



**NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# FernLeaf Community Charter School

**Public charter schools opening the fall of 2015**

**Due by 5:00 pm, December 6, 2013**

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

### 2013 Application Process

To open a charter school in the 2015-2016 school year

#### APPLICATION DUE DATE/TIME

- September 6, 2013** A letter of intent to apply for the 2015-2016 school year **must** be received electronically to Deanna Townsend-Smith in the Office of Charter Schools **no later than 12:00 noon at deanna.townsend-smith@dpi.nc.gov**. If the Letter of Intent is not submitted, an application from this group will not be accepted. You can find the Letter of Intent requirements on the NC Office of Charter School web site.
- December 6, 2013** A complete online application package, in the Office of Charter Schools **by 5:00 pm.**
- December 13, 2013** A copy of the application due to the Local Education Agency in which the proposed charter school will reside in. Applicant must provide an attached PDF version as evidence to the Office of Charter Schools (i.e. signed letter).

#### APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline December 6, 2013 at 5:00 pm. **All applicants 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 as a FULL PDF document.
2. Review all elements of your application for completeness before submitting. **An incomplete application will result in the elimination of the application.**
3. Late submissions **will not** be accepted. No exceptions.
4. Provide confirmation electronically to the Office of Charter Schools to [deanna.townsend-smith@dpi.nc.gov](mailto:deanna.townsend-smith@dpi.nc.gov) that within seven (7) days the applicant has provided one full copy of the application to the LEA in which the proposed charter school will be located.

**TABLE OF CONTENTS**

I. APPLICATION CONTACT INFORMATION 5  
Grade Levels Served and Total Student Enrollment: 5

II. MISSION and PURPOSES 7  
Mission: 7  
Educational need and Targeted Student Population of the Proposed Charter School: 7  
Purposes of the Proposed Charter School: 9  
Goals for the Proposed Charter School: 11

III. EDUCATION PLAN 14  
Instructional Program: 14  
C  
K-5 Curriculum and Instructional Design: 15  
C  
6-8 Curriculum and Instructional Design: 18  
C  
Special Programs and "At-Risk" Students 21  
Exceptional Children 24  
Student Performance Standards 27  
Student Conduct: 29

IV. GOVERNANCE, OPERATIONS and CAPACITY 31  
Governance: 31  
Governance and Organizational Structure of Private Non-Profit Organization: 31  
Proposed Management Organization (Educational Management Organization or Charter Management Organization) 38  
Private School Conversions: complete 38  
C  
Projected Staff: 38  
Staffing Plans, Hiring, and Management 39  
Staff Evaluation and Professional Development 44  
Enrollment and Marketing: 47  
Marketing Plan 48  
Parent and Community Involvement 49  
Admissions Policy 50  
PROJECTED ENROLLMENT 2015-16 through 2019-2020 53  
Transportation Plan: 54  
School Lunch Plan: 54  
Civil Liability and Insurance 54  
Health and Safety Requirements: 55  
Facility:  
Facility Contingency Plan: 56

V. FINANCIAL PLAN  
Budget: Revenue Projections from each LEA 2015-16 58  
Total Budget: Revenue Projections 2015-16 through 2019-2020 59  
Personnel Budget: Expenditure Projections 2015-16 through 2019-2020 60  
Operations Budget: Expenditure Projections 2015-16 through 2019-2020 62  
Overall Budget: 64  
Budget Narrative: 64  
Financial Audits: 68

VI. AGREEMENT PAGE

LEA Impact Statement:\_\_\_\_\_70  
Applicant Signature:\_\_\_\_\_70

**I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: FernLeaf Community Charter School

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

Name of non-profit organization under which charter will be organized or operated: *FernLeaf Community Charter School*

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

Name of contact person: *Michael Luplow*

Title/Relationship to nonprofit: *Vice Chairperson*

Mailing address: 170 Allison Road  
Mills River NC 28759

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

E-Mail address: luplowm@gmail.com

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

County: HENDERSON

LEA: 450-Henderson County Schools

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

No: X

Yes:

Is this application being submitted as a replication of a current charter school model?

No: X

Yes:

What is the name of the nonprofit organization that governs this charter school? FernLeaf Community Charter School

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

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

Projected School Opening: Year 2015 Month August

Will this school operate on a year round schedule?

No: X

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

10

Years)

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,06	192
Second Year	K,01,02,03,06,07	288
Third Year	K,01,02,03,04,06,07,08	384
Fourth Year	K,01,02,03,04,05,06,07,08	432
Fifth Year	K,01,02,03,04,05,06,07,08	432
Sixth Year	K,01,02,03,04,05,06,07,08	432
Seventh Year	K,01,02,03,04,05,06,07,08	432
Eight Year	K,01,02,03,04,05,06,07,08	432
Ninth Year	K,01,02,03,04,05,06,07,08	432
Tenth Year	K,01,02,03,04,05,06,07,08	432

*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 and that the initial board members and I were regularly involved in the development of this application. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the non-profit organization.*

fernleaf  
*Signature*

Vice Chairperson  
*Title*

fernleaf  
*Printed Name*

12/04/2013  
*Date*

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### **Mission:**

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

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

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

### **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.*

Pursuant to North Carolina Law, any North Carolina student who meets Public School eligibility requirements will be eligible for admission. FernLeaf will not discriminate against potential students on any basis. In order to ensure a rich learning environment, a mandate of our mission, we will target a diverse student population that mirrors or exceeds the diversity present in the surrounding LEAs in Henderson and Buncombe Counties (see Appendix A for diversity analysis). Per FernLeaf's mission and House Bill 250, the board will develop specific strategies to ensure that enrollment reflects or exceeds the racial, ethnic, and economic composition of the local school systems.

FernLeaf will primarily serve any Henderson or Buncombe County family that desires a choice in their K-8 education and wishes to be a part of a small community oriented school - a school that emphasizes project based experiential learning in conjunction with a rich, integrated, balanced, and rigorous academic approach. While many parents are generally pleased with what the Henderson County Public Schools and neighboring Buncombe County Schools have to offer academically, parent meetings, student and teacher focus groups, and survey data suggest that there is a need for schools to do more than provide an academic foundation (see Appendix A). Among other things, parents desire a smaller setting where their children won't get lost in the educational process, will feel loved, and have a strong connection to their school community. They also wish to see an emphasis on non-academic subjects such as social-emotional learning and stewardship. Furthermore, they expressed a desire for their children to be met at their current academic level and to have opportunities to discover their unique passions and aptitudes. Students and teachers also expressed strong opinions which

have shaped FernLeaf's plans for how to serve the entire school community (see Appendix A).

FernLeaf's location will be in the northern section of Henderson County with reasonable proximity to the I-26 corridor. This location facilitates easy access for students from both Henderson and Buncombe counties and the larger population bases of Asheville, South Asheville, and Hendersonville. Currently, there is only one Charter School in Henderson County and the existing/proposed Charter Schools in Buncombe County predominantly serve areas to the north and do not serve students in the southern area surrounding our proposed location. The proposed location has a sufficient base of school-aged children in the area from which to attract a diverse student body (see Appendix A for census data) and provides easy access to the rich natural and cultural resources of the area. FernLeaf provides another choice for students on waiting lists at other area charter schools (see appendix A for waiting list data).

A K-8 student body was selected based on the rationale that this age group is among those who could most benefit from FernLeaf's approach. These formative years are filled with enormous growth, and our small setting and broad approach to curriculum implementation provide a rich backdrop to meet the needs of this diverse group.

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

FernLeaf's total projected enrollment beginning in the 4th year of operation is 432 students in grades K-8. It is expected that 70% of these students will come from the Henderson County Public Schools LEA representing 3.25% of their final K-8 ADM for 2012-2013, with the remaining 30% coming from the Buncombe County Schools LEA representing .73% of their final K-8 ADM for 2012-2013.

\*Figures based on Final ADM from DPI data for the 2012-2013 school year showing:

Henderson County Public Schools K-8 ADM = 9,304

Buncombe County Schools K-8 ADM = 17,783

<http://www.ncpublicschools.org/fbs/accounting/data/>

<http://www.ncpublicschools.org/docs/fbs/accounting/data/adm/2012-13fnladmml.d.xls>

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

FernLeaf's education plan has been crafted with strong input and leadership from current and former teachers from around the country who have worked in a variety of educational settings. It differs from that of the local LEAs in these four basic areas: curriculum implementation, focus and emphasis, school and class structure, and assessment.

Curriculum implementation moves beyond the traditional classroom based direct instruction found in the surrounding LEAs by employing a rich and varied project based experiential learning model that brings the Common Core



and NC Essential Standards to life for students, teachers, and the community. Blended with this are learning environments in which students learn content and receive instruction in formats tailored to their unique and individual needs. This combined approach facilitates true academic fluency where students not only acquire knowledge and content but are able to apply it in real world situations through project work.

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

School and class structure differ from the local LEA in terms of school logistics and physical infrastructure. FernLeaf utilizes flexible class scheduling and, where appropriate, facilitates multi-age learning environments. Strong teacher/student relationships are promoted by assigning teachers to work with students over a period of multiple years promoting long term relationships and accountability for both students and staff. The role of the physical environment in learning is emphasized and the school is designed to be warm and inviting, alive, and full of learning opportunities. The average size of Henderson County K-5 schools is 471 students with some above 500. The average size for 6-8 schools is 786 with half of them containing 900 students. With a K-5 size of 288 students and a 6-8 size of 144 at full capacity, FernLeaf is able to personalize school and create a sense of community that is not possible in the larger schools found in the local LEAs. This difference is especially important through the formative middle school years. The size difference also contributes to FernLeaf's ability to foster a healthy culture and strong sense of community within the school while reaching out to be a part of the broader community.

Lastly, FernLeaf takes a different approach to assessment than the local LEAs by using a comprehensive assessment strategy designed to meet the academic, intellectual, social, and personal needs of students. This strategy incorporates not just quantitative measures, but a wide variety of ongoing qualitative measures designed to help students and teachers form a more complete picture of student growth and development. Beyond the NCREADY accountability model and other nationally normed assessments (i.e. NWEA MAP test), our comprehensive strategy includes: a specially designed Mastery Learning Checklist for foundational skills in math, content specific narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and Personalized Learning Plans. Personalized Learning Plans address not only academic goals, but also a host of social, emotional, and developmental goals all contributing to high levels of success and well-being at school and beyond.

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

**Purposes of the Proposed Charter School:** *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC*

*charter school statute GS 115C-238.29A, and the proposed school's operations.*

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

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

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

FernLeaf's emphasis on maintaining a small community oriented school environment provides teachers with numerous professional opportunities not available in traditionally larger schools. They are able to form meaningful connections with students, their families, and the community, are able to effectively engage in comprehensive and purposeful collaboration with all school staff on behalf of students, and have the opportunity to develop a more personal and intrinsic investment in the school. Small size also results in teachers having opportunities to exercise multiple areas of professional strength by teaching within different disciplines and integrating subject matter.

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

Along with high quality professional opportunities comes a corresponding increase in teacher satisfaction, motivation, and investment - all leading to better educational opportunities for students, their families, and the community. Furthermore, by including teachers from other local schools on the Board of Directors, we are able to provide teachers outside of FernLeaf with opportunities to shape educational policy beyond the walls of the schools they work in.

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

Providing families with an additional choice in their public education is a fundamental tenet of FernLeaf's design. Existing public educational opportunities in the area are often one size fits all, and many students need a different environment in order to be successful. By maintaining a small community oriented school environment built around a project based experiential learning model, FernLeaf is able to provide parents and students with additional educational opportunities to help ensure the success of all students in the community.

6. Encourage the use of different and innovative teaching methods.

FernLeaf's utilization of a broad project based experiential learning model inherently encourages different and innovative teaching methods through the variety of approaches required to ensure projects and other learning opportunities are rich, relevant, and meaningful. Rooted in a culture of creativity and reflection, new methods for meeting the needs of students evolve naturally out of FernLeaf's instructional approach.

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

- 1. Provide specific and measurable student achievement performance goals for the school's educational program and the method of demonstrating that students have attained the skills and knowledge specified for those goals. Address how often and when the information will be communicated to the governing board and other stakeholders. These goals should include specific and measurable performance objectives over the first five years of the schools existence.*

#### Performance Goal 1:

Successful acquisition and application of skills and knowledge, evidenced by successful project completion, will result in 80% of internally developed project goals being met annually in each of the first five years of operation. Aggregate data will be provided to the board annually at the conclusion of each school year. Communication with parents and other stakeholders will occur on an ongoing basis via newsletters and the FernLeaf website.

#### Performance Goal 2:

80% of students who have been enrolled for more than 1 year will demonstrate growth as evidenced by results from external evaluations such as NWEA MAP testing (or other nationally normed assessments) and End of Grade tests. Aggregate data will be provided to the board annually at the conclusion of each school year for years 2-5 of operation after a baseline is established in year one (EOG results will be communicated as soon as they are available). Performance information will be communicated to parents and students on an ongoing basis through direct communication, conferences, etc. NC School report card data will be displayed prominently on the FernLeaf website for easy access by the broader community.

#### Performance goal 3:

80% of students will demonstrate growth on an annual basis over the first

five years of operation as evidenced by the addition of high quality artifacts to their individual portfolios. Data will be reported to the board annually by the School Director at the conclusion of each school year. Teachers and students will report portfolio development to parents on an ongoing basis through direct communication and conferences.

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

The FernLeaf board will know that the school is working toward attainment of its mission by continually monitoring the following fundamental tenets of our Mission Statement:

Providing access to a rich learning environment:

1) Annual student surveys reflecting that:

a) 80% report being challenged and interested in the educational content and activities being delivered.

b) 80% feel that they have access to a wide variety of educational offerings.

2) Annual monitoring of results from comprehensive school wide "audit" by board, School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

Ensuring academic fluency:

1) Annual reporting by the School Director of skill and knowledge acquisition measured by NCREADY EOG tests and NC Final Exams (formerly MSL), as well as growth evidenced by MAP testing (or other nationally normed assessment) and FernLeaf's Mastery Learning Checklist.

2) Ongoing project review through FernLeaf board participation in public displays of learning.

Encouraging the development and pursuit of individuals' unique passions and aptitudes:

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

Maintaining a strong sense of community within the school:

1) Annual student, parent, and staff surveys in which 80% of those surveyed describe feeling connected to the school community.

2) Annual staff turnover rate less than 10% (excluding extenuating personal circumstances unrelated to their experiences at FernLeaf).

3) Annual reporting of average daily school wide attendance rates of 90%.

4) Annual monitoring of results from comprehensive school wide "audit" by board, School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

Maintaining strong relationships with the broader community:

1) Ongoing monitoring of community attendance at public displays of learning  
2) Community survey responses after completion of service projects and other community interactions indicating 90% of those surveyed possess a favorable view of FernLeaf.

3) Annual monitoring of volunteer engagement with the school reflecting:

a) 80% of school's volunteer needs are being met.

b) 80% recidivism rate for new volunteers.

4) After graduation, significant numbers of former students will continue to participate in the FernLeaf Community annually through volunteer work, alumni groups, financial contributions, or other means.

Allowing students to become thoughtful, compassionate, and engaged:

1) Annual monitoring of the number, duration, and outcomes of community service projects undertaken.

2) After graduation, significant numbers of former students will continue to participate in the FernLeaf Community annually through volunteer work, alumni groups, financial contributions, or other means.

3) Annual monitoring of results from comprehensive school wide "audit" by board, School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

Promoting respect for surroundings, individuals, and the world as a whole:

1) Annual monitoring of results from comprehensive school wide "audit" by board, School Director, staff, and students taking into account all aspects of life at school and engagement with the broader community.

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

FernLeaf's instructional program is built upon a rich and varied experiential and project based learning model implemented in a small setting that engages the entire school community. Utilizing the Common Core and NC Essential Standards as a foundation, FernLeaf's program revolves around four main areas:

#### 1. Curriculum Implementation:

FernLeaf brings The Common Core and NC Essential Standards to life for all students through an experiential learning model that emphasizes project and place based learning as well as service learning. In this rich educational setting, learning is relevant, meaningful, and engaging. This approach and our small size provide flexibility in meeting the needs of all students through practical differentiated instruction and true curriculum integration. Beyond experiential learning, FernLeaf ensures all students have a strong academic skill set through the use of a Mastery Learning Model for foundational skills in math, small group instruction, and blended learning settings (online content delivery/instruction blended with teacher driven instruction).

#### 2. Expansive Focus and Emphasis:

Through access to a wide variety of subject matter and opportunities in a broad set of disciplines, FernLeaf students discover their unique passions and aptitudes while developing the wide range of skills and knowledge that will meet the unknown challenges of the future. FernLeaf balances and integrates traditional core academic subjects with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness.

#### 3. School and Class Structure:

FernLeaf's small size allows flexibility and the ability to adapt to the changing needs of the school community. FernLeaf utilizes flexible class scheduling to meet student needs and facilitates multi age learning environments through project work. Strong teacher/student relationships are promoted by assigning teachers to work with students over a period of multiple years promoting long term relationships and accountability for both students and staff.

#### 4. Assessment:

FernLeaf utilizes a comprehensive assessment strategy rooted in a culture of



reflection. This strategy incorporates a wide variety of ongoing quantitative and qualitative assessments designed to help students grow while providing continuous academic progress monitoring. In addition to the NCREADY accountability model and NWEA MAP testing (or other nationally normed assessment), our comprehensive strategy includes a specially designed Mastery Learning Checklist for foundational skills in math, content specific narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and Personalized Learning Plans. Personalized Learning Plans address not only academic goals, but also a host of social, emotional, and developmental goals all contributing to high levels of success and well-being at school and beyond.

Through the aforementioned approaches, FernLeaf's instructional program is designed to meet the needs of our target population - students and families who desire a choice in their K-8 education and wish to be a part of a small, community-oriented school that emphasizes project based experiential learning in conjunction with a rich, integrated, balanced, and rigorous academic approach. FernLeaf's instructional strategies have been developed by experienced and successful teachers in a range of disciplines and are supported by the existence of significant writings, research, theories, and concrete examples. A sampling of sources drawn from in the development of the instructional program are listed in Appendix T-1 and demonstrate that our approaches, in conjunction with skilled educators in the proper environment, allow us to provide opportunities for all students to learn and grow as a part of the FernLeaf community.

### **K-5 Curriculum and Instructional Design:**

*Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.*

FernLeaf's basic K-5 learning environment is a small, nurturing, familial setting with two classes per grade level and class sizes not to exceed 24 students. Class structures incorporate a variety of learning environments including project based experiential learning opportunities which regularly take students beyond the classroom and permit opportunities for multi-age collaboration with students in other grades. Additional learning environments include traditional classroom-based instruction, small group instruction, and blended learning opportunities (technology-assisted content delivery/instruction blended with teacher driven instruction). Blended learning is used more widely in grades 3-5 with grades K-2 having limited exposure to technology.

Provide a synopsis of the planned curriculum, including:

- 1. One sample course scope and sequence (preferably in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for the elementary division the school would ultimately serve.*
- 2. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

FernLeaf's curriculum aligns with its mission primarily in the manner in which the curriculum is implemented. As previously stated, implementation by way of an experiential learning model brings the Common Core and NC Essential Standards to life for all students by ensuring a rich learning

environment where the acquisition and application of knowledge and skills is relevant, meaningful, and engaging. By integrating traditional core academic subjects with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness, FernLeaf students are able to discover their unique passions and aptitudes in an engaged and supportive community. The use of a Mastery Learning Model for foundational skills in math is at the heart of ensuring that all students have a strong academic skill set upon which to draw in making connections between all of their learning.

It is through our approach to curriculum implementation (described in the Instructional Program section) that we are able to meet the needs of all students. This is consistent with our target population: any student who desires a choice in their K-8 education and wishes to be a part of a small community oriented school that emphasizes project based experiential learning in conjunction with a balanced, integrated, and rigorous academic approach.

FernLeaf's curriculum is based on the Common Core and NC Essential Standards allowing full compatibility with the NCREADY accountability model. Standardized assessments at the K-5 level include adherence to the NCREADY accountability model and include End of Grade tests and NCEXTEND 1&2 for students in grades 3-5. NC Final Exams (formerly Measures of Student Learning) are also used in grades 3-5 and are utilized in conjunction with the teacher evaluation component of the NCREADY model. FernLeaf also adheres to the State Board of Education's Policies on expected growth and K-2 assessment requirements (TCS-U-010 and GCS-C-016), and is accountable to the State's requirements for 3rd grade reading proficiency and promotion set forth in SB-337. The WIDA ACCESS Placement Test (W-APT) is used for identification of limited English proficient (LEP) students in Kindergarten through fifth grade. Students identified as LEP are administered the ACCESS for ELLs or the Alternate ACCESS for ELLs. In addition to the standardized assessments associated with the NCREADY model, FernLeaf also utilizes NWEA MAP testing (or other nationally normed assessments) to measure growth and proficiency.

3. *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.*

In pursuit of FernLeaf's mission, teachers are masters of a wide array of instructional strategies and approaches. To bring the Common Core and NC Essential Standards to life for all students, FernLeaf teachers are adept at short and long term project development, able to craft rich and engaging experiential lessons, and can effectively map skills and content to allow for true curriculum integration across disciplines. This requires teachers to have a thorough understanding of the entire curriculum, not just their specific area of expertise. They must also fully understand the Mastery Learning Model employed for foundational skills in math and be able to meet students at their current level by providing differentiated instruction for all students, including those identified as EC, ELL, and AIG. In order to effectively implement these varied strategies, teachers must also be comfortable working in a number of different instructional settings. These include individual, small, and large group settings as well as multi-age,



blended learning, and collaborative learning environments. These approaches provide students with opportunities for increased academic achievement by creating a rich, relevant, and meaningful learning environment that allows students to become academically fluent, thoughtful, compassionate, and engaged.

FernLeaf teachers possess a broad skill set allowing them to provide students with varied experiences in numerous disciplines. At the core of this skill set is the teacher's ability to teach, model, and integrate ways of learning, doing, and being. Research demonstrates that incorporating social emotional learning (SEL) throughout the curriculum allows children to perform better at school and in life. Aspects of SEL that FernLeaf teachers model and teach include self awareness, self management, relationship skills, responsible decision making, mindfulness, work ethic, etc. FernLeaf teachers play varied and complex roles in the lives of their students including, but not limited to, mentor, confidant, and partner in a shared experience and community. On the other end of the spectrum, FernLeaf teachers have a keen ability to simply make learning fun. This is an important part of what engaging children is all about.

Teachers are also masters of numerous instructional strategies related to FernLeaf's comprehensive assessment approach. They are able to drive instruction through ongoing formative assessment and are able to engage students in summative assessment practices without allowing them to become the end in themselves. They also implement qualitative assessments in addition to quantitative assessments to help students develop a clear picture of their learning, their place within the school community, and their role within the broader world. Teachers utilize FernLeaf's Mastery Learning Checklist both formally and informally to ascertain the individual needs of all students in math and to enable them to plan effective learning experiences. FernLeaf's culture of reflection is encouraged through modeling, but also by guiding students in the creation of self assessment measures and the development of student portfolios. Narrative assessments allow teachers to reflect on every student and to provide themselves, students, parents, and other teachers with a nuanced look at student growth that captures much of what is missed in traditional assessment methods.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

FernLeaf's academic calendar for the 2015-2016 school year (see appendix C) provides for 1,148 hours of instruction based on a 7.25 hour full school day and a 4 hour early release day. FernLeaf regards each and every hour of the day as instructional time as our mission dictates that we capitalize on the rich opportunities for student growth and understanding present in all school activities. This includes times not traditionally considered instructional i.e. lunch and recess. To ensure that instructional hours are consistent with the law however, FernLeaf has taken into consideration that our daily instructional hours could be considered to equal 6.5 hours per day. Using this in calculating total hours, students are receiving 1,044 hours of instruction, still above the 1,025 minimum.

The calendar is a variation on the traditional calendar found in the area LEAs and is designed to balance the needs of students, parents, teachers, and the community. It facilitates long and short term project undertakings, provides continuity in the learning process, provides teachers with adequate time for planning and professional development, and is sensitive to the practical needs of children and their families. Instructional time lost due to inclement weather will be made up by converting early release days to full days, teacher work days to student days, or by shortening intersession breaks and/or extending the last day of school.

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

August 3rd-6th, 2015: Teacher Workdays/Staff Development  
August 7th, 2015: First day of school  
August 28th, 2015: Teacher Workday/Staff Development  
September 7th, 2015: Labor Day (no school)  
September 25th, 2015: Teacher Workday/Staff Development  
October 12th-16th, 2015: Fall Intersession Break  
October 30th, 2015: Teacher Workday/Staff Development  
November 11th, 2015: Veterans Day (no school)  
November 25th-27th, 2015: Thanksgiving Holiday (no school)  
December 21st, 2015 - January 8th, 2016: Winter Holiday/Intersession Break  
January 18th, 2016: Martin Luther King, Jr. Day (no school)  
January 29th, 2016: Teacher Workday/Staff Development  
February 26th, 2016: Teacher Workday/Staff Development  
March 21st - April 1st, 2016: Spring Intersession Break  
April 29th, 2016: Teacher Workday/Staff Development  
May 27th, 2016: Teacher Workday/Staff Development  
May 30th, 2016: Memorial Day (no school)  
June 7th, 2016: Last day of school  
June 8th-10th, 2016: Teacher Workdays/Staff Development

### **6-8 Curriculum and Instructional Design:**

*Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure.*

FernLeaf's basic 6-8 learning environment is similar to that of the K-5 environment in that it retains a small, nurturing, familial setting with two classes per grade level and class sizes not to exceed 24 students. The overarching characteristics however, begin to shift in these grades to incorporate an increase in developmentally appropriate personal responsibility and accountability. Class structures are also very similar to those found in K-5. Project based experiential learning opportunities continue to regularly take students beyond the classroom and permit opportunities for multi-age collaboration, but they begin to demand a greater level of student independence and self direction than in K-5. Traditional classroom-based instruction and small group instruction continues as well, but blended learning opportunities (technology assisted content delivery/instruction blended with teacher driven instruction) are incorporated to a greater degree.

Provide a synopsis of the planned curriculum, including:

1. ***One sample course scope and sequence (preferably in graph form) in the Appendices***

*(Appendix B1) for one core subject (specific to the school's purpose) for the middle school division the school would ultimately serve.*

*2. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

As a result of our approach to curriculum implementation described in the Instructional Program section of the application, the 6-8 curriculum aligns with FernLeaf's mission in the same manner as described above for K-5. The Common Core and NC Essential Standards are brought to life for students of all ages through the implementation of an experiential learning model where the acquisition and application of knowledge and skills is relevant, meaningful, and engaging. Through the integration of core academics with social-emotional learning, stewardship, the arts, entrepreneurship, foreign language, and comprehensive health and wellness, students are afforded the opportunity to realize their unique passions and aptitudes in an engaged and supportive community.

Our targeted student population is any student who desires a choice in their K-8 education and wishes to be a part of a small community oriented school that emphasizes project based experiential learning in conjunction with a balanced, integrated, and rigorous academic approach. The variety present in our approach to curriculum implementation allows us to meet the needs of all students, consistent with our target population.

Based on the Common Core and NC Essential Standards, FernLeaf's curriculum is fully compatible with the NCREADY accountability model. Standardized assessments at the 6-8 level include adherence to the NCREADY accountability model and include End of Grade tests, 8th grade Math I End of Course test (formerly Algebra I), 8th Grade ACT EXPLORE, and NCEXTEND 1&2. NC Final Exams (formerly Measures of Student Learning) are utilized in conjunction with the teacher evaluation component of the NCREADY model for all content areas for which they have been established. Identification of limited English proficient (LEP) students is achieved with the WIDA ACCESS Placement Test (W-APT), and those identified as LEP are administered the ACCESS for ELLs or the Alternate ACCESS for ELLs. In addition to the standardized assessments associated with the NCREADY model, NWEA MAP testing (or other nationally normed assessments) is used to measure growth and proficiency.

*3. 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.*

The instructional strategies for grades 6-8 that FernLeaf expects its teachers to master are identical to those previously described in the K-5 Curriculum and Instructional Design section above with the exception that the Mastery Learning Model for math is no longer utilized.

In pursuit of FernLeaf's mission, teachers are masters of a wide array of instructional strategies and approaches. To bring the Common Core and NC Essential Standards to life for all students, FernLeaf teachers are adept at short and long term project development, able to craft rich and engaging experiential lessons, and can effectively map skills and content to allow for true curriculum integration across disciplines. This requires teachers to have a thorough understanding of the entire curriculum, not just their

specific area of expertise. They must also be able to meet students at their current level by providing differentiated instruction for all students, including those identified as EC, ELL, and AIG. In order to effectively implement these varied strategies, teachers must also be comfortable working in a number of different instructional settings. These include individual, small, and large group settings as well as multi-age, blended learning, and collaborative learning environments. These approaches provide students with opportunities for increased academic achievement by creating a rich, relevant, and meaningful learning environment that allows students to become academically fluent, thoughtful, compassionate, and engaged.

FernLeaf teachers possess a broad skill set allowing them to provide students with varied experiences in numerous disciplines. At the core of this skill set is the teacher's ability to teach, model, and integrate ways of learning, doing, and being. Research demonstrates that incorporating social emotional learning (SEL) throughout the curriculum allows children to perform better at school and in life. Aspects of SEL that FernLeaf teachers model and teach include self awareness, self management, relationship skills, responsible decision making, mindfulness, work ethic, etc. FernLeaf teachers play varied and complex roles in the lives of their students including, but not limited to, mentor, confidant, and partner in a shared experience and community. On the other end of the spectrum, FernLeaf teachers have a keen ability to simply make learning fun. This is an important part of what engaging children is all about.

Teachers are also masters of numerous instructional strategies related to FernLeaf's comprehensive assessment approach. They are able to drive instruction through ongoing formative assessment and are able to engage students in summative assessment practices without allowing them to become the end in themselves. They also implement qualitative assessments in addition to quantitative assessments to help students develop a clear picture of their learning, their place within the school community, and their role within the broader world. FernLeaf's culture of reflection is encouraged through modeling, but also by guiding students in the creation of self assessment measures and the development of student portfolios. Narrative assessments allow teachers to reflect on every student and to provide themselves, students, parents, and other teachers with a nuanced look at student growth that captures much of what is missed in traditional assessment methods.

4. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
5. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

The FernLeaf academic calendar coincides with the tenets of the proposed mission and education plan for grades 6-8 in the same manner as was previously described in the K-5 Curriculum and Instructional Design section above.

FernLeaf's academic calendar for the 2015-2016 school year (see appendix C) provides for 1,148 hours of instruction based on a 7.25 hour full school day

and a 4 hour early release day. FernLeaf regards each and every hour of the day as instructional time as our mission dictates that we capitalize on the rich opportunities for student growth and understanding present in all school activities. This includes times not traditionally considered instructional i.e. lunch and recess. To ensure that instructional hours are consistent with the law however, FernLeaf has taken into consideration that our daily instructional hours could be considered to equal 6.5 hours per day. Using this in calculating total hours, students are receiving 1,044 hours of instruction, still above the 1,025 minimum.

The calendar is a variation on the traditional calendar found in the area LEAs and is designed to balance the needs of students, parents, teachers, and the community. It facilitates long and short term project undertakings, provides continuity in the learning process, provides teachers with adequate time for planning and professional development, and is sensitive to the practical needs of children and their families. Instructional time lost due to inclement weather will be made up by converting early release days to full days, teacher work days to student days, or by shortening intersession breaks and/or extending the last day of school.

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May 30th, 2016: Memorial Day (no school)  
June 7th, 2016: Last day of school  
June 8th-10th, 2016: Teacher Workdays/Staff Development

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

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

FernLeaf's use of school wide supports and resources such as individual and small group tutoring, mentor relationships, Personalized Learning Plans, and



student led conferences serve to meet each student's unique educational needs. Student assessment tools such as the FernLeaf Mastery Learning Checklist, NWEA MAP testing (or other nationally normed assessment), EOG tests, and NC Final Exams (formerly Measures of Student Learning) also serve as helpful tools in monitoring student success. Together, these supports and assessment resources allow teachers to closely monitor student learning. Individual needs are met on a daily basis in learning environments where students can progress through the curriculum at their own pace. As foundational skills in math are acquired, their progression is tracked through the use of the Mastery Learning Checklist permitting a complete picture of students strengths and weaknesses. Furthermore, our small school setting permits a great deal of flexibility in scheduling to meet the individual needs of students. This small size also makes it possible to keep all students engaged making it more difficult for them to "fall through the cracks". Our Education Plan in general permits teachers to facilitate a diverse set of learning environments through project work, blended learning settings, and small group instruction all designed to make sure the needs of all students are being met.

In circumstances where student learning concerns arise, FernLeaf will utilize a student support review process to identify problem areas or deficits. Initially, classroom based interventions will be developed as a part of the student's Personalized Learning Plan. This plan is created through a collaborative conference including the student, a parent or guardian, and the relevant teacher or teachers. If these interventions do not produce significant improvements in the areas of concern, a student support team made up of teachers, support staff, and an administrator will develop personalized, data driven, and research-based intervention strategies. These interventions will be monitored through regular data collection and revised as necessary to provide the most effective supports possible for students. If continued interventions do not prove beneficial to the academic progress of the student, further screening and evaluation will be considered and additional strategies will be developed and implemented.

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

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

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

a) Methods for identifying ELL students:

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

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:

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

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

In addition to initial WIDA ACCESS Placement Testing, students will participate in annual ACCESS testing for ELLs to continue to assess and guide interventions. All FernLeaf students' progress will be monitored through the use of NWEA MAP testing (or other nationally normed assessment) and the Mastery Learning Checklist. Personalized Learning Plans will be revised and updated accordingly. FernLeaf is committed to providing the highest quality supports and services to students and will follow all state guidelines for placement, services, and exit standards based upon assessment/evaluation data.

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.*

a) Specific instructional programs, practices, strategies, and opportunities

the school will employ or provide to enhance their abilities:

The needs of students who excel academically will be met through the use of instructional strategies such as experiential learning, blended learning, project based learning, and small group instruction. These flexible strategies allow academically strong students to be challenged in a way that is specifically geared toward their individual needs. The use of the Mastery Learning Checklist for math skills enables teachers to closely monitor student strengths and areas of accelerated learning. When a student demonstrates exceptional abilities their teachers will provide them with challenges above and beyond those of their peers through substantial differentiated instruction.

b) Plans for monitoring and evaluating the progress and success of intellectually gifted students:

Academically strong students will be evaluated in the same manner as all FernLeaf students. This involves the use of NWEA MAP testing (or other nationally normed assessment), the Mastery Learning Checklist, student portfolio monitoring/evaluation, narrative assessments, and all components of the NCREADY model described in the Instructional Program section.

### **Exceptional Children**

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

### **Identification and Records**

1. *Explain how you will identify students who are enrolled within the charter school that have 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. FernLeaf will identify previously identified Exceptional Children and 504 students by initially asking parents and guardians to identify this information during the initial registration process. Once a student has been enrolled, with the consent of the parent or guardian, the appropriate records will be requested from the student's previous school.

2. FernLeaf will utilize a Student Support Team made up of grade level teachers, administrators, and EC staff to identify, screen, assess, and plan for all struggling students. With regard to the federal Child Find mandate,



FernLeaf will do everything in its power to identify and support students with disabilities. When a teacher or faculty member initially identifies an area of concern for a student, the teacher, student, and parent/guardian will conference to review the student's Personalized Learning Plan. Existing interventions and academic supports will be reviewed and adjustments will be made based on the most recent concerns, data, and observations of the student. Relevant goals will be set and progress will be closely monitored using nationally normed probes. If those initial classroom adjustments do not prove successful, the student will be reviewed by the Student Support Team for continued screening and evaluation. The Student Support Team will work with the teacher, student, and parent/guardian to develop additional targeted research-based interventions, conduct basic screenings and observations, and gather relevant information pertaining to the student's abilities. These targeted interventions will be progress monitored for a designated period of time. If these interventions, screenings, observations, and student information do not satisfy the student's needs, further evaluations will be considered. All FernLeaf student evaluations and assessments will be completed by qualified professionals according to the EC Identification Requirements put forth by NCDPI. These qualified professionals will either be FernLeaf faculty members or contracted professionals.

3a) Requesting Records from previous schools:

When a child transfers into FernLeaf with an existing IEP or 504 Accommodation plan, those records will promptly be requested from the student's previous school. The identified student's parent or guardian will be asked to sign a release of records form that will be used to obtain these records. The request will be faxed to the previous school and a follow-up phone call will be used as needed.

3b) Record Confidentiality (on site):

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

3c) Record Compliance (on site):

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

**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. Students with disabilities will be provided with individualized programs and supports implemented in accordance with state policies and procedures. An EC teacher is provided for in the budget for the first year of operation with an additional EC teacher added in year 4. EC staff is available to work with students one on one, in small group settings, in classrooms, and as a consultant. EC teachers will work closely with students and other teachers to ensure all students with disabilities are being supported. Testing and other therapeutic needs not met internally, will be met through outsource contracts and/or additional hiring as necessary and feasible. FernLeaf will make every effort to meet the needs of EC students in the least restrictive environment. The strategies being implemented to meet the diverse needs of all FernLeaf students will serve also to support those with disabilities and other unique learning needs. Experiential, blended, project based, small group, and other learning environments and strategies implemented in a variety of settings are all school wide supports that will be tailored to meet the needs of any student with a disability or unique learning difference.

2. Students with disabilities will be guaranteed a Free and Appropriate Public Education through the use of a thorough and clear system of screening, assessment, and monitoring in addition to the use of a variety of education delivery models. FernLeaf's flexible learning model offers individualized and differentiated instruction for all students. Diverse learning settings which employ a variety of instructional methods where teachers are focused on the individual needs of each student will also facilitate meeting the needs of exceptional students. Student growth and achievement will be closely monitored through the use of NWEA MAP testing (or other nationally normed assessments), the Mastery Learning Checklist, Personalized Learning Plans, formative assessments, teacher observation, mentor meetings, and conferences involving the student, parent, and teacher. Additionally, the process of reviewing each student's Personalized Learning Plan will provide key insight into student needs. When difficulties or struggles are noted, a conference including the student, parent/guardian, and the teacher will be held. The student's Personalized Learning Plan will be reviewed and strategies will be developed to assist the student in their area of difficulty. Interventions will be provided on a consistent basis and progress data will be collected. Following this period of interventions, progress will be reviewed. At that time, interventions will either be revised, continued, or a referral to the Student Support Team for further screening or assessment will be discussed.

3. Exceptional Children staff will work closely with faculty members, parents, and identified students on the development and implementation of quality Individualized Education Plans. Meetings and ongoing collaboration with parents, teachers, and the identified student will take place to ensure the effectiveness of the plan. Parents, and when appropriate, students, will be included in meetings and discussions regarding placement and

services. Annual and other necessary IEP reviews or addendum meetings will also be held in accordance with the law. The School Director or their designee will oversee the implementation of these guidelines and assure that the needs of all EC students are met.

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

## **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.

Student performance standards are based upon FernLeaf's established school wide performance goals which include:

### Performance Goal 1:

Successful acquisition and application of skills and knowledge, evidenced by successful project completion, will result in 80% of internally developed project goals being met annually in each of the first five years of operation. Aggregate data will be provided to the board annually at the conclusion of each school year.

### Performance Goal 2:

80% of students who have been enrolled for more than 1 year will demonstrate growth as evidenced by results from external evaluations such as NWEA MAP testing (or other nationally normed assessments) and End of Grade tests. Aggregate data will be provided to the board annually at the conclusion of each school year for years 2-5 of operation after a baseline is established in year one (EOG results will be communicated as soon as they are available). Performance information will be communicated to parents and students on an ongoing basis through direct communication, conferences, etc. NC School report card data will be displayed prominently on the FernLeaf website for easy access by the broader community.

### Performance goal 3:

80% of students will demonstrate growth on an annual basis over the first five years of operation as evidenced by the addition of high quality artifacts to their individual portfolios. Data will be reported to the board annually by the school director at the conclusion of each school year. Teachers and students will report portfolio development to parents on an

ongoing basis through direct communication and conferences.

2.

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

Rooted in a culture of reflection, FernLeaf's comprehensive assessment strategy incorporates a wide variety of ongoing quantitative and qualitative assessments designed to help students grow while providing continuous academic progress monitoring. In addition to state and federally mandated tests, our strategy includes the use of NWEA MAP testing (or other nationally normed assessment) for a variety of grade levels and subjects. These, or other adaptive achievement tests provide teachers with valuable data allowing them to differentiate instruction based on the direct needs of individual students. FernLeaf's comprehensive assessment strategy also includes a specially designed Mastery Learning Checklist for foundational skills in math, content specific narrative assessments, student portfolios demonstrating a wide range of skills and understanding, technology based assessments, and Personalized Learning Plans. Personalized Learning Plans address not only academic goals, but also a host of social, emotional, and developmental goals all contributing to high levels of success and well-being at school and beyond. Collection and analysis of data from these varied sources allows FernLeaf to reflect on every student and to provide them, their parents, and other stakeholders with a clear and nuanced look at student growth and achievement.

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

3.

In order to be promoted to the next grade level, students in grades K-2 must demonstrate proficiency through a variety of FernLeaf developed assessments in accordance with SBE Policy GCS-C-016 regarding K-2 assessments. Recommendations will be made by a retention/promotion committee based upon review of student portfolios, teachers' narrative assessments, progression on the Mastery Learning Checklist, student progress in meeting Personal Learning Plan Goals, and meeting attendance standards developed by the Board of Directors. Students in grades 3-8 will be considered for promotion/retention in the same manner as those in K-2, but 3rd graders must also meet state requirements for 3rd grade reading proficiency and promotion set forth in SB-337. Students with special needs will be considered for promotion in the same fashion as all other students, with additional

considerations related to these students' IEPs, 504 Plans, LEP status, specific disabilities, and any other relevant factors. The final determination for the promotion or retention of all students shall be made by the School Director in accordance with all applicable laws and in consultation with relevant stakeholders.

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

4.

FernLeaf's exit standards are consistent with our promotion policies and standards as noted above in question three. Students in the 8th grade are expected to demonstrate the successful acquisition and application of knowledge and skills set forth in the Common Core and NC Essential Standards for 8th grade. Exit standards for "At-Risk" students are the same as for other students with additional considerations related to these students' IEPs, 504 Plans, LEP status, specific disabilities, and any other relevant factors.

### **Student Conduct:**

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

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

*Be sure to include:*

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

Student Conduct will be governed in a way that is thoughtful, compassionate, and respectful of the entire FernLeaf Community. Consistent with the school's mission, students will be actively engaged and connected to a community of caring adults and peers enabling them to learn and grow both academically and socially while contributing to a positive and healthy school environment. Research demonstrates that incorporating Social Emotional Learning (SEL) throughout the curriculum allows children to perform better at school and in life. Aspects of SEL that FernLeaf models, teaches, and integrates include: self awareness, self management, relationship skills, responsible decision making, mindfulness, work ethic, etc. FernLeaf's policies related to student conduct are designed to be

clear, logical, and fair, and to provide opportunities for student growth and learning. An initial draft handbook containing policies related to discipline practices, suspension and expulsion, students with disabilities, due process, and grievance procedures can be found in Appendix D. The Board of Directors and School Director will continually develop and revise a comprehensive handbook addressing all aspects of the FernLeaf Community prior to the school's opening. All policies and procedures will be developed in accordance with applicable law.

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



**IV. GOVERNANCE, OPERATIONS 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 by the final approval interview date.

*Name of Private Nonprofit:* FernLeaf Community Charter School

*Mailing Address:* 170 Allison Road

*City/State/Zip:* Mills River NC 28759

*Street Address:* 170 Allison Road

*Phone:* 828-606-6846

*Fax:* 828-698-6553

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

*FEDERAL TAX ID:* 46-2892902

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

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

Yes (copy of letter from federal government attached: Appendix E)  
 No

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

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

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

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

<b>Board Member Name</b>	<b>Board Title</b>	<b>County/State of Residence</b>	<b>Current Occupation</b>
James Robertson	Chairperson	BUNCOMBE	Coordinator

Elliot III			Oper. & Maint. - Evergreen Packaging
Katie Cavert Ferrell	Secretary	BUNCOMBE	Program Director, NC Green Schools
Teresa Walton	Director	HENDERSON	Nurse
Colette Summitt	Director	HENDERSON	Retired Teacher
Michael Luplow	Vice Chairperson	HENDERSON	Orchestra Director. Owner - RhodoWood Basses
Jennifer Wadsworth Love	Director	HENDERSON	Pre-K Teacher/Parent
William Deaver III	Director	HENDERSON	Owner - Trademark Homescapes
Barbara Barfield	Treasurer	HENDERSON	Teacher

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

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

FernLeaf Community Charter School will be governed by a board of directors numbering from 5 - 15 with elected officers consisting of chairperson, vice-chairperson, secretary, and treasurer. The role of the Board of Directors includes:

- \*Determining the operating and educational program policies that result in academic success and are consistent with the school's mission and vision.
- \*Overseeing the fiscal operation of the school, eliminating risk, and ensuring prudent financial management.
- \*Ensuring that the charter school fulfills its charter agreement with the state and follows all applicable regulations.
- \*Overseeing fundraising and procuring donated resources from the community.
- \*Hiring, supervising, and evaluating the School Director.
- \*Acting as employer to all staff.
- \*Developing strategic plans for the school's future.
- \*Completing an annual self assessment of the board's performance.

The day to day operation of the school will be delegated to a School Director who is hired and evaluated by the Board of Directors, and who is an ex officio non-voting member of the Board of Directors. The School Director is the only employee directly supervised by the board.

The board will recruit and appoint the School Director through traditional recruiting methods. The individual must possess strong leadership skills and charismatic energy. They must also be respectful of individual differences, and through implementation and ongoing management, be able to see the school's vision through. A criminal background check in accordance with G.S. 115C-238.29K and North Carolina State Board of Education Policy TCS-U-002 will be conducted for the School Director and will be completed



prior to final approval of the applicant for the position. The School Director attends monthly board meetings to provide data and feedback on the operations of the school, and to receive direction and feedback from the board. The School Director will deliver a monthly report at each regularly scheduled board meeting. This will include key indicators of academic progress and success, financial and operational data, and other items requested by the board or deemed relevant by the School Director. The board will conduct an evaluation of the School Director's performance and will complete this assessment in April of each year. The evaluation instruments utilized will include the North Carolina School Executive Evaluation for Principals. The board will also solicit feedback and input from parents, teachers, and students about the school's performance, the Board of Director's performance, and the School Director's role through a survey process that will occur at different times throughout the year as outlined in the board's strategic calendar (Board Policies Appendix J pages 16-18).

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The current board of eight brings experience necessary to guide FernLeaf's success. Founding board members include:

- \*Teachers with extensive classroom and school leadership experience
- members of the local business community who want to improve their community.
- \*Parents interested in creating an educational option consistent with FernLeaf's mission.
- \*Business people with experience preparing and reviewing budgets, balance sheets, and general ledger reports.
- \*Bilingual individual able to reach out to Hispanic families.
- \*Business people with experience hiring and managing human resources.
- \*Community members with an interest in protecting the ecological landscape of the region.
- \*Individuals with previous board experience.
- \*Individuals with interest and experience in sustainability.
- \*Health services provider familiar with public and private services.
- \*Individuals with experience in the service industry.

There is still a need to recruit individuals with legal and accounting expertise and the board is pursuing a slate of potential candidates in these fields.

Duties and powers of the board are discussed in the Bylaws excerpted below: Specifically, the duties of the the Board of Directors shall include, but shall not be limited to the following:

- a. Perform any and all duties imposed on them collectively or individually by law, by the articles of incorporation, or these bylaws;
- b. Meet at such times and places as required by these bylaws;
- c. Register their addresses, telephone numbers, and email addresses with the secretary of the corporation, and notices of meetings delivered by these means shall be valid notices thereof;
- d. Appoint, remove, and supervise all officers of the corporation;
- e. Appoint and remove, employ and discharge, and except as otherwise provided

in these bylaws, prescribe the duties and fix the compensation of the School Director who shall serve as an ex officio non-voting member of the Board of Directors;

f. Establish governance policies that uphold North Carolina Public Charter School law and promote the mission and goals of the school;

g. Recommend priorities and short-term and long-term plans to the School Director;

h. Build and maintain partnerships with all community stakeholders and assume a leading role in promotion of and fundraising for the school.

The activities and affairs of this corporation shall be conducted and all corporate powers shall be exercised by or under the direction of the Board of Directors. The board acts as one unit and all matters of the corporation are determined by resolution according to the bylaws. No individual Director may speak or act for the corporation without authorization. The board, except as otherwise provided in the bylaws, may by resolution authorize any officer or agent of the corporation to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances. Unless authorized, no officer, agent, or employee shall have any power or authority to bind the corporation by any contract or engagement, or to pledge its credit or to render it liable monetarily for any purpose or in any amount.

The board's diverse experience and skill set will be a valuable asset in hiring the School Director and evaluating their success in the following areas:

\*Meeting goals for academic growth and student social, physical, and emotional development.

\*Contributing to the community in relevant ways that have a positive impact on students and families, the community, and the environment.

\*Management of the school's finances.

\*Implementation of employment policies.

\*Implementation of practices that further the school's mission.

\*Meeting student, parent, and staff expectations.

In addition to the board's varied expertise and experience, Fernleaf's school structure allows for input from all stakeholders through four advisory committees of teachers, students, parents, and community members.

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?*

An initial group consisting of teachers, parents, and community members was organized by two local educators Michael and Molly Luplow. Bimonthly meetings were held to explore the need for and feasibility of opening a new charter school as well as to develop the mission and vision for the school. This group identified possible founding board candidates from within the group as well as from within the local community. A board member experience matrix was created and helped to identify areas in which the board needed additional expertise (Appendix T2). People known to members of the original group were then approached to determine their level of interest in becoming a board member. A potential board member information packet was developed and distributed to candidates about the role and commitment required of a

FernLeaf board member. Additional information was provided to these candidates as needed. When a candidate expressed interest they were initially screened in individual meetings, and those who possessed the experience, expertise, and commitment needed to create a well rounded board were invited to become a founding board member.

The current eight member board recognizes that there is still a need to recruit individuals with legal and accounting expertise, and would like to fill these roles as soon as possible. Additional board members, including parents and local community leaders, may be added if they would enhance the board's role. If a position becomes vacant, the board will actively recruit a replacement based upon the current needs and composition of the remaining members. If a vacancy leads to board membership dropping below the minimum number of five, the board will find a replacement per Article 3 Section 16 of the bylaws within 30 days.

Pursuant to the FernLeaf Bylaws Article 3 Section 5: Directors shall hold office for a period of three (3) years and until his or her successor assumes office. Directors may hold office for a maximum of three (3) successive terms with each new term requiring a majority vote of the Board of Directors. Directors may hold office for a period of less than three (3) years in order to implement staggered terms. Staggered terms may be implemented by dividing Directors into two groups as follows: Group 1 Directors, whose terms expire at the end of the Annual Meeting of the Board of Directors in odd-numbered years; and Group 2 Directors, whose terms expire at the end of the Annual Meeting of the Board of Directors in even-numbered years. The number of Directors in each group will be determined from time to time by the Board of Directors.

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

The board will meet monthly. See Appendix J-16 for detailed strategic calendar.

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

Board training is seen as one of the major keys to the success of FernLeaf, therefore training will begin after an individual has expressed an interest in serving on the FernLeaf board. Orientation to the board prior to being elected as a director consists of two steps:

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

2. A meeting with key board members will occur to go over the responsibilities and expectations of the Board of Directors and to answer any questions the prospective board member may have.

The purpose of these initial steps is to ensure that the individual has a good understanding of the responsibilities a Director accepts upon becoming a board member. After the individual is elected to the board, the new Director will be paired with an existing board member who will act as a

mentor during the first year of his or her term. The mentor is responsible for helping the new member with any questions about materials, logistics, or other information related to the board.

Board members will be expected to participate in all training deemed critical during the planning year after preliminary approval has been granted. This will include training provided by the state DPI and/or Board of Education relevant to charter schools. The initial board will be responsible for considering and requiring other professional development that may be necessary to ensure the success of the school. This might include training about the legal aspects of running a charter school such as open meetings, minutes of the meetings, finance, State Board of Education directives, education codes, as well as training in the role each board member has in their oversight of the school. Board members will be expected to attend trainings in a timely and attentive manner.

After the initial school start up period, the Board of Directors will incorporate regular training into their monthly meetings at least once per quarter. During the annual self review, the board as a whole will identify areas of professional development that would be beneficial to its growth and performance during the upcoming year.

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

Upon appointment (election) to the FernLeaf Board of Directors, each individual will sign an agreement to disclose any conflict of interest to the board or board committee. A written disclosure will also be required annually from each board member at the start of the fiscal year. New disclosures that are needed during the course of business during the year will be noted in the minutes of the meeting in which the disclosure was made along with the discussion and results of the decision as to whether a conflict does exist. The procedure is outlined at length in Article 10 of the FernLeaf Bylaws (Appendix H) which contains the full Conflict of Interest Policy. Each member has a duty to disclose any conflict of interest (defined in Article 10 Section 2b) and will be given the opportunity to present all material facts to the non-interested members of the board or board committee. Discussion of and determination of the existence of a conflict will be made without the interested party present. Decisions regarding compensation to an interested party on the board also exclude the interested party from the discussion and voting decision. The Bylaws (Article 10 Section 3c) are specific in outlining the procedure if a board member neglects to disclose their interest in a matter, and while the interested board member may give explanation as to why they did not disclose, it is up to the board (excluding the interested Director) to determine if disciplinary action is required for the Director's failure to report his/her interest. Board members may be removed by action of the Board of Directors according to Article 3 Section 16 and Section 14.

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

The FernLeaf Board of Directors may form committees and sub-committees to draft school policies, including board policies, employment policies, and student conduct policies. Draft policies will continue to be developed and adopted as we move through the planning year by committees and subcommittees

established by the board. Committees will research the policy by consulting federal and state laws as well as State Board of Education and DPI policies. Legal advice will be obtained if necessary. Draft policies or changes to existing policies will be scrutinized to ensure consistency with the FernLeaf mission. Drafts will be distributed to board members before the next monthly board meeting, discussed at the next meeting, and all changes or new policies must be adopted by a resolution of the Board of Directors according to the FernLeaf Bylaws.

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

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

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

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

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

The grievance procedure is the method where grievances of parents or staff will be resolved fairly and effectively according to the school mission and policies of the FernLeaf Community Charter School Board of Directors. No retaliation shall be taken against any individual filing a grievance. A grievance may be filed when facts show that an individual has been treated in a manner that is contrary to FernLeaf board policy, FernLeaf Employment Policies, or the FernLeaf Student Code of Conduct. With the exception of the accusation of a criminal act or breach in the Employee Code of Ethics by the School Director, all grievances will be handled by the School Director according to the following sequential steps and guidelines:

1. The School Director should ensure that an informal resolution has been attempted.
2. A meeting documented by the School Director is held in an attempt to resolve the grievance.
3. The aggrieved party completes a formal written grievance form and presents it to the School Director who will deliver a copy to the Executive Committee of the Board of Directors for review. The written grievance form must be filed within seven days of the previously documented meeting. If



the grievance involves a staff member, a copy of the written grievance is placed in the employee's personnel file.

4. The Executive Committee of the Board of Directors will review the grievance and it will be read and considered by the entire Board of Directors at the next meeting of the board, in closed session if deemed necessary for the preservation of confidentiality. The parties may be invited to the next Board of Directors meeting to provide input necessary for the board to make a decision. If necessary, legal consultation will be obtained. The board will advise the School Director on the resolution of the grievance.

5. The School Director advises the parties involved of the final decision within seven days following the decision of the Board of Directors.

**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, if available. If not available, this document must be available prior to interview by SBE, the applicant must demonstrate that it has been applied for prior to submission of the proposed application. (Appendix I)*
5. *Copy of any board policies if adopted already (Appendix J).*
6. *Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).*

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

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

**X Not Applicable**

**Private School Conversions: complete ONLY if the proposed charter is a private school conversion.**

*Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

**X Not Applicable**

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

**X Not Applicable**

**Projected Staff:**

Provide, as Appendix M, 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.

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

Include the following information for the proposed charter school:

FernLeaf's strategy for attracting teachers is to offer a highly competitive compensation along with an attractive work environment. The School Director will have primary responsibility for recruiting teachers and may use a variety of resources including local media, job fairs, FernLeaf website, teacher recruitment websites, etc.

In order to attract and retain the finest teachers, FernLeaf will:

1) Ensure a quality work environment that is respectful of teachers by providing:

\*opportunities for growth, leadership, and career advancement;

\*time to plan and develop effective strategies for student learning and professional growth;

\*thoughtful schedules that support a balanced and healthy lifestyle;

\*a healthy work environment that meets a variety of personal and professional needs;

\*an organizational structure that provides teachers with a strong voice in decision making.

2) Offer highly competitive salaries and a personal choice in retirement and health insurance benefits.

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

4) Recruit teachers known to be exceptional and capable of supporting FernLeaf's mission through their teaching approach/philosophy.

5) Educate strong teachers with proven performance records about general statutes that permit teachers within an LEA to request a leave of absence of one year in order to teach in a charter school G.S.115C.238.29F (e)(3).

6) Develop a teacher training/internship program that utilizes local college and high school students as assistants/teachers (paid and unpaid). This permits identification and preparation of future FernLeaf teachers while simultaneously providing a variety of teacher assistant options for the school.

7) Partner with area colleges and universities to gain access to high quality student teachers who can learn to effectively work within the FernLeaf culture while developing their teaching skills.

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

While the Board of Directors is the employer of all staff, it hires and directly supervises only the School Director. The School Director is responsible for hiring and supervising all other staff. The Board of Directors will have final approval of all employee terminations based on the School Director's recommendation.

The FernLeaf Board of Directors will not interfere in the management of the school or in the classrooms of teachers. However, as part of the school wide evaluation process, board members will sometimes be present in classrooms and throughout the school. Teachers and board members will be advised of the nature of these visits and be reminded to adhere to the formal grievance procedures for expressing concerns. Board members will be trained on how to conduct school evaluations so that they do not take on an inappropriate supervisory role that is inconsistent with their governance responsibilities.

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

FernLeaf will follow all applicable laws regarding equal employment opportunities, and will not discriminate against any qualified candidate or employee on the basis of race, color, religion, sex, national origin, age, genetics, or disabilities. A three staged application and interview process for hiring instructional, counseling, and assistant administrative personnel is outlined below:

1. Candidates submit resume and an online application including an original standards based experiential lesson developed by the candidate and a constructed response explaining why they would be successful at FernLeaf.
2. Interviews with School Director and other staff, as well as satisfactory reference checks.
3. Audition where candidate is given an opportunity to work with students and is observed for specific behaviors and skills consistent with the FernLeaf mission.

The School Director will make hiring decisions for all school staff. Pursuant to G.S. 115C-238.29K and NC SBE Policy, all employees with fiscal responsibility will be subject to a criminal background check that will be initiated within 10 days of hiring.

All exempt employees will be employed on a contractual basis not to exceed one school year with no guarantee of contract renewal in subsequent years. New instructional staff will be hired under a 90 day provisional contract period before the School Director determines if a contract will be offered for the remainder of the school year. Returning staff will be offered a contract for one school year with termination for cause language as outlined in NC Statutes for public schools.

Non-renewal of a contract due to insufficient performance of the employee will be preceded by coaching and counseling as outlined in the Employment Policies Section 480. Termination of an employee or non-renewal of a contract will be recommended by the School Director and approved by the Board of Directors. Policy details can be found in Appendix N and Appendix



J.

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

The board developed a salary structure to attract the finest teachers while allowing employees more control over their benefit choices. To remain competitive, starting salaries are based on the current state salary schedule for each position but are increased by the amount that FernLeaf would otherwise have contributed under the State Health and Retirement Plans as we do not plan on participating in these two plans. Salaries for all certified teaching staff and counselors will range from \$42,920 - \$79,796 depending on years of experience and degree earned. Salary increases will be on a step scale which may be modified annually by the Board of Directors. The School Director and Assistant Director salaries will likewise depend on experience and will range from \$70,000 and \$55,000 respectively, up to an amount determined by the Board of Directors. Teacher Assistants will start at \$26,928, custodians will start at \$31,625, and office staff at \$26,928. All salary or salary scale increases will be determined annually by the Board of Directors.

Due to the current volatile nature of the health insurance industry we want to be flexible in our decision about providing insurance through the State Health Plan. If it is more attractive to offer employees the State Health Insurance plan when we begin hiring staff, the board will consider reducing the planned starting salaries and participating in the State Health Plan. FernLeaf employees will also be in control of their own retirement planning and will be paid a higher salary in lieu of participation in the State Retirement Plan. This will allow each employee to control contribution levels and investments. We plan on helping our employees plan for retirement through informational training about various options that are available to individuals apart from employer sponsored plans or pensions.

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

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

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

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

Termination Policies and Procedures are found in Appendix N - Employment Policies section 480.

Termination procedures will be handled by the School Director who has the responsibility of determining a corrective action plan for any employee who is not meeting job performance expectations. A plan may include coaching, counseling, suspension, transfer to another position, or dismissal from

employment depending on the nature of the situation. The written corrective action plan will include specific time frames for expected performance achievements. If the employee fails to meet those expectations, the School Director may obtain board approval to dismiss the employee.

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

Not applicable. FernLeaf will not have any positions with 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.*

One certified Exceptional Children teacher will be hired for the first year of operation. An additional EC teacher is budgeted for the fourth year of operation consistent with proposed grade level expansions. Additional resources will be provided as necessary through other contracted teachers and services.

The needs of students who excel academically and those who are ELL will be met in the context of the regular instructional setting through the use of strategies described fully in the Education Plan. All teachers will be trained in these strategies. If FernLeaf is unable to meet the needs of these students utilizing in house staff, additional resources will be provided through other contracted teachers and services.

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

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

Tasked with sowing the seeds of FernLeaf's culture, image, and identity, the School Director must exercise key executive decision making in addition to managing every aspect of the school's operations. They must lead in a way that allows the school to adapt quickly to the changing needs of the school community. The successful Director has a high level of commitment to children and thrives in both professional adult and child centered environments. The Director clearly communicates FernLeaf's vision in a way that provides a sense of ownership to students and staff and facilitates the distribution and development of leadership and responsibility amongst all stakeholders. Qualifications include a minimum of 5 years experience in education and demonstrated managerial skills of leadership, business acuity, human resource insight, and vision implementation. FernLeaf may consider individuals who have demonstrated essential managerial skills in educational settings as well as non-educational settings. Educational requirements include a Bachelor's Degree and educational licensure.

The Assistant School Director works closely with the School Director and is charged with significant administrative responsibilities including interfacing with contracted vendors, maintaining licensure records, creating and tracking professional development, and other tasks delegated by the School Director. They are flexible, able to multi-task, and willing to perform any duty associated with school operations. They have demonstrated leadership abilities, strong interpersonal skills, and the ability to plan, organize, and implement projects designed to enhance school performance. In the absence of the School Director, the Assistant School Director will

provide continuity in leadership. Qualifications include a minimum of 5 years experience in education along with demonstrated managerial and leadership skills. Educational requirements include a Bachelor's degree and educational licensure.

The Integrated Curriculum Teacher possesses a broad knowledge base and will creatively integrate multiple disciplines to make learning engaging, relevant, and meaningful. They should be able to create a loving, compassionate, and respectful climate that allows students to fully engage. They teach, model, and integrate ways of learning, doing, and being while facilitating the acquisition of higher level cognitive skills (critical thinking, problem solving, and information and communication technology literacy). They help students develop executive functions such as planning, organizing, and multi-tasking while encouraging creativity. They facilitate both acquisition of social skills and emotional development allowing students to develop functional relationships in and out of school. Teachers utilize knowledge of new technologies to improve instruction. They should be able to demonstrate habitual mental practices that include empathy toward others and reflection on their own actions and practices. Teachers share in the responsibilities of school leadership and are expected to assume responsibility for the success of the FernLeaf Community. Qualifications include successful experience in education along with a demonstrated commitment to children. Educational requirements include a Bachelor's degree and state certification.

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

Full time Teacher Assistants provide assistance primarily in the early grades and as such must have patience and loving concern for young students. Assistants will be responsible for helping the teacher with classroom management, student needs, and other delegated tasks. They will work to provide instruction, scaffolding, or tutoring with individual students and in small groups, and be responsible for supervising students in the classroom or other areas of the school. Assistants are responsive to the personal and educational needs of the students and teacher in the classroom. They possess a high school diploma and preferably some college experience along with knowledge of child development.

The part time Teacher Assistant has a flexible work schedule and performs the same duties as the full time teacher assistant. Candidates must be at least 16 years of age, possess a high school diploma or be attending school, have a desire to help young students learn, and be interested in gaining practical hands on experience in the field of education.

The School Counselor creates caring and nurturing relationships with students in order to enhance personal and academic success. Counselors show leadership in creating a caring and supportive environment for students.

They advocate for students and the school, locate resources, and collaborate with a variety of entities to help students be successful. They evaluate student needs, utilize group and individual counseling techniques, and utilize their knowledge of human physical, intellectual, emotional, and social growth and development. As FernLeaf's School Counselor has interaction with the entire FernLeaf Community, they should possess outstanding communication and interpersonal skills. Qualifications include a Master's Degree and at least three years of experience in a related field. Preference may be given to candidates who possess School Counselor Licensure.

Office Assistants organize the school's main office and handle its reception needs. They assist the School Director and Assistant School Director with tasks necessary for the smooth operation of the school and are available to provide administrative assistance to teachers as necessary. Office Assistants utilize customer service skills as they encounter parents or other stakeholders who at times may be difficult. They must enjoy working with children who have a variety of personal needs. They must be highly organized and willing to compassionately assist others. They use technology to access student records and communicate information to parents, teachers, and other outside contacts. The successful candidate will have a minimum of a high school diploma, preferably with some college experience. They must also have work experience that demonstrates their ability to manage numerous tasks simultaneously with calm focus.

The Custodian is responsible for the routine cleaning of the common areas of the school and the maintenance of the buildings and grounds. They should be willing to perform a variety of duties in addition to cleaning and maintenance. The custodian should possess or be willing to obtain a license for operating a school bus as they may be called upon to assist with driving for a variety of school purposes. They should have experience working in maintenance and be familiar with the most efficient cleaning routines and products for schools. The custodian should also be loving and compassionate toward children and willing to work in an environment where children must be taught appropriate care and hygiene.

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

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

The School Director and Assistant Director (starting in year 2) will be responsible for maintaining teacher licensure records and facilitating professional development opportunities that meet renewal requirements.

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.*

FernLeaf will provide annual orientation during the workdays preceding the start of each school year for all teachers in order to affirm the school mission, establish expectations, provide direction, and immerse new teachers into the FernLeaf school culture. Teachers will participate in Staff Development as planned in the school calendar (outlined in responses to the next 3 questions) that will be tailored to the needs of the school and the teacher while providing the necessary credits to maintain licensure prescribed by state law and the appropriate qualifications as defined in

NCLB. Teachers who have less than three years of previous teaching experience will participate in FernLeaf's program of support for beginning teachers outlined in the Employment Policies Appendix N.

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

FernLeaf's teacher evaluation will have three components:

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

FernLeaf will follow the State Board of Education Policy on Standards and Criteria for Evaluation of Professional School Employees and all instructional staff will participate in the NCEES. This process involves both self assessment and formal and informal observations by peers and the teacher's supervisor. Additionally, the Board of Directors will oversee annual surveys of both parents and students in order to provide feedback on the effectiveness of each staff member. A component of FernLeaf's mission is to embody "the essence of community" which includes students and their families, so seeking survey evaluations from these stakeholders is seen as an essential part of the school staff evaluation process. According to our mission: "in addition to achieving academic fluency, students will become thoughtful, compassionate, and engaged". FernLeaf believes that the NCEES measures many aspects of a teacher's effectiveness but that additional measurements are needed to evaluate a teacher's effectiveness in achieving our specific mission. In addition to survey results, FernLeaf's School Director and Board of Directors may develop additional evaluations to measure teacher's effectiveness in implementing and upholding the mission. The School Director and Assistant School Director will be evaluated using the North Carolina Standards for School Executives. The School Director will oversee the completion of the Assistant School Director's evaluation process and the Board of Directors will oversee that process for the School Director. Survey results from parents, staff, and students will also be used to evaluate the performance of the School Director and Assistant School Director. Both individuals will also be evaluated using an instrument developed for implementing and upholding the FernLeaf mission.

Other staff (Teacher Assistants, part time Teacher Assistants, Office Staff, and Custodians) will be evaluated by the School Director or designee using an evaluation form to be developed by the Board of Directors based on the responsibilities cited in the job description.

3. *Describe the core components of professional development plan and how these components will support effective implementation of the educational program. Describe the extent to which*



*professional development will be conducted internally or externally and will be individualized or uniform.*

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

1. Individualized professional development based on teachers needs:

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

2. Leadership development and opportunities for teachers:

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

3. Implementation of an expansive and integrated curriculum:

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

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

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

5. Implementing comprehensive assessment strategy:

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

6. Project development and implementation:

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

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

The FernLeaf school calendar allows for four staff professional development and workdays prior to student arrival at the beginning of the school year. Approximate time frames and topics that will be included in this initial orientation training are as follows:

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

\*School policies and procedures.

\*Student policies and expectations.

\*Staff policies and expectations.

- \*State mandated trainings (i.e. Blood-borne Pathogens, School Safety, etc.).
- \*Training on the North Carolina Educator Effectiveness System.
- \*FernLeaf operational procedures.
- \*Using Powerschool and other school wide technology/programs.

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

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

Day 4 - Familiarization with FernLeaf comprehensive assessment strategies:

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

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

Staff development is important to establishing and maintaining a collaborative and respectful learning community at FernLeaf. The calendar was intentionally designed to support a teaching and learning environment that allows teachers time to research and become knowledgeable about educational innovations and research-based strategies. A positive environment for teacher development must include sufficient time to acquire skills and to practice using those skills. The school calendar allows for significant professional development opportunities which include four days at the start of the school year, seven days throughout the school year, weekly early release days, and three days at the end of the school year. The exact number and duration of training opportunities during these times will vary based upon a balancing of specific staff training needs, licensure requirements, and teacher planning time. Included in our staffing plan is sufficient staff so that each teacher will have daily planning time without student supervision responsibilities. This planning time will be used in part to include new strategies learned during professional development sessions into the classroom.

### **Enrollment and Marketing:**

- Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access



to all students. Read the charter school state statute regarding admissions GS 115C.238.29F(g) (1-7) carefully.

### **Marketing Plan**

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

One of the primary goals of all marketing efforts is to drive people to the well established FernLeaf website which has been in operation since March, 2013. The website provides families and community members with detailed information about FernLeaf and allows them to request additional information. While traditional public advertising will be necessary to create awareness/interest and drive people to the website, creating strong "word of mouth" marketing is equally vital to the overall campaign. FernLeaf recognizes that the success of the school hinges on an effective marketing campaign, and as such has budgeted \$15,000 for the first year and \$5,000 for the following 5 years.

The overall marketing plan may include:

- \*Informational booth at the Henderson County Kindergarten Readiness Fairs (April, 2014 & 2015).
- \*Public informational meetings at libraries, county offices, and other public spaces where available (September, 2014 - June 2015).
- \*Presentations to local Pre-K programs, churches, and other area youth organizations (September 2014 - June 2015).
- \*Informational booths at local festivals, parades, farmers markets, etc. Possible events include: Hendersonville Apple Festival Sept 2014, Brevard White Squirrel Festival May 2014, Hendersonville Christmas Parade 2014, Hendersonville 4th of July Parade July 2014 & 2015, Asheville Brewgrass Festival September 2014, Asheville Art in the Park June and October 2014.
- \*Billboard advertisements in strategic locations (January - May 2015).
- \*Local print media advertisements - The Mountain Express, WNC Parent, Hendersonville Times News, Asheville Citizens Times, Bold Life, Blue Ridge Outdoors Magazine, etc. (January - May 2015).
- \*Direct mailings to strategically targeted communities (January - May 2015).
- \*Press releases issued to local media outlets (April 2015).
- \*Local radio/television advertisements and Public Service Announcements (PSAs) (April 2015).
- \*Door to door outreach in strategically targeted communities (April 2015).
- \*Informational flier distribution (English and Spanish) at local child care facilities, libraries, churches, retail establishments, restaurants, grocery stores, etc. (January - June 2015).
- \*Personal outreach by all board and committee members (ongoing).
- \*Outreach through social media outlets (ongoing).

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

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

### **Parent and Community Involvement**

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

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

- \*Attending the Henderson County Kindergarten Readiness Fair.
- \*Attending festivals, parades, street fairs, farmers markets, etc.
- \*Establishing contact and partnerships with local community organizations i.e. Henderson/Buncombe County Boys and Girls Clubs.
- \*Holding public informational meetings for prospective families in various locations.
- \*Scheduling presentations with local Pre-K programs, churches, and other area youth organizations.
- \*Contacting local employers to make them aware of the school, to begin to develop partnerships, and to ask them to make employees aware of the proximity of the school.
- \*Utilizing Public Service Announcement (PSA) opportunities from local news outlets and radio/TV stations.
- \*Developing outreach through social media outlets.

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

- \*Holding open house events
- \*Encouraging parents of enrolled students to volunteer in the development of the school
- \*Establishing the parent organization early on during the enrollment period
- \*Hosting orientation sessions immediately prior to the school's opening

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

- \*Establishing and maintaining frequent and meaningful two way communication between parents and school. Parents will receive regular and frequent progress reports about their children's growth and learning at school. The PowerSchool parent portal will be readily available permitting parents an up

to date view of their student's academic performance. Additionally, the school website will be a major hub of communication between the school, teachers, parents, and students. Parents and teachers will be encouraged to utilize telephone, email, and other forms of electronic communication to effectively communicate with one another.

\*Providing support and education to parents in their role as responsible caregivers, and to help them with their essential role in assisting student learning. Through the FernLeaf parent organization, relevant programs will be offered to help parents become involved in their children's education in a positive way. Workshops, seminars, and other resources about the challenges parents face with their children may be offered.

\*Giving parents a voice in the decision making that affects their children and the school. The FernLeaf Parent Organization is a place where parents may share ideas with other parents, the School Director, and staff in a friendly atmosphere. Parents who wish for more involvement may become part of the Parent Advisory Committee. This body meets regularly with the School Director and is a place for parents to contribute to the school's growth and development and to remain informed of the school's achievements and challenges.

\*Providing opportunities for parents to assist and feel welcome in the school. Parents will be invited to attend public displays of learning, project presentations, and will be called to become involved directly in student projects that involve their businesses, work, or hobbies. Numerous classroom volunteer opportunities will be available. Volunteers will be sufficiently trained so that they may play an effective and rewarding role to better the FernLeaf community.

## **Admissions Policy**

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

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

A detailed policy for Admissions and Enrollment can be found in Appendix J - Board Policies.

General Information:

Admission is open to all students eligible under the guidelines established in 115C-238.29F(g). Any child who is qualified under the laws of this State for admission to a public school is qualified for admission provided age and grade requirements are met. Per FernLeaf's mission and House Bill 250, the

board will develop specific strategies to ensure that enrollment reflects or exceeds the racial, ethnic, and socioeconomic composition of the local school systems.

Preference shall only be given to the children of founding board members (years 1-3 only), the children of the faculty and staff, the siblings of accepted students, multiple birth siblings, and currently enrolled students. Students will not be discriminated against due to ethnicity, gender, disability, academic ability, or any other distinguishing qualities.

A series of informational sessions for potential parents, students, and community members may be conducted prior to and during the open enrollment period. Attendance at these meetings in no way implies any enrollment commitment on the part of parents or FernLeaf. The purpose of any meeting is simply to provide relevant information about FernLeaf and the admission process.

#### Application Procedures:

Upon final approval from the SBE, FernLeaf will begin accepting applications for the 2015-2016 school year (this has historically occurred in March prior to the planned school opening). The tentative start date for the application enrollment process will be April 1, 2015. If the number of applications received exceeds the maximum number of available student slots by May 15, 2015, a lottery process will be used to identify students to be enrolled. If the number of student applications does not exceed the maximum number of available student slots by May 15, 2015, all student applications will be accepted for enrollment.

#### Lottery Procedures:

1. Names of students with a completed application on file will be drawn by grade level during a public lottery meeting. Multiple birth siblings will be entered as one surname with both being admitted if that surname is selected.
2. Students will be numbered for acceptance in the order they are drawn.
3. Up to 48 students per grade level will be accepted each school year.
4. Students beyond the maximum number of enrollment slots will be placed on a waiting list in the order in which they are drawn.
5. Applications received following the lottery proceedings will be placed at the end of the waiting list for the appropriate grade in the order received.

#### Wait Lists, Withdrawals, Re-enrollment, and Transfers:

As described in the lottery procedures above, a waiting list will be developed if the number of applicants for a given enrollment period exceeds the number of enrollment slots available.

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

Any student wishing to re-enroll after an official withdrawal will be required to complete a new application for admission and is subject to the

same procedures as new applicants. Currently enrolled students do not need to re-apply but will be asked to communicate their intent to remain enrolled for the following school year.

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

**PROJECTED ENROLLMENT 2015-16 through 2019-2020**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

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

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

	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000	LEA 450	LEA 110	LEA 000
Kindergarten	34	14	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 01	34	14	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 02	34	14	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 03	0	0	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 04	0	0	0	0	0	0	34	14	0	34	14	0	34	14	0
Grade 05	0	0	0	0	0	0	0	0	0	34	14	0	34	14	0
Grade 06	34	14	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 07	0	0	0	34	14	0	34	14	0	34	14	0	34	14	0
Grade 08	0	0	0	0	0	0	34	14	0	34	14	0	34	14	0
	136	56		204	84		272	112		306	126		306	126	

### **Transportation Plan:**

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

FernLeaf will actively assist parents in coordinating and developing car pools and arranging carpool pickup and drop off locations. To encourage participation, the board will develop strategies to incentivize parents to provide transportation for other students who do not have transportation. FernLeaf's transportation plan will unfold as the school grows during the first five years. A budget line item for transportation has been established that will provide transportation to any student for whom it is a part of their IEP, but also allows the school to set money aside to build resources to purchase busses in the future. If money is available in the spring of the first year of operation, FernLeaf intends to purchase a bus to use for school activities and student pickup/drop-off. Although a bus purchase will be a priority, we will not make that commitment until FernLeaf's financial situation permits the allocation of necessary funds. After transportation needs have been fully assessed based upon the location(s) of those enrolled and the actual location of the school, FernLeaf will consider partnering with Apple Country Transit to provide additional transportation options. Apple Country Transit is a local agency that provides Public and Human Services transportation. The board will continually monitor the transportation needs of the school community over time and develop policies to ensure that no student is denied access to the school due to lack of transportation.

### **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.*

FernLeaf will ensure that all students have access to a healthy daily meal by providing lunch to those who come to school without food for the day. Funds have been allocated in the budget to pay for food that will be provided to students in need, and FernLeaf will also rely on our parent association to raise additional funds for this purpose as necessary. Healthy food choices and environmentally conscious food sourcing are directly linked to FernLeaf's mission and will be modeled and taught on an ongoing basis. Parents and students will be provided with information, recommendations, and training regarding healthy food choices that will contribute to their overall success at FernLeaf. The School Director and the board will continually monitor the food needs of the school community over time and develop programs and policies to ensure that FernLeaf's approach is consistent with our mission.

### **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		\$3,729.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$ .00
Property Insurance	\$100,000		\$400.00
Motor Vehicle Liability	\$1,000,000		\$1,150.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$7,135.00
<b>Total Cost</b>			<b>\$12,746.00</b>

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

**Health and Safety Requirements:**

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

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

fernleaf 12/04/2013

(Board Chair Signature)

(Date)

**Facility:**

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

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

The FernLeaf Board of Directors is in the process of identifying potential sites for the development of school facilities at both permanent and contingency locations. Utilizing the "North Carolina Public Schools Facilities Guidelines" as well as the personal experiences of educators on

the board, we have identified minimum requirements for our contingency plan as well as requirements for a permanent facility. We are seeking a property in the north central part of Henderson County near the Henderson/Buncombe County line that will allow room for grade level expansions and has sufficient outdoor space, available utilities, and a reasonable proximity to the I-26 corridor. The board is working with a local Real Estate Broker to identify and evaluate a variety of sites to meet the school's needs. Several properties have been evaluated in order to form a baseline understanding of availability, costs, locations, and features. The board has selected a Facilities Advisor who will advise the board on issues related to obtaining an Educational Certificate of Occupancy as well as facility procurement and development in general. The steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy are outlined below:

- 1) Identify additional properties that meet established criteria and/or have the potential to be quickly and easily renovated to meet FernLeaf and Local/State Educational Occupancy requirements (October 2013 - August 2014).
- 2) Narrow identified potential properties through multiple site visits and consultation with the board's Facilities Advisor, Real Estate Broker, and any other relevant parties i.e. municipal and county officials (June 2014 - August 2014).
- 3) Request technical assistance and support from the NCDPI School Planning Office as necessary (June 2014 - June 2015).
- 4) Identify preferred site by September, 2014.
- 5) Obtain official cost estimates for needed renovation/construction and compare with budgeted plan for facilities to make final selection and enter negotiations.
- 6) Negotiate terms of lease by January 2015 (leveraging recent legislative changes contained in G.S. 105-275 regarding properties excluded from tax).
- 7) Finalize renovation plans and timetable to ensure completion by June, 2015.
- 8) Oversee progress of all site prep, renovations, etc. (January - June 2015).
- 9) Work with appropriate local and state agencies to obtain Educational Certificate of Occupancy by June, 2015.

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

In the event that a facility has not been identified by October, 2014 we will seek out a temporary facility in a reasonable proximity to our targeted location. The temporary facility should have the space for a minimum of 12 classrooms, office space, and adequate storage space. Location must also be able to accommodate traffic flow and safe student pickup/drop-off. The search for a contingent facility will continue with the assistance of the board's Facilities Advisor and Real Estate Broker and must be identified no later than the date enrollment begins.

Three contingency options that would be considered:

- 1) Lease vacant land and install modular units until permanent facilities are identified. The board has established contact with multiple modular companies and established baseline pricing and procedures.

2) Lease space in an existing office or retail location that meets educational occupancy requirements and is sufficient to launch the school despite not fully meeting FernLeaf's preferred criteria.

3) Lease facilities from an area church or other organization with available classroom space until permanent facilities are identified.

### V. 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 2015-16**

<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 #1 450 - Henderson County Schools</p>																							
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**Total Budget: Revenue Projections 2015-16 through 2019-2020**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
-State ADM Funds	\$898,862	\$1,348,293	\$1,797,724	\$2,022,440	\$2,022,440
-Local Per Pupil Funds	\$347,834	\$521,751	\$695,668	\$782,626	\$782,626
-Exceptional Children & Federal Funds	\$55,399	\$84,782	\$114,353	\$117,908	\$125,395
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$1,302,095	\$1,954,826	\$2,607,745	\$2,922,974	\$2,930,461

**\*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 R.**

**Personnel Budget: Expenditure Projections 2015-16 through 2019-2020**

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 (Appendix M).

BUDGET EXPENDITURE PROJECTIONS Personnel	2015-2016			2016-2017			2017-2018			2018-2019			2019-2020		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
School Director	1	\$73,000	\$73,000	1	\$74,460	\$74,460	1	\$75,949	\$75,949	1	\$77,468	\$77,468	1	\$79,018	\$79,018
Asst School Director	0	\$0	\$0	1	\$61,200	\$61,200	1	\$62,424	\$62,424	1	\$63,672	\$63,672	1	\$64,946	\$64,946
Office Staff	1	\$27,000	\$27,000	1	\$27,540	\$27,540	2	\$28,091	\$56,182	2	\$28,653	\$57,306	2	\$29,226	\$58,452
Custodian	.5	\$27,000	\$13,500	1	\$32,258	\$32,258	1	\$32,903	\$32,903	1	\$33,561	\$33,561	1	\$34,232	\$34,232
School Counselor	0	\$0	\$0	1	\$57,000	\$57,000	1	\$58,140	\$58,140	1	\$59,303	\$59,303	1	\$60,489	\$60,489
Substitute Teachers (Multiple)	1	\$3,000	\$3,000	1	\$5,250	\$5,250	1	\$7,125	\$7,125	1	\$7,875	\$7,875	1	\$7,875	\$7,875
A - Total Admin and Support:	3.5	\$130,000	\$116,500	6	\$257,708	\$257,708	7	\$264,632	\$292,723	7	\$270,532	\$299,185	7	\$275,786	\$305,012
Instructional Personnel:															
Integrated Curriculum Teachers	8	\$53,000	\$424,000	14	\$54,060	\$756,840	19	\$55,141	\$1,047,679	21	\$56,244	\$1,181,124	21	\$57,369	\$1,204,749
Teachers Assistants Flexible Part Time	1.5	\$17,760	\$26,640	1.5	\$18,115	\$27,173	2.5	\$18,478	\$46,195	2.5	\$18,847	\$47,118	2.5	\$19,224	\$48,060
Teacher Assistant (Fixed Hours)	4	\$27,000	\$108,000	4	\$27,540	\$110,160	4	\$28,091	\$112,364	4	\$28,653	\$114,612	4	\$29,226	\$116,904
Exceptional Children Teachers	1	\$57,000	\$57,000	1	\$58,140	\$58,140	1	\$59,303	\$59,303	2	\$60,489	\$120,978	2	\$61,699	\$123,398
B - Total Instructional Personnel:	14.5	\$154,760	\$615,640	20.5	\$157,855	\$952,313	26.5	\$161,013	\$1,265,541	29.5	\$164,233	\$1,463,832	29.5	\$167,518	\$1,493,111
A+B = C - Total Admin, Support and Instructional Personnel:	18	\$284,760	\$732,140	26.5	\$415,563	\$1,210,021	33.5	\$425,645	\$1,558,264	36.5	\$434,765	\$1,763,017	36.5	\$443,304	\$1,798,123
Administrative & Support Benefits															



Medicare	3.5	\$483	\$1,691	6	\$622	\$3,732	7	\$608	\$4,256	7	\$620	\$4,340	7	\$632	\$4,424
Social Security	3.5	\$2,064	\$7,224	6	\$2,663	\$15,978	7	\$2,593	\$18,151	7	\$2,650	\$18,550	7	\$2,701	\$18,907
D - Total Admin and Support Benefits:	7	\$2,547	\$8,915	12	\$3,285	\$19,710	14	\$3,201	\$22,407	14	\$3,270	\$22,890	14	\$3,333	\$23,331
Instructional Personnel Benefits:															
Medicare	14.5	\$616	\$8,932	20.5	\$674	\$13,817	26.5	\$692	\$18,338	29.5	\$719	\$21,211	29.5	\$734	\$21,653
Social Security	14.5	\$2,632	\$38,164	20.5	\$2,880	\$59,040	26.5	\$2,961	\$78,467	29.5	\$3,077	\$90,772	29.5	\$3,138	\$92,571
E - Total Instructional Personnel Benefits:	29	\$3,248	\$47,096	41	\$3,554	\$72,857	53	\$3,653	\$96,805	59	\$3,796	\$111,982	59	\$3,872	\$114,224
D+E = F - Total Personnel Benefits	36	\$5,795	\$56,011	53	\$6,839	\$92,567	67	\$6,854	\$119,212	73	\$7,066	\$134,872	73	\$7,205	\$137,555
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10.5	\$542,687	\$125,415	18	\$745,453	\$277,418	21	\$826,113	\$315,130	21	\$1,051,842	\$322,075	21	\$1,116,759	\$328,343
B+E = H - Total Instructional Personnel (Salary & Benefits)	43.5	\$224,968	\$662,736	61.5	\$251,309	\$1,025,170	79.5	\$278,366	\$1,362,346	88.5	\$303,629	\$1,575,814	88.5	\$323,990	\$1,607,335
G+H = J - TOTAL PERSONNEL	54	\$767,655	\$788,151	79.5	\$996,762	\$1,302,588	100.5	\$1,104,479	\$1,677,476	109.5	\$1,355,471	\$1,897,889	109.5	\$1,440,749	\$1,935,678

**Operations Budget: Expenditure Projections 2015-16 through 2019-2020**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
	Administrative & Support:					
Office:	Office Supplies And Paper	\$2,000	\$3,000	\$3,000	\$3,000	\$3,000
	Computers & Software	\$5,000	\$0	\$2,000	\$3,000	\$0
	Communications & Telephone	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000
	Copier leases	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
Professional Contract	Legal Counsel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Student Services And Finance	\$32,640	\$48,960	\$65,280	\$73,440	\$73,440
	Financial Audit	\$10,000	\$10,500	\$11,000	\$11,600	\$12,200
Facilities	Facility Lease/Mortgage	\$215,000	\$250,000	\$300,000	\$500,000	\$500,000
	Furniture	\$16,000	\$4,000	\$4,000	\$4,000	\$50,000
	Maintenance	\$1,000	\$2,000	\$2,000	\$6,000	\$8,000
	Custodial Supplies	\$3,000	\$4,000	\$4,000	\$4,000	\$4,000
	Extermination	\$500	\$500	\$500	\$500	\$500
	Security	\$2,000	\$2,000	\$2,000	\$5,000	\$8,000
Utilities	Electric	\$15,000	\$16,000	\$17,000	\$19,000	\$22,000
	Gas	\$16,000	\$18,000	\$20,000	\$22,000	\$24,000
	Water/Sewer	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Trash	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Transportation	Transportation Plan	\$15,000	\$30,000	\$30,000	\$30,000	\$30,000
Other	Marketing	\$15,000	\$5,000	\$5,000	\$5,000	\$5,000
	Child nutrition	\$2,000	\$3,000	\$4,000	\$4,000	\$4,000
	Travel	\$1,000	\$2,000	\$2,000	\$2,000	\$2,000
	Insurance	\$13,000	\$13,000	\$14,000	\$14,000	\$20,000
	Staff Recruiting And Background Checks	\$3,000	\$2,500	\$2,500	\$1,500	\$1,500
	Professional Development	\$4,000	\$5,000	\$5,000	\$5,000	\$5,000
	Contingency	\$24,000	\$50,000	\$50,000	\$50,000	\$50,000
	K - TOTAL Administrative & Support Operations	\$410,140	\$484,460	\$558,280	\$778,040	\$837,640
	Instructional:					
Classroom Technology	Computers	\$24,000	\$17,500	\$17,500	\$26,000	\$43,000
	Software	\$2,000	\$3,000	\$3,000	\$3,000	\$3,000
	Internet	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
Instructional Contract	Special And Individual Instructional Services	\$12,960	\$32,400	\$43,200	\$48,600	\$48,600

FernLeaf Community Charter School

Books and Supplies	Instructional Materials	\$5,000	\$6,000	\$8,000	\$10,000	\$10,000
Books And Supplies	Project Resources/Curriculum/Texts	\$12,000	\$15,000	\$21,000	\$24,000	\$24,000
Books and Supplies	Copy Paper	\$2,000	\$3,000	\$4,000	\$4,000	\$4,000
Books And Supplies	School Supplies	\$2,000	\$4,000	\$6,000	\$7,000	\$7,000
Books and Supplies	Testing Supplies	\$4,000	\$6,000	\$8,000	\$10,000	\$10,000
	L - TOTAL Instructional Operations	\$66,960	\$89,900	\$113,700	\$135,600	\$152,600
	K+L = M - TOTAL OPERATIONS	\$477,100	\$574,360	\$671,980	\$913,640	\$990,240

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2015-2016</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>
J - TOTAL PERSONNEL	\$788,151	\$1,302,588	\$1,677,476	\$1,897,889	\$1,935,678
M - TOTAL OPERATIONS	\$477,100	\$574,360	\$671,980	\$913,640	\$990,240
J+ M =N TOTAL EXPENDITURES	\$1,265,251	\$1,876,948	\$2,349,456	\$2,811,529	\$2,925,918
Z - TOTAL REVENUE	\$1,302,095	\$1,954,826	\$2,607,745	\$2,922,974	\$2,930,461
Z - N = SURPLUS / (DEFICIT)	\$36,845	\$77,879	\$258,290	\$111,446	\$4,543

**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.*

Analysis of waiting list data from area charter schools, parent/student focus groups, survey data, and census data, demonstrates that a significant demand exists to support enrollment in excess of FernLeaf's projections (see Appendix A). It was determined however, that in order to facilitate the sense of community mandated by our mission, the size of the school needed to remain small. FernLeaf's location was selected because of its convenience to students from both Henderson and Buncombe counties and the larger population bases of Asheville, South Asheville, and Hendersonville. We project that about 70% will come from Henderson County and 30% will come from Buncombe County. Since the Adjusted \$/ADM amount from the state is only \$17.84 greater in Buncombe County than in Henderson county and \$333.55 more in local per pupil funding, some shift in the 70%/30% distribution will not significantly impact FernLeaf's operation. We deliberately estimated our EC student population at a fairly low 8% in order to be conservative about the additional Federal revenue provided for those students (approximately \$3,700/student), but have budgeted sufficient EC resources (teachers and services) to handle a more reasonable 12% of the student population. FernLeaf's budget is based on filling two classes of 24 students for each grade level K-2 and 6th the first year, adding 3rd and 7th grade the second year, adding 4th and 8th the third year, and achieving full enrollment the fourth year with the addition of two 5th grade classes.

As previously stated, analysis of waiting lists and other data demonstrate significant demand to support enrollment projections. There are over 1,200 students on waiting lists in neighboring communities and there is currently only one Charter School in Henderson County (see appendix A for waiting list data). The existing/proposed Charter Schools in adjacent Buncombe County predominantly serve areas to the north and do not serve students in the southern area surrounding our proposed location. The proposed location has a sufficient base of school-aged children in the area from which to attract a diverse student body and provides easy access to the rich natural and cultural resources of the area. FernLeaf provides another choice for students on waiting lists at other area Charter Schools.

In 2015-16 the break-even point is 186 students, or 96.88% of the budgeted enrollment of 192. In year two the break-even point is 275 students, or

95.49% of the budgeted enrollment of 288. Year three's break-even point is 326, or 84.90% of the budgeted enrollment of 384. In year four the break-even point is 407 students, or 94.21% of the budgeted enrollment of 432. In year five the break-even point is 429, or 99.31% of the budgeted enrollment of 432. The increased percentage of student enrollment for break-even in years four and five is based on an expected increase in expenses for facilities purchase and/or expansion.

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

In addition to the contingency amount included in FernLeaf's budget (\$24,000 in year 1 and \$50,000 each year thereafter) there are other areas for expense reduction if revenues are lower than estimated. The transportation budget may be reduced by approximately \$10,000 in year one and \$25,000 in years two and beyond by removing our planned used bus purchases (budgeted funds for transportation required by IEP's cannot be reduced/removed). The technology budget may be reduced by increasing the planned student to computer ratio of 1:2 to 1:3 or 1:4. If enrollment is lower than budgeted by more than 10% we could consider not hiring one integrated curriculum teacher. If enrollment is at 90% or more of budgeted numbers, the number of staff hired the first year would not be reduced, but in subsequent years there is room to reduce or delay the number of Integrated Curriculum Teachers and to delay the hiring of a Counselor and/or Assistant School Director in the second year of operation.

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

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

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

15:1 with teacher assistants (lower in years 1-3)

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

FernLeaf will contract for student accounting and financial services, and will consider several vendors who are familiar with North Carolina Charter School accounting and financial procedures. A quote has been obtained from Acadia Northstar for budget purposes. We will also contract for instructional support services for students who require special services that the FernLeaf staff is not able to provide. We may also contract with a transportation service for students whose IEPs require transportation to and from school. Once a facility is identified, we may contract services related to leasehold improvements. FernLeaf will follow all applicable laws and regulations, good purchasing practices, as well as our clearly defined Conflict of Interest Policy contained in Article 10 of our bylaws. The decision to use any vendor for contracted services, or when making large purchases, will focus on determining who can best meet FernLeaf's needs while upholding our mission. The Board of Directors may delegate the authority to purchase goods or services and determine the procedure for

purchasing goods or services to the School Director or other individual who may have primary responsibility for various aspects of FernLeaf's operation. Until the School Director is hired, the procedures for selecting vendors for ongoing services or large purchases are as follows:

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

Contracts that will cause a change in a budgeted line item of more than 20% and are a minimum of \$5,000 should be brought to the attention of the Board of Directors by the School Director at the next regularly scheduled board meeting. While board approval is not required for these purchases, timely communication allows for assessment of any financial risks or opportunities in the budget.

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

Part of FernLeaf's mission is to establish a rich learning environment that is grounded in respect for the individual, our surroundings, and the world as a whole. A successful learning community that embodies this begins with a staff that embraces the mission and underlying values. FernLeaf prioritizes expenditures related to attracting and retaining capable staff while equipping them with the necessary resources and technology to make learning relevant, engaging, and meaningful. 70% - 75% of budgeted expenses are for staff and human resources, technology, project resources, books, and supplies. Our student to teacher ratio target is 15:1 with lower ratios of 13:1 and 14:1 achieved in our first three years of operation to assist with extra tasks associated with opening the school and establishing school culture. This reflects our commitment to an academically rigorous and integrated approach to project based experiential learning while recognizing an additional need for resourcefulness and creativity from staff, students, and parents. FernLeaf's budget also includes practical and realistic expenditures for the transportation and facilities necessary to support this type of learning environment. It allows for the accumulation of the necessary funds to regularly transport students off site for project work and activities, and while modest, the facilities budget is adequate to support student learning.

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.*

FernLeaf's goal is to have a balance of 20% of its annual expenditures in a general fund. The budget reflects the attainment of this goal during year four and the fund balance may be further increased each year by minimizing expenses, seeking grant opportunities, and implementing fundraising projects through the parent organization and the Board of Directors.



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

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

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

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

FernLeaf does not presently have any assets from other sources.

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

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

The Board of Directors will write clear and enforceable policies that ensure adequate internal controls necessary to protect assets and segregate duties. While the board's role is not to directly manage the financial affairs of the school, its involvement must ensure that adequate and accurate record keeping is occurring, and that duties are segregated.

Several areas of policy development will be key components of FernLeaf's internal controls. These are areas identified in the National Resource Center on Charter School Finance & Governance's "Assessing Fiscal Health: A Financial Benchmarking Tool for Charter Schools", pages 19-20 which is available on their website

(<http://www.charterschoolcenter.org/resource/assessing-fiscal-health-financial-benchmarking-tool-charter-ssschoools>):

1) Establish policies that monitor facilities and equipment for upkeep and repairs, provide for regular review to identify cost savings and/or facilities maintenance needs, guide the School Director in prioritizing repairs due to budget constraints, and promote the development of an energy management plan.

2) Develop fiscal control policies delineating clear procedures for purchasing approval/process for large purchases, proper segregation of duties for financial processes, implementation of the Conflict of Interest Policy, confidential reporting of financial wrongdoing, safeguarding of school data from theft/destruction, and following record retention requirements.

3) Implement property management controls that ensure adequate accounting of all property so the school has accurate information concerning its assets, require regular inventory/reconciliation of all fixed assets, and provide even more frequent inventory/reconciliation for large assets valued over \$5,000.

4) Develop fiscal policy and procedures to include adherence to state mandates regarding general accounting procedures, cash and grant management procedures, payroll procedures, accounts payable and other liabilities, and management reporting procedures.

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

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

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

FernLeaf has contacted a firm familiar with charter school operations and obtained information about the audit procedure, costs, and timetable. We

plan to contact them as well as at least 2 additional approved auditors after preliminary approval. A final decision regarding which firm will be used has yet to be made.

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

**VI. AGREEMENT PAGE**

**Application Fee:**

*Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$500 application fee to the Office of Charter Schools. The applicant must submit their application fee by the December 6, 2013 5:00 pm EST deadline. Payments will be accepted in the form of a check only. Cash or credit cards are not accepted.*

*\*Application Note: The applicant must mail the check along with a copy of the proposed charter LOI to be received before or on the due date of December 6, 2013 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

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

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

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

fernleaf

Date: 12/04/2013

**Applicant Signature:**

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

Print/Type Name: fernleaf

Board Position: Vice Chairperson

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

Date: 12/04/2013

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

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

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

