. There are currently no known or possible related party transactions.

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

The annual audit will be completed by:

Rives and Associates, LLP

Jay Sharpe, CPA

702 Oberlin Road, Suite 410

Raleigh, NC 27605

919-832-6848

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<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
A TA at the school is making \$9,000 less than the custodian? The retirement benefits per person seems low.	Robin Kendall	Personnel Bu
Management company fees and facility lease lines are a large part of overall budget. This is in addition to other contracted services going to the management company.	Mary Carmichael	Operations B
What is the break-even point for student enrollment? How will the school reach their enrollment targets if already most students in W-S reside at least 1.5 to 5 miles from a high performing school. 2  What is the \$150,000 for start up funds going to?	Robin Kendall	Budget Narra

<b>Reviewer</b>	<b>Score</b>
Marie Massengill	
Cheryl Turner	
Kevin Piacenza	Pass
Alex Quigley	
Steven Walker	
Mike McLaughlin	
Sherry Reeves	
Robin Kendall	Pass
Alan Hawkes	
Becky Taylor	
Phyllis Gibbs	
Tammi Sutton	
Eric Sanchez	
Joe Maimone	
Mary Carmichael	Pass
Helen Nance	
Paige Hirsch	Pass

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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).*

stiles.forsyth

Date: 09/26/2014

**Applicant Signature:**

The foregoing application is submitted on behalf of Forsyth Preparatory Academy (*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: stiles.forsyth

Board Position: David Edwards - Board Advisor

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

Date: 09/26/2014

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

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

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

## OVERALL ASSESSMENT

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

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

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

<b><u>Total External Evaluator Votes</u></b>	
<b>No</b>	<b>Yes</b>
2	2

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

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

***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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<b>Initial Screening</b>	
<b>Mission, Purposes, and Goals</b>	- rkadmin
<b>Education Plan</b>	- rkadmin
<b>Governance and Capacity</b>	- rkadmin
<b>Operations</b>	- rkadmin
<b>Financial Plan</b>	- rkadmin
<b>OVERALL</b>	<p>Conversion evidences including financial history YR 11-13 are marked as "NA".</p> <p>Appendix A - Conversion Evidences including statement of support, last payroll outlining current staff, current school enrollment and parent support of conversion is not included as appendix A says "This attachment is Not applicable". - dtsmith840</p> <p>- rkadmin</p> <p>- rkadmin</p>

<b>External Evaluator</b>	
<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> Mission is same as Piedmont. Will this model differ at all? - kpiacenza</p> <p><u>Educational Need and Targeted Student Population</u> Appendix A includes community support information regarding evidence of educational need. The applicant conducted a survey, it is unclear how many people responded to the survey. Substantial evidence of educational need is not included. - rkadmin</p> <p><u>Educational Need and Targeted Student Population</u> It appears that the school was designed in an attempt to offer a specific educational program, not necessarily in response to an identified need. The statement, "The school will focus its recruitment efforts on students who will benefit from authentic learning experiences in a collaborative, nurturing environment. The character traits of students who will excel at our School are students who..." raises concerns with respect to access and whether the school has a specific kind of student in mind, rather than being able to provide anyone who applies with a high-quality education. - paigeabramsonhirsch</p> <p><u>Purposes of Proposed Charter School</u> Teachers: this explanation does not seem to qualify notably "new" in terms of what most teachers experience in schools; many teachers are in PLCs, attend staff meetings, etc... - paigeabramsonhirsch</p> <p><u>Purposes of Proposed Charter School</u> Same as Piedmont Prep. - kpiacenza</p>

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	<p><u>Goals for the Proposed Charter School</u> The stated areas of operations, finance, and governance are expectations of all public schools in North Carolina, not SMART goals. The process of how the governing board will monitor the progress of these performance goals is unclear since some of them are state requirements and not goals. - rkadmin</p> <p><u>Goals for the Proposed Charter School</u> With current Guilford students at 43.2% proficient, the goal of 44% proficiency in its first year seems less than ambitious. There is no year-to-year matched cohort growth measure, or other relative growth measure. Given the school's intended use of DEA, it seems reasonable to expect a growth metric based on its use. "Regular reports" is not defined-is this monthly? Quarterly? - paigeabramsonhirsch</p> <p><u>Goals for the Proposed Charter School</u> Goals for academics are based on one composite measure and for operations and other functions are non-existent. - maryvcarmichael</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> How does the Discovery Educational Assessments align with Project Based Learning? How will teaching and learning be assessed with Project Based Learning? The school's targeted population states that "the School's population will reflect the racial and ethnic composition of the school district". According to the 2012-2013 Free and Reduced Meals Application Data provided on the DPI website, 56.55% of students in Winston Salem/Forsyth County Schools qualify for Free and Reduced Lunch. It is unclear given the information how the research supports project based learning for the proposed population. - rkadmin</p> <p><u>Instructional Program</u> Do DEA assessments align with PBL? No discussion of the applicability of DEA to PBL. Given the nature of PBL, one could assume there would be rubric/portfolio assessment tools.</p> <p>I'm not a PBL expert, but is it typical to have so many off-the-shelf curriculum choices when planning to implement PBL? My assumption was that PBL was more interdisciplinary and teacher-developed than what is typically included in established curricula.</p> <p>What is the documented evidence (I don't see any cited) that this approach will lead to increased performance? - paigeabramsonhirsch</p> <p><u>Instructional Program</u> Instructional program and methods sections do not include enough detail. - maryvcarmichael</p> <p><u>Instructional Program</u> PBL documentation? How does DEA interface with PBL. Are they compatible or complimentary? - kpiacenza</p> <p><u>Curriculum and Instructional Design</u> How are the texts provided aligned with PBL? How is the curriculum framework concentrated to support the targeted student population? The provided scope and sequence has been taken directly from a math curriculum. The schools plan for transitioning students from grade to grade and to the next grade span upon program completion is unclear. What</p>

	<p>role does the DEA assessment have in promotion? Will all students be advanced to the next grade level no matter their DEA assessment? - rkadmin</p> <p><u>Curriculum and Instructional Design</u> Scope and Sequence is directly taken from math curriculum. Would be more valuable to see a scope and sequence that addresses the proposed PBL, generated by the petitioners. Has one been created? - paigeabramsonhirsch</p> <p><u>Curriculum and Instructional Design</u> Curriculum framework and sound plan for educating students is lacking. Appendix B does not include additional support in these areas thought does map out Math scope and sequence. - maryvcarmichael</p> <p><u>Special Programs and "At-Risk" Students</u> The applicant writes that "RTI will be implemented based on the recommendations and technical assistance information available from NCDPI". The RTI process should be in place at the time the application is submitted so that the school can support all students from Day 1. The school will identify students "who are not performing at expected levels: ensuring continued progress and academic growth," what is an expected level? How will students be identified? Who is on the ELL Committee? The State Board of Education policy is written out word for word in certain sections, how is the applicant going to actualize the policy? - rkadmin</p> <p><u>Special Programs and "At-Risk" Students</u> How will students not performing at grade level be identified? What metrics will be used to determine who qualifies for intervention services? Who will deliver Tiers 2 and 3?</p> <p>What kind of training will teachers receive to prepare them to work with ELLs? - paigeabramsonhirsch</p> <p><u>Exceptional Children – Identification and Records</u> Who is 504 coordinator? - kpiacenza</p> <p><u>Exceptional Children – Education Programming</u> In regards to FAPE the application writes "The school will accept all eligible students who reside in the school district" what happens if a students apply from outside of the district? - rkadmin</p> <p><u>Exceptional Children – Education Programming</u> How will students with IEPs access the core, PBL curriculum? What "alternative resources" will ensure this? Will the EC teacher also collaborate with the general ed teacher? Will the EC teacher push-in or will all service be pull-out? Given the focus on PBL, one could assume that it would be problematic for kids with IEPs to be pulled out of the classroom at critical project times. - paigeabramsonhirsch</p> <p><u>Exceptional Children – Education Programming</u> The 60 day timeline cited in the discussion regarding the initial referral is the federal timeline. North Carolina has a different timeline which must be followed. I have a concern that "notification of concern" is being confused with referral. These are different and require different responses. It is concerning that the continuum of service options, while noted as not limited to the mentioned placements, includes homebound/hospitalized but does not mention separate. Note that the determination as to when and if an EC students works directly with the EC teacher either one to one or in small groups is only</p>
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decided by the IEP team and is a part of the student's LRE. The statement is very general. There needs to be clear understanding that if a student is not being success with servies in the general classroom setting, the decision to remove him/her for service to be delivered in another setting or even in one on one w/the EC teacher in the reg. ed classroom can only be made by an IEP team and an amendment to the student's IEP. I am confused by the statement that the school will accept all elig. students who reside in the school district. What is ment by eligible and is there defined district for charters?(Support for FAPE section) - marie\_massengill

Exceptional Children – Education Programming

Will one EC teacher be able to adequately serve a student body of 390? 39 EC students estimated in budget projection. - kpiacenza

Student Performance Standards

The responses to the student performance standards for the school as a whole is a copy past e of the goals from question two in the mission, purpose, and goals section. The responses for operations, finance and governance are not specific and are expectations for all charter schools in North Carolina based on state law, they are not SMART goals. How is PBL included in evaluation of students? The promotion and exit standards and policies are unclear. - rkadmin

Student Performance Standards

As stated before, why is the Year 1 baseline so low, given the GCS performance is only .8 below the proposed 44%? Why no individual growth metrics, given the use of the DEA? Why are there no metrics for non-cognitive skills that are vitally important for students, in addition to academic skills?

One operations goal seems inadequate - paigeabramsonhirsch

Student Performance Standards

There is only one student performance standard and it is the same one used in the Mission section. The application resource manual provides guidance that has not been reflected here. The following is from the manual:

The responses in this section should include clear and measurable educational goals and objectives that set high standards for student performance for each grade level. These goals should expound upon the overall academic goal in the Mission and Purposes section of the application.

- maryvcarmichael

Student Conduct and Discipline

Handbook states that parents are required to volunteer one hour a month. Discipline policies are not fully developed specifically the handbook says that the school "policies may include [a] 1. process for dealing with put-downs, threats, gossip, exclusion, victimization 2. Process for dealing with Chronically Disruptive Students". The process for dealing with these situations needs to be explained in the handbook and should already be established. - rkadmin

Student Conduct and Discipline

Handbook states, "Piedmont Preparatory Academy may develop policies to further define expectations of students. Some of these policies may include..." It is unclear why the school "may" develop policies and has not done so already, or at



	<p>least definitively states it will do so. - paigeabramsonhirsch</p> <p><u>Student Conduct and Discipline</u> While it is the school's decision to use an IEP team to conduct the Manifestation Determination Review, it is not the required team composition. It is also at the discretion of the school to conduct an FBA and develop a BIP for each student whose removals constitute a disciplinary change in placement, it is only required for those whose MDR team determine that the behavior in question is a manifestation of the student's disability. - marie_massengill</p> <p><u>Student Conduct and Discipline</u> Same as Piedmont Prep. - kpiacenza</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> na - maryvcarmichael</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Board members are same individuals as Piedmont Prep. How is this effective and/or appropriate? None appear to have any explicit public education experience. - kpiacenza</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The governance structure is unclear in regards to the board and EMO's relationship. The applicant writes that the lead administrator search will include a team of one or more board members and EMO staff. The board is going to meet at least once per quarter this is not best practice, especially for a new charter school. The grievance process for parents and staff members involves the Executive Director of the EMO, what is the relationship between the EMO and BOD? What experience does the current board have in education? What experience does the current board have in PBL? The applicant does not discuss criteria regarding the evaluation of the governing board, board members or the EMO. Board members are applying to two schools Forsyth and Piedmont, does the board have the capacity to open two schools at once? - rkadmin</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The narrative and org chart do not fully explain the relationship between the board of Triad Education Organization and their two proposed schools. - maryvcarmichael</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Same as Piedmont Prep. This board is serving more than one proposed charter in two different communities. Why would the same group of individuals take on the responsibility for governing two relatively large charter schools in two different cities? A clear explanation for how this is either an effective or appropriate approach is needed. - kpiacenza</p> <p><u>Proposed Management Organization (EMO/CMO)</u> It is unclear if the EMO manages other schools that specialize in PBL. The "arms length" approach between the governing board and the firms that it is hiring seems unattainable since the board is meeting at least 4 times in a year and the EMO agreement states that the EMO is running the daily operations of the school. The lead administrator will be an employee of the EMO. The application writes that "all employees will be employees of the board". Clarification is needed. - rkadmin</p> <p><u>Projected Staff</u> Same as Piedmont Prep. - kpiacenza</p> <p><u>Projected Staff</u></p>

	<p>Details are not provided about how many staff positions will be offered in year 1 -5 or qualifications for positions. Given that this school has a PBL focus, what qualifications will the board be looking for to recruit high quality, knowledgeable teachers? - rkadmin</p> <p><u>Staffing Plans, Hiring, and Management</u> Will the board recruit teachers and school leaders that have training and experience in PBL? The grievance policy has employees going to the EMO and then to the board, what is the rationale behind that? - rkadmin</p> <p><u>Staff Evaluation and Professional Development</u> The professional development plan is to address training that the staff may find beneficial to them. If the board is not recruiting staff specifically for PBL, and the PD plan is flexible, how will staff members receive adequate training for PBL in addition to the staff retreat PD? - rkadmin</p> <p><u>Marketing Plan</u> Limited use of grassroots community recruitment efforts. - maryvcarmichael</p> <p><u>Projected Student Enrollment (Table)</u> The enrollment projections are the same for Piedmont Preparatory School? The enrollment numbers are unrealistic given the location. - rkadmin</p> <p><u>Projected Student Enrollment (Table)</u> Enrollment growth seems overly aggressive. - paigeabramsonhirsch</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> The handbook does not align to the transportation plan, the handbook says that "Bus transportation will be available for students who live between 2 and 4 miles from the school" - rkadmin</p> <p><u>School Lunch Plan</u> The school has budgeted 5,000 for child nutrition for each of years 1 - 5. The school may join the Federal lunch program in year 2. In year 1, if 56.5% of the intended population of the county qualifies for free and reduced lunch that is 223 students. \$5,000 is not adequate to serve this population. - rkadmin</p> <p><u>School Lunch Plan</u> \$5000 seems low given anticipated student population. - paigeabramsonhirsch</p> <p><u>School Lunch Plan</u> Budget is low for proposed student population. - maryvcarmichael</p> <p><u>Civil Liability and Insurance</u> Same quote as Piedmont Prep. - kpiacenza</p>
<p><b>Financial Plan</b></p>	<p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> A TA at the school is making \$9,000 less than the custodian? The retirement benefits per person seems low. - rkadmin</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Management company fees and facility lease lines are a large part of overall budget. This is in addition to other contracted services going to the management company. - maryvcarmichael</p> <p><u>Budget Narrative</u></p>

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	<p>What is the break-even point for student enrollment? How will the school reach their enrollment targets if already most students in W-S reside at least 1.5 to 5 miles from a high performing school. 2</p> <p>What is the \$150,000 for start up funds going to?</p> <p>- rkadmin</p>
<b>OVERALL</b>	<p><u>Cover Page</u> Why is the conversion of an Alamance-Burlington school being relocated to Forsyth Co.? If this a conversion why are the items requested as part of Appendix A not applicable? - kpiacenza</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> 4.1% of the students in Winston Salem / Forsyth County Schools are projected to be attending Forsyth Preparatory Academy by year 5. This is unrealistic for the proposed region. - rkadmin</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Enrollment targets seem aggressive and unrealistic, especially given that many of the grade levels are not natural transition points. - paigeabramsonhirsch</p>

<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and Goals</b>	<p>The members of the board introduced themselves. The board chair explained they had two applications in this round and they would like to remove Piedmont Preparatory Academy from this years interview cycle. Mr. Quigley asked if they had the opportunity visit any schools that the management group managed. A board member replied he had visited three schools in Windsor. Mr. Quigley asked if he was aware that Windsor received an "F" rating. The board member replied the information was cause for thought but the board researched it. The information made the school look worse that it was.</p>
<b>Education Plan</b>	<p>Mr. Quigley asked what was observed at the school. A board member replied his children current attended a school that is rated an "A" and he would not be moving them. He observed a math class in which students were engaged. Mr. Quigley inquired about the schools project based learning component. The board member explained that it would be implemented after students were assessed. The whole student would be engaged and would not be doing rote work. The teacher would guide them.</p> <p>Ms. Turner asked how students would gain basic information. The board member explained in Windsor, there was a learning plan and learning lessons. Mr. Sanchez inquired about the scope and sequence. The board member asked if he was referring to the curriculum. She then explained it came from New Point.</p> <p>Ms. Turner asked who the education experts were on the board. The board replied there was no one on the board with education expertise. They would be adding that person. Ms. Turner asked who wrote the application. A board member replied New Point wrote the application.</p> <p>Ms. Turner noted the teacher evaluation plan was out dated. The board member replied he</p>

	did not have an education background and thought the plan looked good. He explained the board would look at it again and change it when the time was right.
<b>Governance and Capacity</b>	<p>Mr. Walker asked what New Points role would be and how they would be held accountable. The board member explained they would be arranging things such as buses, construction and food. They would be like general contractors and would receive 12%. If there was an issue, the board would contact the attorney.</p> <p>Mr. Quigley noted Ashely was listed as the board chair in the application. The board chair replied it was a typo in the application.</p>
<b>Operations</b>	Mr. Sanchez asked for the rationale for offering project-based learning for at-risk students and how it would meet their needs. The board replied there would be a tier structure based on where the student assessment.
<b>Financial Plan</b>	<p>Mr. Walker noted he was looking for a break-even point in the budget. The board replied it would be 323 and the first year they would be projecting 396 students.</p> <p>Mr. Quigley inquired about the targeted population and 56% of them would qualify for free and reduced lunch. The board member replied the free and reduced lunch program was near and dear to him. The school would break even with those costs. The students would be bringing their lunch and the government would repay them. Mr. Sanchez read from the application and asked if the school would be participating in the Federal Lunch Program. The board member replied there was no way way around offering the lunch program.</p>
<b>OVERALL</b>	Mr. Maimone noted the board was not well versed and he would not feel comfortable granting them a charter. Mr. Quigley agreed and added they had strong, impressive backgrounds. Ms. Turner added they needed an educator on their board. Mr. Walker commented they needed to complete their board and apply again next year. Mr. Sanchez made a motion not to forward Forsyth Preparatory Academy to the Ready to Open process. Ms. Taylor seconded. The motion passed unanimously.

### Overall Summary

<b>Initial Screening</b>	The Office of Charter Schools deems this application incomplete.
<b>10/21/2014</b>	The CSAB voted unanimously to deem this application complete on November 14, 2014.
<b>Application Review</b>	<p>On February 9, 2015 the CSAB subcommittee voted to move this application to interview adjacent with Piedmont Prep. The subcommittee vote was 6 to 0. The full CSAB vote was 11 to 0.</p> <p>Concerns outlined consisted of the following: Mr. Walker stated that he would like the applicant to be prepared to discuss the capacity of the board to open two schools. Mr. Walker stated that geography does not seem to be a problem but capacity of the board could be an issue. Mr. Hawkes is interested to learn about this EMO and how it is structured. Mr. Walker moved to bring them into an interview. Mr. Gibbs seconded.</p> <p>Mr. Quigley asked for the Newpoint Representative to speak to what services the EMO is</p>

	<p>providing to the school. Mr. Quigley asked "What does your management costs would look like in the early stages?" The EMO representative said that the EMO helps provide loans for new buildings or existing buildings. Mr. Quigley asked "do you have any comments on the performance of the schools in Ohio?". The schools in Ohio are doing very well according to the EMO rep. One school is a K-8 model the other is a dropout prevention model. In Ohio schools are authorized in the urban corps. The schools in Florida are doing well and some started as first year schools with low ratings and have improved. Last year in Fort Lauderdale a school closed due to a construction problem. The board needs to get their own financing, although Newport will lend the school money as well. Newport does defer some of its fees in the early years.</p> <p>In the budget the management fees start around \$350,000 more than 10% of the per pupil costs. Mr. Quigley asked "What is the management company doing with that money?" The EMO rep stated that Newport provides the middle level services to the school and they outsource financing and accounting. The school would have their own independent accounting firm. The EMO coordinates all the services the school receives and needs. Mr. Hawkes said that this puts a lot more responsibility on the board. Mr. Hawkes wants to talk with the board to make sure they know what they are getting into. Mr. Quigley asked if the CSAB would be able to talk to the EMO at interview, and Dr. Medley provided the clarifying information and said "no" only the board would be able to talk during the interview.</p> <p>It was asked if any of the existing board was affiliated with the EMO? "No" Is anyone on the existing board going to work at the school? "No" Someone from Newport is on the board and deals with the area of curriculum and instruction.</p> <p>Mr. Quigley stated that the previous track record is not strong academically. The EMO rep stated that the accountability metrics are changing. Mrs. Turner asked " Does the EMO have plans to have people on the ground in North Carolina?" Yes, the school will have people in NC. Mr. Hawkes asked "if EMO members will attending meetings and take minutes?" Yes, Newport is at every board meeting and will answer any questions about what is happening at the school. Mr. Hawkes asked "do you partner with the school for hiring?" Yes, Newport helps the board hire a principal and assistant principal. Mr. Taylor asked "What the EMO is bringing to this board? What is the relationship between Ignite and Newport?" It was stated that Ignite will focus on board training. Newport will provide a fee based on student enrollment. Newport helps in the start up - building, staffing, the board has total control over the other providers at the school. Newport makes recommendations. The board sees how all funds are spent.</p> <p>Mrs. Turner asked "once the school opens, what will the EMO be doing day to day?" Newport will be supporting the school principal, providing strategic planning, supporting where the school wants to go, managing the overall finances.</p> <p>Mrs. Turner asked "In terms of curriculum, what services does the EMO provide?" Mrs. Carla Lovette stated that the board provides training, PD, and assists the school with teacher monitoring tools.</p>
<p><b>Application Interview</b></p>	<p>On March 10, 2015 the CSAB voted to not recommend this application to the SBE to start the planning year. The full CSAB vote was 11-0.</p> <p>Mr. Sanchez made a motion not to forward Forsyth Preparatory Academy to the Ready to Open process. Ms. Taylor seconded. The motion passed unanimously.</p>

Forsyth Preparatory Academy - Forsyth Preparatory Academy is dedicated to improving the lives of its students by providing authentic learning experiences in a collaborative, nurturing environment that will build a foundation for students success in school, career, and in life.

<b>OVERALL</b>	This application will not move forward to Ready to Open. The CSAB encourages them to reapply next year.
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