

Cardinal Charter Academy at Knightdale - CCAs mission is to build a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology rich methodology tailored to meet their needs.



Application Preliminary Evaluation Packet

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

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

Subcommittee Members:

Cheryl Turner
Joe Maimone
Amy Ruck Kagan
Leigh MObley
Becky Taylor
Eric Sanchez
Kebbler Williams
Helen Nance
Mike McLaughlin
Alex Quigley
Sherry Reeves
Tammi Sutton
Greg Schermbeck
Tracy Kelley
Alan Hawkes
Steven Walker
Phyllis Gibbs

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Date of Review:

10/23/2014

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Cardinal Charter Academy at Knightdale

Public charter schools opening the fall of 2016

Due by 5:00 pm, September 26, 2014

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

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

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

APPLICATION DUE DATE/TIME

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

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

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

APPLICATION SPECIFICATIONS

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

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

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TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	<u>6</u>
	Grade Levels Served and Total Student Enrollment:	7
	Concerns and Additional Questions	9
II.		
	<u>MISSION and PURPOSES</u>	<u>10</u>
	Mission:	10
	Educational need and Targeted Student Population of the Proposed Charter School:	10
	Purposes of the Proposed Charter School:	13
	Goals for the Proposed Charter School:	15
	Concerns and Additional Questions	18
III.		
	<u>EDUCATION PLAN</u>	<u>19</u>
	Instructional Program:	19
	Curriculum and Instructional Design:	20
	Special Programs and "At-Risk" Students	25
	Exceptional Children	29
	Student Performance Standards	33
	Student Conduct:	36
	Concerns and Additional Questions	38
IV.		
	<u>GOVERNANCE and CAPACITY</u>	<u>41</u>
	Governance:	41
	Governance and Organizational Structure of Private Non-Profit Organization:	41
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	47
	Private School Conversions:	51
	Projected Staff:	53
	Staffing Plans, Hiring, and Management	54
	Staff Evaluation and Professional Development	58
	Enrollment and Marketing:	62
	Marketing Plan	62
	Parent and Community Involvement	64
	Admissions Policy	65
	<u>PROJECTED ENROLLMENT</u>	<u>68</u>
	Concerns and Additional Questions	69
V.		
	<u>OPERATIONS</u>	<u>70</u>
	Transportation Plan:	70
	School Lunch Plan:	70
	Civil Liability and Insurance	71
	Health and Safety Requirements:	72
	Facility:	72
	Facility Contingency Plan:	73
	Concerns and Additional Questions	73
VI.		
	<u>FINANCIAL PLAN</u>	
	Budget: Revenue Projections from each LEA 2016-17	75
	Total Budget: Revenue Projections 2016-17 through 2020-2021	76
	Personnel Budget: Expenditure Projections 2016-17 through 2010-2021	77
	Operations Budget: Expenditure Projections	79
	Overall Budget:	81
	Budget Narrative:	81
	Financial Compliance:	84

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<u>Concerns and Additional Questions</u>	<u>86</u>
<u>VII.</u>	
<u>AGREEMENT PAGE</u>	
<u>Application Fee:</u>	<u>88</u>
<u>Applicant Signature:</u>	<u>88</u>
<u>VIII.</u>	
<u>APPENDICES</u>	
<u>OVERALL ASSESSMENT</u>	<u>88</u>
<u>Total External Evaluator Votes</u>	<u>89</u>
<u>Total Subcommittee Votes</u>	<u>89</u>
<u>CSAB Votes</u>	<u>89</u>
<u>Initial Screening</u>	<u>90</u>
<u>External Evaluator</u>	<u>90</u>
<u>Charter School Advisory Board Subcommittee</u>	<u>99</u>
<u>Overall Summary</u>	<u>99</u>

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Cardinal Charter Academy at Knightdale

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

Name of non-profit organization under which charter will be organized or operated: *Triangle Charter Education Association*

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: *Allen Taylor*

Title/Relationship to nonprofit: *Board Chairperson*

Mailing address: 7917 Bluffridge Drive
Raleigh NC 27615

Primary telephone: 919-846-3433 Alternative telephone: 770-500-9037

E-Mail address: allen.taylor@hatterasfunds.com

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

County: WAKE

LEA: 920-Wake County Schools

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

No:

Yes: X

If so, provide the name of the third party person or group. Charter Schools USA

List the fee provided to the third party person or group. \$0

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

Our EMO, Charter Schools USA ("CSUSA"), assisted us in the development of this charter application. Charter Schools USA will assist us throughout the

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entire application process and if we are awarded a charter, they will assist us throughout school start up and operation.

The information we have provided in this application may be similar or identical to information that you will find in the application of other applicants who are also partnering with CSUSA. This similarity is intentional. Our board desires to use the same successful EMO model and has based our application upon the use of that model in the community we seek to serve. CSUSA has assisted us with the preparation of our application in order to preserve fidelity to the school model we desire, adjusted as necessary to align with our mission, community and targeted student population. Throughout our application we are using "AOC" as a shorthand to denote the attribution of content to the CSUSA model.

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

No:

Yes:

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

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

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

<i>Financial History YR2011</i>	<i>Financial History YR2012</i>	<i>Financial History YR2013</i>
---------------------------------	---------------------------------	---------------------------------

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

No:

Yes:

If replication, please provide the name of the charter school and the state that charter school has been authorized to operate in. Hollywood Academy of Arts and Science FL

What is the name of the nonprofit organization that governs this charter school? Triangle Charter Education Association

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2016 *Month* August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (

5

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Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05,06	661
Second Year	K,01,02,03,04,05,06,07	903
Third Year	K,01,02,03,04,05,06,07,08	1076
Fourth Year	K,01,02,03,04,05,06,07,08	1099
Fifth Year	K,01,02,03,04,05,06,07,08	1145

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

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

ataylor26
Signature

Allen Taylor
Title

ataylor26
Printed Name

09/26/2014
Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>Its not clear why this is not a replication of Cardinal Charter Academy which is lead by current Board.</u>	<u>Tracy Kelley</u>	<u>Cover Page</u>
<u>Much detail should be included regarding the academic need for the school and the plan to recruit 661 students in its opening year. Seven-grade levels and 600+ students is a serious endeavor in a school's founding year.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Cheryl Turner</u>	
<u>Joe Maimone</u>	
<u>Amy Ruck Kagan</u>	<u>Pass</u>
<u>Leigh MObley</u>	
<u>Becky Taylor</u>	
<u>Eric Sanchez</u>	
<u>Kebbler Williams</u>	<u>Pass</u>
<u>Helen Nance</u>	
<u>Mike McLaughlin</u>	
<u>Alex Quigley</u>	
<u>Sherry Reeves</u>	
<u>Tammi Sutton</u>	
<u>Greg Schermbeck</u>	<u>Pass</u>
<u>Tracy Kelley</u>	<u>Pass</u>
<u>Alan Hawkes</u>	
<u>Steven Walker</u>	
<u>Phyllis Gibbs</u>	

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

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Clearly describe the mission of the proposed charter school:

A student centered environment focuses on the needs and interests of the students. As such, the school will employ data-driven techniques to ensure that each student is performing to his/her greatest potential. Every aspect of the technology rich learning environment benefits from a consistent instructional platform that gives students the ability to develop critical thinking skills to solve problems, retain knowledge, and apply that knowledge in an interactive learning environment.

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.*

We plan to target the student population along the Highway 64 corridor stretching from the I-540 Beltway terminus to the city of Zebulon. The school will be open to all North Carolina families desiring a school of choice, but our understanding of the market leads us to believe that almost all of our students will come from within this part of Wake County. While the school itself will be located in Knightdale, its convenient location on a major commuter path means that many parents from such towns as Wendell and Zebulon will also utilize Cardinal Charter Academy at Knightdale.

In order to determine the type of student body we will serve that reflects that diversity of the surrounding community, we measured sixteen public schools from the areas referenced above and came up with the following estimates:

Proposed School size: 1,145

White: 30%

Minority: 70%

Limited English Proficiency: 14%

Exceptional Student Population: 14%

Academically/Intellectually Gifted: 10%

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Free Lunch Population: 57%

Reduced Lunch Population: 8%

Title 1/Low Income Students: 63%

We chose this area of Wake County for two reasons. First, eastern Wake County's academic performance severely lags that of western Wake County. Among those public schools sampled for our student projections above, the 2013-14 Reading AMO scores averaged 36.8% and the Math AMO scores 39.5%. These averages, respectively, were 19 points and 16.5 points lower than the same averages for Wake County, and 7.9 and 3.6 points below the state average AMO scores. Moreover, three quarters of the sampled schools did not meet their Reading AMO targets, and less than half met their Math targets. Cardinal Charter Academy at Knightdale will help close the achievement gap in eastern Wake County using a student-centered and technology-rich learning environment designed to meet the needs of a very diverse student community.

Our second reason for targeting this area pertains to public school overcrowding. Wake County is one of the fastest growing counties in the country; in fact, a recent article states that it is growing at a rate of 62 people per day. Wake County overall recently hit 1 million people*, a population landmark that moves it even higher among the Top 50 most populous counties in the country. This growth has forced the District to "cap" seventeen elementary schools and one middle school, meaning those schools cannot accept students unless the students lived in that school's zone before capping took place (i.e. grandfather clause). Students will now have to be reassigned and/or bused elsewhere.

One of those newly capped schools, Hodge Road Elementary, is near the area in which we plan to build the school. A report released by the District states that it was enrolled at 93% of its capacity as of 2012-13. At that time, six other schools in our target area had exceeded 93% of their capacity, and two of them (Forestville Road Elementary and Wendell Middle) were over 100%. Again, this is a countywide problem, as the average capacity for Wake County overall was 95% and people continue to flood in. However, given the growth that we are seeing in places like Wendell (which will see its population double with 4,000 new homes soon), a new charter school facility in eastern Wake County would be a cost effective way of satisfying capacity issues.

*1 million mark: <http://www.wral.com/wake-county-population-reaches-1-million-mark/13915594/>

**4,000 homes coming to Wendell:
http://www.newsobserver.com/2013/10/21/3301630_developer-pays-34-million-to-buy.html?rh=1

- 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 in grades 9-12).*

As of the 2013-14 school year, Wake County Schools had 108,920 students in grades K-8. While we will likely enroll almost all our students from within Wake County, we do understand that some students from nearby Johnston County

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might trickle in, so here we estimate no more than 2% from that county. At full capacity, Cardinal Charter Academy at Knightdale plans to receive 98% of our students (1,122 total) from Wake County and 2% (23 total) from Johnston County. This means that, at full enrollment, our charter school will enroll only 1% of Wake Countys K-8 student population and only 0.1% of Johnston Countys K-8 student population.

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

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

We will implement an education plan that is different from the LEA in that it provides individualized, data driven instruction within a culture of high expectations and achievement; not just for students, but for staff as well. By analyzing data from the previous year and baseline assessments, we will set school-level, classroom-level, and individual student goals to set a purpose for learning for the year. Tracking progress towards goals is a keystone for this school, as the consistent monitoring process provides constant reminders as to how each student is progressing and how close we are to achieving our mission of building a student-centered learning environment.

Individualized attention sets this school apart because it will provide an opportunity for students who have been consistently under-served in the past to be able to reach their potential and get the differentiated instruction they need. We believe that since our mission is have every student reach his/her academic potential, every instructional minute counts; therefore our school day will be longer than other local schools in order to provide this individualized attention the students need.

Every child will have a personalized learning plan, which not only includes goals mentioned above, but also the action steps needed in order to reach the goals. The plan's development is a collaborative effort between the teacher, parent, student, and other staff involved with the student's academic achievement. Teachers will act as facilitators and coaches for the plans, aiding in creating, monitoring, and challenging the students to push themselves. The parents role is to be a cheerleader or mentor, motivating and guiding the students in their endeavors. Most importantly, students are the producers of the plan, faced with the responsibility of understanding their data, making good decisions as learners, and following through with expectations.

Another aspect of this school that will be unparalleled to any other school is the amount of support it will receive in order to monitor progress, enhance teacher effectiveness, and maximize the overall operation of the school. Described in more detail below, both school leaders and teachers will receive extensive and rigorous training prior to the start of the school year through professional development sessions that are tailored to the unique needs of their student population. Provided by CSUSA, up to four school site visits, called Quality Education for Students and Teachers (QUEST), will be conducted to monitor implementation of the education model. School leaders and staff will conduct weekly walk-throughs, check lesson plans, conduct data chats, and participate in other activities as needed to ensure teachers have the support and resources they need to provide effective instruction.

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An environment rich in technology will be provided for the students to promote student engagement and utilize real-world application skills. The goal of technology usage is to create an interactive classroom, taking technology out of the hands of the teachers and placing it within the hands of students, for an optimal experiential learning environment. The technology resources will be used for a variety of instructional methods, including interactive direct and guided instruction, blended learning for supplemental instruction, research projects, and many more. As society is more reliant on the use of technology, it is imperative that students learn basic skills such as word processing, presentation tools, internet research skills, etc.

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

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

The Six Legislative Purposes of a Charter School are:

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

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

Hold schools accountable

As a charter school, we will be held to high standards of achievement in order to be able to continue operating in the community. Consistent measures will be in place with constant monitoring to ensure we are meeting the expectations and goals described in this application. We will set school-level, class-level, and individual student goals, in addition to the goal-setting measures in this document. These goals will be monitored at each level the board will monitor progress toward school goals, the principal will monitor class-level goals, and the teacher will monitor individual student goals. This will be conducted through monthly board meetings, weekly data chats, and personalized learning plan meetings, respectively. Programs and instruction will be adjusted accordingly if it is found that we are not reaching our goals at any level. Additional support will be provided from

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the EMO, such as increased help from regional directors and curriculum specialists; strategic intervention plans to focus efforts; and any other strategy needed.

The Academy will develop a strategic action plan focused on its mission, vision, and values. Through analysis of assessment results, observations, surveys, and any other feedback items, the Academy will create key intended outcomes in each of the following five priority areas: academic excellence, financial health, growth, operational performance, and culture of excellence. The Academy will then create initiatives and monitor the implementation of these throughout the year. This plan is continuously reviewed and monitored at the school level, along with the Regional Education Director, the Curriculum and Instruction Team, and the Department of Strategy.

Accountability is a huge part of the schools culture. Weekly walkthroughs, Quality Education for Students and Teachers (QUEST) visits, and teacher performance evaluations will hold teachers accountable for providing quality instruction for their students. The purpose of the QUEST process is to support the school with the implementation and monitoring of the education model and examines three critical factors: classroom management, student motivation, and instructional strategies. Teachers and students become accustomed to having visitors within the classroom, as school leaders and support staff constantly monitor progress, and stakeholders want to be aware of what is happening in the school. Lesson plans, grade books, and other preparedness and organizational pieces are also checked regularly. Since there is a focus on technology-, the leadership team will monitor utilization of technology resources to make sure teachers are implementing a technology-rich environment to enhance the learning opportunities for students.

Improve student learning

The following supports will be used to improve student learning:

Push-in/Pull-out support: Certified teachers will be trained in the intervention program and will be available to pull-out or push-in with students who are below grade level. They follow a particular schedule each week to make sure students are receiving additional instruction as needed. Classroom teachers communicate with the support staff in order to increase awareness of current levels of skills and abilities of the students.

Tutoring/Extended Day: For students needing support beyond what is provided in the school day, tutoring will be available for one hour each day, three days a week. The amount and frequency can be adjusted based on the needs of the students. Instruction will be targeted toward specific fundamental skills and concepts to help students catch up to be able to catch up to grade level.

Differentiated RtI block: Our students will start their day with targeted instruction in classes that are grouped based on their various levels of performance. Students that are below grade level will receive an intervention focused on comprehension and word attack skills, for example. Novel studies that foster comprehension, vocabulary building, literary analysis and other reading application skills will be provided for students who are on grade level in reading. For those students who are on grade level in reading, but still need support in math, will receive instruction geared towards mastery of concepts and skill practice. As some students may be above proficient in both areas of reading and math, they will be able to

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participate in an enrichment block that involves applying their reading and math knowledge to real world, critical thinking tasks and projects. Each quarter, the groups are adjusted accordingly based on benchmark and classroom data to make sure students continuously get the support they need.

For students who are in need of academic enrichment, we will implement a Cambridge program in which to support academic rigor throughout the programming of the School. The Cambridge International Examinations program will provide an international, pre-university, curriculum and examination for students who benefit from a rigorous academic program. This supports the mission as Cambridge courses emphasize critical thinking through higher order thinking skills, oral skills, writing skills, problem solving, teamwork and investigative skills. Cambridge students are expected to have high academic expectations, be self-motivated, and have good study habits. They must demonstrate a commitment to succeed in this rigorous program.

Goals for the Proposed Charter School:

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

AOC - This information is similar to content provided by other applicants partnering with CSUSA.

Achievement: Each year on the state math, reading and science assessments, currently the READY EOG and End-of-Course (EOC) Assessments, we will significantly increase the percentage of students scoring proficient levels. Proficiency is defined by students scoring a level 3, 4 or 5. A significant increase is defined as a 10% reduction in the percent of students scoring at non-proficient levels (1 or 2) relative to the previous year. The assessment scores in Year 1 of the charter establish the baseline for measuring this goal. Assessment scores in year two provide the initial baseline comparison. If in any prior year, proficiency is at or above 90%, we will increase said proficiency by 1%, or meet or exceed the performance of demographically similar area schools. In year one, without a baseline comparison, the school will meet or exceed the performance of demographically similar area schools.

Growth: We will use NWEAs Measures of Academic Progress-MAP to track academic growth each year of the charter contract in grades K-8. The nationally normed MAP assessments provide RIT score targets for achievement and growth in math, English language arts and science 3 times per year. RIT scores are the NWEA equivalent of scale scores. In the fall of each year, NWEA provides every student with a spring RIT growth target representing the average fall to spring growth for students nation-wide in their grade level with similar fall RIT scores and test histories (when applicable). As students matriculate and improve their RIT score, NWEA adjusts growth expectations accordingly. These adaptive, research-based growth expectations ensure that each student has a growth target unique to their academic needs. With our mission to close the achievement gap, we recognize that for students who are significantly below grade-level, meeting their spring RIT target will not suffice. Therefore, at CCA, each grade-level will surpass 100% of their spring RIT growth targets in English language arts, math and science annually. All students with fall and end year scores will be included in NWEAs grade-level calculations of "Overall Percent of Projected

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RIT Met or Exceeded."

NC SPG: At the time of application, many details of North Carolinas School Performance Grade (SPG) calculation have not been finalized. Current documentation suggests that 80% or more of a schools final grade will be determined by the performance component, a measure of average student proficiency on the EOGs and EOCs. This will range from 0% to 100%. The remaining 20% of total SPG points will be determined by the results of a value-added student growth model. Our focus on proficiency as well as growth aligns to North Carolinas accountability expectations for 2015 and beyond. Because initial results for both the performance component and the value-added model are not yet released, baseline results are also unavailable for goal setting.

We will set a preliminary goal for the performance component using the September 4, 2014 release of 2014 EOG and EOC data. A baseline is estimated from the average performance of Knightdale-area schools on the reading, math and science EOGs and the Math I EOC. This baseline approximates the performance of our expected student population in 2013-14. In 2014, Knightdale-area schools scored an estimated 56% on the SPG performance component, the average of their EOG reading proficiency (49%), EOG math proficiency (48%), EOG science proficiency (61%) and Math 1 proficiency (67%). Applying our goal of reducing the percentage of non-proficient students by 10% would produce a year 5 performance component goal of 71%.

At the end of each year, we will document goal attainment and revise multi-year goals in an annual Strategic Plan.

For a list of the Knightdale-area schools included in this calculation as well as a table of SPG goals by year, please see page 1 of Appendix U.

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

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

As the governing board is the initial and leading driver of the mission, it is crucial that we stay informed of the progress of the achievement of the school. Student assessment and performance data are vital to our mission to build a student-centered, data driven learning environment. With the continuous improvement education model, we will regularly evaluate student performance to personalize and target instruction to each students needs, helping them reach their academic potential. This data-driven cycle of assessment, analysis, and action is critical for increasing student achievement and is the top priority for school-wide improvement. Regular assessments verify that students have successfully acquired crucial skills, mastered grade-level content are challenged to think critically.

We will monitor and evaluate specific, measurable goals regarding academic performance and growth. As detailed in Section II, academic performance and growth will be tracked on three dimensions:

- Proficiency: The percentage of students who are proficient on the EOG and EOC assessments, in math, reading and science.
- Growth: At each grade-level, the percentage of student NWEA growth targets met in English language arts, math and science will surpass 100%.
- State accountability: The schools Performance Component of the North Carolina SPG.

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In addition to state assessments, all students will take the completely computer-based, adaptive NWEA MAP assessments three times per year. The NWEA assessments also give students the opportunity to practice the newest technologically enhanced item types.

At the conclusion of each testing season and throughout the year as data become available, CCA will report state and interim assessment results will be reported to us at monthly board meetings. In CCAs first year, these initial results will act as a baseline for future goals. A baseline year will also be utilized when the state introduces new state-wide assessments or SPG calculations. In lieu of a baseline comparison in year one of the charter, we will monitor CCAs performance relative to demographically similar area schools.

We will also approve the Strategic Plan and School Improvement Plan (if applicable), both described above, in order to ensure that measures are put into place to achieve our mission. QUEST visit data from the EMO will deliver evidence that the teachers are adhering to the education model and implementing highly effective teaching strategies to the students.

To monitor school culture, we will view results from parent and staff surveys, which can provide insight on pertinent issues such as satisfaction and safety. Financial reports, enrollment and attendance figures, and other information needed to further monitor progress toward the mission will be viewed and evaluated as well.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
The mission statement describes the purpose of the school but focuses more on inputs rather than outputs. It does not express an ideal, long term impact, or scope and scale of the school being proposed. There is no articulation of what the school hopes to be or how it will reach a compelling innovative goal. There is no expression of clear guiding priceless or priorities indicating what the groups core educational beliefs are.	Tracy Kelley	Mission Stat
The application states that the school will provide a wide array of technology opportunities however there is \$0 set aside for software / hardware. Additional information should be provided.	Greg Schermbeck	Educational
Adequate information is provided.	Greg Schermbeck	Goals for th
The academic goals meet the evaluation criteria, but there are no goals included for the proposed school's operations, finances, or governance.	Kebbler Williams	Goals for th
The goals pertaining to operations, governance, culture, student staff retention, and finance are not included. Achievement goals do not provide for year 2 goals. Growth goal providing for 10% growth per year culminating in 70% proficiency goal at year 5 is low. There are no goals for technology usage or mastery by students, which is central to overall mission.	Tracy Kelley	Goals for th

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Pass
Leigh MObley	
Becky Taylor	
Eric Sanchez	
Kebbler Williams	Pass
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Pass
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

III. EDUCATION PLAN

(No more than ten total pages in this section)

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

Instructional Program:

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

AOC

As it is our mission to make sure every student reaches his or her academic potential, we plan to have a school that utilizes a data-driven, individualized learning environment to help students achieve their goals, regardless of the level of skill or knowledge they have. The core model of the school, developed by the EMO, is based on 35 years of research by Robert Marzano and has proven effectiveness in the schools managed by the EMO. The education model, shown below, follows six fundamental components:

Component 1: Baseline Assessment and Data

In order to effectively address the needs of each student, it is essential to first understand the current level of each student. This is accomplished through collection of student performance data from the previous year, in addition to administration of a baseline or diagnostic assessment in the beginning of the year as well as standards-based pre-tests prior to the start of each unit.

Component 2: Data Driven Instruction

The data is then analyzed to determine the appropriate course of action the teacher will take for instruction. The teacher must consider students levels, learning styles, and other unique needs each child has. Teachers are provided guidance and become well-versed in their understanding of the curriculum to know what needs to be taught and when. Utilizing their knowledge-base of various teaching strategies described further in the application, they provide instruction that is differentiated to ensure each child has the opportunity to master the standard being taught.

Component 3: Assessment

The only way to measure whether the instruction was effective and students learned the content expected of them is to assess. Students are assessed based on the standard they have been taught in a variety of ways, not just through a paper and pencil test. It may be through projects, essays, presentations, or other differentiated methods in order to provide multiple opportunities for understanding.

Component 4: Grading

Each assignment is graded based on the standard that was taught to the students in order to facilitate appropriate data collection and tracking of student progress on mastery of each standards. Grades are entered into the electronic gradebook for ease of collection and use.

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Component 5: Reporting

Timely and effective feedback is one of our core values. Students cannot be expected to learn and grow if they are not aware of their own strengths and weaknesses. Once material is graded, it must be presented to students and all other stakeholders in a timely manner, and effective feedback provides specific guidance to students as to what was correct and how any mistakes can be corrected. Simply provided a letter grade or saying "good job" is not enough. Teachers, parents, students, and administrators all have online access to the students grades to track achievement.

Component 6: Decision

After grades have been reported the teacher must determine the next step to move on to the next standard and start with a baseline assessment, or continue to re-teach the previous standard in a new way if students did not master the content. Regardless of the class-level decision, the students needing remediation or enrichment will receive appropriate differentiated instruction through small-group or blended learning environment.

This six-step process continues throughout the year to ensure students are provided ample opportunity to master all the standards expected of them for the year. This model tailors learning for each class and student, along with supplemental features, will help close the achievement gap for these students. Major features of the Academy, described further in the application, include Personalized Learning Plans, Instructional Focus Plans, meaningful parental involvement, character development, technology to support student engagement, and academic intervention and enrichment, including the Cambridge International Examinations program.

Curriculum and Instructional Design:

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

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

The Academy will have a highly structured classroom-based learning environment based on the targeted population of the school. Each class will have an essential question and objective posted to focus learning within the room, as well as a detailed minute-by-minute agenda to protect instructional time. Walls will be covered by student work, student-generated word walls, and visual student progress trackers toward mastery of standards and goals to promote student ownership of the classroom. Clear expectations for behavior are posted, along with anchor charts of step-by-step processes for material that has been taught, as both are intended to be consistent reminders for students to further embed the information.

Kindergarten classrooms are designed to accommodate 20 students at capacity. First through fifth grade classrooms are designed to accommodate 23 students while classrooms for sixth through eighth grades will accommodate 25 students at capacity. We anticipate that students will perform at various levels; the class will be organized to accommodate for differentiated instruction. All students will receive whole-group instruction, but will also receive targeted support from teachers in small-group and one-on-one

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opportunities. Students will participate in blended learning within the classroom, as they can complete assignments and coursework at their individualized level on various software programs. Visitors will be able to walk in the room and see various learning experiences happening at once: teachers working with a small group of students on a targeted skill, students on laptops receiving remedial or enrichment practice, groups of students working cooperatively on a project, or students working independently on leveled tasks. Structured procedures will be in place to ensure students stay on task to minimize distractions and keep all groups focused on their work.

Elementary and middle school will vary their structure as the middle school grades will be departmentalized by subject in order to ease the transition from middle school to high school. Departmentalization is also important because as the content students are expected to learn increases each grade level, the principal must consider the benefit of having teachers as masters of one particular subject area to be able to instruct the depth of knowledge required for mastery of the standards. Most elementary grades will be self-contained, in which all subjects (except for specials) will be taught by the same teacher within the classroom. The principal will have the opportunity to departmentalize other grade levels as well, depending on the needs of the students.

Each classroom will be the hub of student learning, so resources will be maximized within each room. Students will have access to a variety of texts to supplement learning, as well as read for pleasure, from the classroom library. Both fiction and nonfiction resources will be available and leveled so students can read appropriate books based on their ability levels. To support student engagement, technology resources will be taken out of the hands of the teachers and placed in the hands of the students to provide an interactive learning environment. The plan is to provide access to the following technology in each classroom:

- * 70 inch flat screen televisions with interactive tablets
- * Student laptops
- * Document camera
- * Headphones and microphones

Teachers will be trained to integrate technology into the student-learning environment to increase academic achievement for each student. The Academy will include a production room for filming, processing and streaming morning announcements; mobile and stationary computer labs; and multi-purpose rooms outfitted with sufficient audio/video equipment for presentations.

Provide a synopsis of the planned curriculum, including:

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

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population, and North Carolina Accountability Model.

AOC

The Academy will use CSUSAs Guaranteed and Viable Curriculum (GVC), which is aligned to the NC Accountability Model focusing on mastery of the Common Core State Standards and NC Essential Standards through the NC Standard Course of Study (NCSCS). The Academy will also implement the requirements outlined in the North Carolina Read to Achieve Program. The research behind the GVC comes from the work of Robert Marzano, who articulates that the GVC is primarily a combination of the factors "opportunity to learn" and "time." Both have strong correlations with academic achievement. The concept of opportunity to learn is a simple but powerful one - if students do not have the opportunity to learn the content expected of them, there is little chance that they will. Opportunity to learn addresses the extent to which the curriculum in a school is "guaranteed." This means that there must be clear guidance given to teachers regarding the content to be addressed in specific courses and at specific grade levels. It also means that individual teachers do not have the option to disregard or replace assigned content.

The GVC was created through the process outlined in Understanding by Design, by Grant Wiggins & Jay McTighe. As affirmed by Wiggins and McTighe, curriculum should lay out the most effective ways of achieving specific results. The GVC outlines the specific learning outcomes within the Common Core and NC Standards and was created in three stages: 1) identifying desired results, 2) determining acceptable evidence, and 3) planning learning experiences and instruction. Use of the GVC map enables educators the ability to provide students with optimal learning opportunities based on individual student needs. The standards are ordered and grouped in a particular way, and there are essential questions and objectives provided to target instruction for teachers. Sample resources, lesson ideas, and item specifications are included on the curriculum map to provide further guidance.

When planning for the year, teachers will study the curriculum map, along with the test specifications, in order to have an understanding of what students are expected to learn that year. For each unit, suggestions are provided on the length of time that the content should be taught; however, teachers have the flexibility to adjust this according to their knowledge of their students levels when entering the class. From there, a cross-curricular plan will be created with a team of teachers in each grade level, and re-created every quarter. Using the cross-curricular plan as a guide, teachers will write lesson plans week-by-week to ensure that they are covering the standards necessary in each unit. Essential questions and objectives provide guidance as to the focus and purpose of learning for the students as they create their lesson plans. Furthermore, teachers will be requested to map their plans minute-by-minute to maximize instructional time throughout the day, increasing the level of rigor in the classrooms.

Teachers will also be expected to incorporate technology into all lessons. Teachers can use their televisions to display and interact through tablets with online resources from Wonders, Envision, or any other Common Core resource the teachers use. Students will interact as well, showing their work on the tablet for the class to see, allowing other students to compare to their own work and evaluate. Students will supplement their instruction from the teacher by utilizing online software programs such as Reading Plus and ThinkThroughMath to work at their own pace and target deficient skills.

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Students can even take courses online through Plato to pursue personal interest or for course recovery, and the classroom teacher will check in and monitor progress. Laptop carts and computer labs are available for research projects, essay writing, PowerPoint presentations, and other activities for students to demonstrate their college-readiness skills.

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

AOC

We expect teachers to utilize as many research-based instructional strategies as possible in order to reach every child in the classroom, as it is our intent to provide a student-centered, data-driven learning environment. Teachers will be provided professional development in order to master Marzano's thirteen high-probability instructional strategies, which research shows yield the most gains from students when employed consistently within the classroom, regardless of the grade span. These strategies will be used in all grade levels, but instruction will vary by using increasingly complex text, teaching content specific to each grade level, and increasing the expectations and rigor as the grade levels progress. These engaging, rigorous strategies and their applications are described below:

Tracking Student Progress - Determine the current level of performance; identify achievement goals and established a rate of progress; track progress visually; adjust instruction to improve learning to reach goals.

Setting Goals/Objectives - Set a core goal and let students personalize it; make sure goals are achievable; help with strategies to achieve goals; monitor progress with students and celebrate success.

Building Vocabulary - Implement a comprehensive program for students to be able to understand complex texts, engage deeply with content area concepts, and participate in academic discussions.

Identifying Similarities and Differences - Include activities that involve comparing and classifying, analogies and metaphors, graphic organizers, etc.

Interactive Educational Games - Used in addition to effective teaching; define the objectives of the game to set a purpose; should be challenging, but not frustrating; can foster teamwork and social interaction.

Summarizing - Requires analysis of text to determine what's important; students use key words and phrases while summarizing content

Note Taking - Use teacher-prepared models/templates to teach basic principles and expectations; give time to practice note-taking and provide feedback on the skill; Students jot down main ideas, and write down questions.

Nonlinguistic Representations - Incorporate words and images to represent relationships; use physical models, dramatization, and movement to represent information; have students explain their rationale and meaning behind the nonlinguistic representation.

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Student Discussion/Chunking - Set expectations for classroom discussions; have students take notes throughout the discussion and segment the discussion to check for understanding; organize content into small, related segments that are more manageable for understanding in daily lessons.

Homework - Establish and communicate a homework policy; provide specific feedback on all assigned homework and vary the way the feedback is delivered.

Practice - Ask questions that require students to process and rehearse the material; give feedback on the practice while circulating and monitoring work; provide additional explanations and several examples; Utilize cooperative learning.

Effort and Recognition - Personalize recognition and praise for specific accomplishments; provide suggestions to help students improve if they are struggling, then praise the improvements.

Graphic Organizers - Use various types to expose students to information before they learn it, such as maps, diagrams, timelines, clusters, flowcharts, and structures.

Teachers are expected to adapt their lessons to meet the needs of all learners through differentiating the content that is taught, the process of how it is taught and how the students learn, and the product that is created by the students. Higher order activities such as project-based learning, critiques and evaluations, evidence-based activities, and more will be utilized to challenge students. Instruction will include leveled texts and resources for students on, above, and below grade level to provide support for all levels of students.

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

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

CSUSA's GVC is aligned to the Common Core and North Carolina Essential Standards and is mapped to ensure teachers have adequate time to cover all standards, and the students have the time to master them. The School's Common Assessments will be administered monthly and provide a uniform, formative assessment to track the Academy's overall mastery of the standards for each grade level. Questions for this assessment will be taken from the same item banks as the ones used in the NWEA assessments in order to provide consistency. Teachers will receive extensive training on use of the GVC to guide instruction, create effective lesson plans, and track mastery to ensure readiness to transition to the next grade level. To further ensure students are on pace for mastery, teachers will plan and schedule learning objectives aligned to the Instructional Focus Plan (IFP), described previously in the application. The IFP is a data-driven calendar used to determine which standards need to be re-taught, or taught more in-depth than previously expected in order to keep each class on track for promotion to the next grade level.

The Academy will utilize a proprietary report card to keep parents informed

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of their child's academic growth. The report card will give parents a comprehensive overview of their child's current skill level and a measure of his/her progress toward attaining mastery of the standards, as it contains both a practice grade and a mastery grade. It also includes a component regarding citizenship, aligned with integrated character development, which measures student performance based on conduct, participation, and effort. The report card will be sent to students and parents quarterly and will also be available via the parent portal. Interim progress reports will also be distributed to parents at the midpoint of each quarter. Since each assignment and assessment is directly aligned to the Common Core and NC standards and graded accordingly, a passing grade in the content area denotes that a student has attained an acceptable level of mastery. The report card, in conjunction with the child's personalized learning plans, will keep families more than adequately informed of each child's progress and readiness for promotion to the next grade level. Interventions and remediation described further in this application provide additional assurance that the Academy is taking appropriate actions to support all students in their academic success.

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

Research informs us that there is an instructional difference between annual growth for students who are on grade-level and catch-up growth for students that are below or significantly below grade-level (Fielding, Kerr and Rosier 2007). Addressing literacy and reading for those who are multiple years behind grade-level is not a single year process, in fact, it is only after 2-3 years of comprehensive reading instruction of more than 200 minutes per day that students begin to cross the threshold of grade-level performance (50th percentile). With this in mind, we intend to provide additional instructional minutes with a longer school day than the LEA to accommodate the interventions, as well as enrichment opportunities, we plan to provide to meet the needs of all of our students and close the achievement gap. We will have the required 185 days of instruction, with extra days for professional development for teachers. The professional development days coincide with the proposed purpose of increasing opportunities for teachers to develop their craft and enhance their skills in the field. Professional development opportunities will be focused on topics that align with our mission such as data-driven instruction, setting goals and tracking progress, critical thinking skills, and using technology to support learning within the classroom.

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.*

AOC

Teachers will be expected to differentiate instruction to reach all learners

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in all subject areas, but there are times when students need additional support to ensure they do not fall further behind. Diagnostic and benchmark assessments will be used to identify skill deficiencies and monitor progress, such as Wonders diagnostic assessment, Skills Based Checklist, Running Reading Records, and NWEA assessments.

When students are not performing at expected levels, procedures are in place to ensure students are properly identified and placed into appropriate intervention programs to get them back on track for success. The Academy will follow the Response to Intervention tiers:

* Tier 1 Standards-Based Classroom Learning: all students participate in general education learning that includes universal screenings to target groups in need of specific instructional and/or behavioral support; implementation of the Common Core and North Carolina Essential Standards through a standards-based classroom structure; differentiation of instruction including flexible grouping, multiple means of learning, and demonstration of learning; progress monitoring of learning through multiple formative assessments, and positive behavior supports.

* Tier 2 Needs-Based Learning: In addition to Tier 1, targeted students participate in learning that is different by including a standard intervention protocol process for identifying and providing research-based interventions based on student need, on-going progress monitoring to measure student response to intervention and guided decision-making. Instruction occurs in small-groups in addition to the time allotted for core instruction.

* Tier 3 SST-Driven Learning: in addition to Tier 1 and Tier 2, targeted students participate in learning that is different by including intensive, formalized problem solving to identify individual student needs; targeted research-based interventions tailored to individual needs; different curriculum resource; frequent progress monitoring; and analysis of student response to intervention(s). The time spent on instruction for Tier 3 students is in addition to the combined Tier 1 and Tier 2 amounts.

The Academy will implement various interventions depending on which tier the child falls under, and increase the amount of instructional minutes provided. The following interventions are provided:

* Differentiated RtI block students are placed in various classes depending on their levels and skill deficiencies for a block of time to receive targeted instruction in either reading, math, or science.

* Push-in/Pull-out instruction students receive intensive instruction based on their skill level outside of their core classes.

* Tutoring/Extended Day small group instruction utilizing a separate curriculum to reach the needs of the students below grade level after school.

The RtI block is provided for a set amount of time each day to students, but other interventions may be increased or decreased depending on the amount of support the child needs. For example, students can attend Saturday tutoring sessions, or have multiple push-in/pull-out sessions during the week to catch up to grade level.

Teachers will create a Progress Monitoring Plan, which describes the current level of the students based on data from their assessments, the targeted interventions they need, the frequency in which the interventions will be administered, and the expected outcome or goal of the intervention. This is

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signed by the parents, teachers, and administrators and the team reconvenes at least quarterly to monitor the progress and review the plan again. Teachers will provide more frequent updates through parent conferences, informal conversations, and assignments in the grade book.

Various programs are utilized within the interventions described above. Some materials that are used include:

- * Reading Plus
- * Reading Eggs
- * Triumph Learning
- * Wonderworks
- * Voyager Learning
- * Reading Mastery

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.*

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

The Academys ELL program for English Language Learner (ELL) students aims to prepare and successfully equip ELL students so that they are prepared to fully participate, engage and lead in their global community without a language barrier and with the benefits of being multilingual. In order to support our ELL students, we will equip them with targeted instructional supports necessary to achieve mastery of the NC English Language Proficiency Standards as measured by the W-APT and ACCESS for ELLs. A structured English immersion methodology will be used at the Academy to fulfill this goal, as this strategy has been shown to demonstrate the best results with ELL students. In addition, our extended school day and school year will provide needed additional learning time for these students.

ELL students will be identified in the initial assessments administered upon enrollment and through a Home Language Survey. Students will be selected to take the assessment if they are foreign-born or do not speak English in the home.

If students are language-minority students, they will be scheduled to be administered the W-APT within thirty calendar days of enrollment and the parent will be notified. If a student is tested, and it is determined that the student is limited English proficient, the student will be tested annually.

Once the assessment results are collected, an instructional plan for students who qualify will be created including the integration of scaffolding methods to address the ELL student and setting goals for achieving mastery of the NC English Language Proficiency Standards.

As prescribed by law, intervention will be administered that facilitates growth in English mastery, while promoting content knowledge. In order to promote both literacy and proficiency, the ELL program will provide English

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language development instruction that is age and grade appropriate and is tailored to the students English proficiency level. The ELL program will be conducted in a climate that promotes not only listening, speaking and reading, but also writing skills. ELL students will be offered instructional services through an English Immersion program mainstream/inclusion instructional delivery models. Instruction will be supported through the use of ELL instructional strategies. In addition, the curriculum, textbooks and other instructional materials used by ELL students will be comparable to those used by their non-ELL counterparts. Supplemental text and materials will also be provided.

Mainstream/inclusion instruction will be provided to ELL students equal in amount, sequence and scope to the instruction provided to non-ELL students at the same grade levels, while also including specific accommodations and modifications to the curriculum. The PLP will be used to show the areas of success and growth that the student maintains. The ELL strategies will be documented in the teachers lesson plan and in the students PLP and ELL folder.

The ACCESS will be administered yearly to assess ELL students. Once a student reaches proficiency in all four language domains of the assessment, as determined by NCDPI, he or she will exit the program. The students academic progress will be regularly monitored after exiting from the ELL program. Documentation, including the monitoring form and monitoring tool, will be placed in the students ELL file. The Language Arts teacher will indicate if the student is making appropriate progress or if an ELL committee meeting needs to be convened. During the ELL committee meeting, recommendations regarding the students progress can be made that include whether to place the student back into the ELL program if necessary.

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.*

AOC

The Academy will provide a Free and Appropriate Public Education (FAPE) to those that are identified as Academically/Intellectually Gifted (AIG). The program will meet the NC AIG Program Standards in accordance with Article 9B. In partnership with CSUSA, we will ensure that student identification procedures for AIG are clear, equitable, and comprehensive and lead to appropriate educational services through careful monitoring. All identification, screening, parental involvement, and procedural safeguard requirements will be followed in accordance with NC AIG Program Standards.

We will ensure consistency in the implementation of screening, referral, and identification processes. Screening will provide an equal opportunity for all students using the following:

- * Multiple criteria for decision-making, including informal assessment such as benchmark, state, EOC and EOG assessments
- * Assessments that go beyond a narrowed conception of giftedness

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- * Reliable instruments/strategies for assessing giftedness
- * Appropriate instruments to be used with underserved populations
- * Data which provide relevant information for instructional decision-making rather than labeling

All data obtained will become part of the student's AIG Differentiation Program folder and will be used throughout the process to determine appropriate services. Screening procedures and processes as well as the list of specific assessments used will be included in the folder.

Students who are identified and qualify for AIG will each have a Differentiated Educational Plan written at least once during each educational phase (K-3, 4-5, 6-8), with no plan remaining in effect for more than three years. This plan will include:

- * A statement of the present levels of educational performance of the child
- * A statement of goals, including measurable short-term instructional objectives
- * A statement of the specific services to be provided to the child
- * Appropriate objectives, criteria, and evaluation procedures and schedules for determining whether the objectives are being achieved

The AIG students will receive regularly scheduled enrichment provided by teachers meeting the following requirements: AIG add-on licensure; possession of an AIG Local Professional Achievement Certificate; or working toward obtaining an AIG Local Professional Achievement Certificate. These teachers will also collaborate with the students general education teacher to support the extension of the students learning. All AIG students will be responsible for mastering the CCSS and NC Essential Standards; however, differentiated instruction will be provided to the student to allow for more enrichment and curriculum compacting opportunities in areas of particular strength. This is in alignment with the schools mission of being student-centered and providing an environment tailored to the needs of the individual student. The goal of the program is to further develop the students cognitive learning, research and reference, and metacognitive skills at each grade level in one or more content areas which are aligned to the NC AIG Program.

Each quarter, teachers will analyze benchmark assessment results. For high ability students, teachers will use this to help identify enrichment areas. Within the framework of the Academys GVC Educational Model, teachers will determine the instructional focus, strategies, and curriculum resources to be used for enrichment during the 6 weeks between benchmark assessments. The AIG Program is built upon an academic foundation and centered on interdisciplinary enrichment activities. Students studies, for example, may include holistic projects that incorporate the development of advanced research skills, complex creative thinking and problem-solving, communication skills for a variety of audiences, and use of technology to promote the desire for learning on self-selected and/or teacher selected topics.

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),

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*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)*

AOC

The Academy will identify students who have previously been found eligible for EC services/protected under Section 504 by:

*Utilizing the Comprehensive Exceptional Children Accountability System (CECAS), or a comparable state system which tracks student information across school and district boundaries within NC.

*Enrollment packet documentation asking families to self-identify and requests copies of IEP/504.

*Registrar requesting complete academic records from prior school to review for indicators of EC/504 designation.

A team will be formed to collaboratively address the needs of students who have learning and/or behavior problems. The team will systematically monitor student progress and performance data and identify interventions to improve student performance. A student may be referred to the team by a teacher or at the request of the parent/guardian. This serves to ensure that all students suspected of having a disability and who are in need of instructional accommodations and/or special education and related services, are identified, located, and evaluated. All students will participate in evidence-based instruction. A tiered system of interventions will be provided to help struggling students make progress (see RTI).

Periodic assessments will be conducted during the intervention period to evaluate whether the student is responding to the interventions and to determine if the strategies were successful.

If successful, the team will continue to monitor. If not, and if evidence exists that show a disability may be the primary cause of the students difficulties, the student will be referred for an evaluation in accordance with NC 1503.

After parental consent has been obtained, a comprehensive evaluation will be conducted by appropriately certified/licensed professionals who may be contracted for services. The testing will include all areas related to the suspected disability, which may include but is not limited to cognitive functioning, academic achievement, psychological processing, speech/language skills, medical information, social/emotional functioning, and results from vision and hearing screenings. Once testing is complete, an eligibility meeting will be held.

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If special education/related services are necessary, an IEP will be written. If the child needs accommodations but not EC services, a 504 Plan will be written. It is the responsibility of the IEP Team (parent, general education teacher, special education provider, evaluation specialist, LEA representative) to make placement decisions and ensure that the students individual instructional needs are reflected in the IEP based on FAPE and provisions of least restrictive environment.

In addition to cumulative files, separate files will be maintained for EC records and 504 plans. These files will be accessible only by authorized individuals in accordance with state and federal policy. EC files will be organized with the most current IEP forms on top. The previous year forms will be arranged chronologically in descending order, with initial placement documentation at the bottom of the file.

Record request forms will be used to request records from previous schools. Once the registrar receives this signed form from the parent, it is faxed to the previous school. If the records are not received in a timely manner, a follow-up process will be followed with documentation of contact attempts. Student records will be maintained in locked cabinets in a secure area of the Academy. We will comply with FERPA and state policies related to reading, inspecting, or copying a student's educational records. All employees at the Academy will receive training, at least annually, related to the confidential nature of student records. The Academy's EC contact will receive training on the use of the Compliance Checklist published by NCDPI. This will be used as a self-evaluation tool. Should areas of non-compliance be noted, the Academy will take necessary steps to correct them.

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.*

AOC

For students who are performing below grade level, provisions of reasonable supplementary supports and services and/or modifications and accommodations will be provided to ensure that they achieve the CCSS and NC Essential Standards.

Teachers will use scaffolding and provide students with direct instruction, modeling, guided practice, and independent practice. Small groups will be used for more individualized instruction when necessary with additional support provided by EC staff or instructional coaches when needed.

Based on benchmark assessment data, students may receive additional instruction and practice on identified skills. Teachers will provide additional instruction outside of the standard instructional block through content area integration, during enrichment activities or lunch, and any other opportunity, to support student achievement of individual learning

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goals.

We will meet the individual needs of students who, based on diagnostic data, have been identified to have significant skill deficiencies and/or read two or more years below grade level through additional instructional minutes using a research-based intervention program. Students will receive additional instruction in a small-group setting with more frequent progress monitoring to ensure accelerated progress toward grade level expectations.

Appropriately certified teachers will serve students meeting the eligibility criteria for EC as specified in the students IEPs. Based on the enrollment of students with disabilities, we will hire and train the appropriate number of teachers/para-professionals to ensure adherence to the Federal and state guidelines for class size and caseload and ensure all necessary IEP services are being implemented.

Licensed/certified vendors will be contracted to provide special education and related clinical services. The students IEPs will determine the specific services that will be contracted for.

Students with disabilities whose IEPs demonstrate the need for special education or related services will be served in the regular classroom or EC setting, as determined by the IEP Team through consideration of the least restrictive environment based on the individual students need. The Student Services Coordinator will ensure that students are scheduled in a manner that allows for implementation of the services identified on each students IEP.

EC services will be provided through a model of inclusion for all students with disabilities, in the least restrictive environment as determined by the IEP Team. A continuum of special education and related services will be offered to meet the needs of its students with disabilities. Students will be educated in an EC setting only if the nature and severity of the students disability is such that education in general education classes with the use of supplementary aides and services cannot be achieved satisfactorily.

The EC teachers and the general education teachers will collaborate with regard to lesson planning and implementation and student progress. Related service providers will also collaborate with the students EC and general education teachers. This will ensure that all teachers working with the EC students will be focused on meeting the students needs as well as student growth and goal attainment.

We will comply with state policy NC 1501, et. seq. to ensure that students with disabilities receive a FAPE. A full continuum of services will be provided to meet the needs of enrolled students. When decisions are made related to addressing the needs of students with disabilities, these will be made through the collaboration of a team. For students with an IEP, this team will consist of the students parents, the student if appropriate, EC provider(s), general education teacher, and the LEA representative.

For students protected under Section 504, a team of no less than three individuals who know the student, have knowledge about the students disability, and are knowledgeable about instructional aids/accommodations will form that collaborative decision-making team. Families of students with disabilities will be provided with written procedural safeguards in the

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native language of the parent(s), unless it is not feasible to do so, in order to notify and make parents aware of their rights and responsibilities as parents of a student with a disability. If a written document in the native language of the parent(s) is not available, the explanation of the notice will be given orally or in a manner of communication the parent(s) will understand. Personnel at the Academy will ensure that the parent(s) has understood the information.

To ensure the provision of FAPE, personnel at the Academy will consider if the student requires assistive technology devices in order to access education. The need for an extended school year will also be reviewed and will be provided to students if determined necessary by the students IEP Team. Steps will also be taken to provide nonacademic and extracurricular services and activities to students with disabilities by providing supplementary aids as appropriate and necessary. Additionally, staff members responsible for student discipline will receive training on FAPE requirements to ensure that state policies are followed related to the discipline of students of disabilities.

Teachers and EC service providers will be responsible for implementing each students IEP. Providers will maintain service logs to reflect the delivery of services indicated on each students IEP. The teachers and service providers will be involved in progress monitoring to assess the progress each student is making toward his/her IEP goals. This information will be communicated quarterly to the students parent/guardian or more frequently if feedback is requested.

In addition, classroom teachers will remain in contact with relevant stakeholders by updating the students PLP, using data derived from ongoing progress monitoring, narrative report card, and benchmark testing results.

Vendors will be contracted to provide EC and related clinical services including but not limited to speech and language services, occupational therapy, physical therapy, social work services, nursing services, and school psychology evaluation services. The students IEPs will determine the specific services that will be contracted for. All contracted providers will need to be appropriately certified/licensed based on State Board of Education requirements. In addition, contracted providers will be required to maintain professional liability insurance. During the summer prior to the Academics opening, IEPs of enrolled students will be reviewed to determine which of these EC clinical services will be needed and to finalize contracts to allow services to be in place at the start of the school year. The Student Services Coordinator will ensure that students are scheduled in a manner that allows for implementation of the services identified on each students IEP.

All clinicians will comply with FERPA and will provide a range of services including evaluation, participation in team meetings, development and generation of the IEP/Section 504 plan, treatment and remediation and collaborate with Academy staff.

Student Performance Standards

1. *Describe the student performance standards for the school as a whole.*

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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.*

AOC - The information we have provided in this section is similar to content provided by other applicants partnering with CSUSA.

The Academy will adhere to all state accountability and testing requirements, including administration of state math, reading and science assessments, currently the READY End-of-Grade (EOG) and End-of-Course (EOC) Assessments. The School will also administer any alternative assessments as appropriate. Third grade students who do not pass the 3rd grade reading EOG and do not meet any of the good cause exemptions outline by the state will take the Read to Achieve test. The Academy will administer assessments that mirror the state-mandated assessments in order to ensure adequate progress and preparation for every student.

* Benchmarks tests, which include three administrations in the areas of English/language arts, mathematics, and science. NWEA currently provides the Measures of Academic Progress (MAP) and the MAP for Primary Grades (MPG).

o NWEA MAP: tests students with engaging, ability-appropriate content aligned to Common Core. NWEA is an adaptive assessment; therefore as a student responds to questions, the test difficulty adjusts to the level of the student.

o NWEA MAP for Science: Aligned with science state standards, test items are helpful for assessing students up to and including 10th grade, prior to more specialized science curriculum in upper high school, and measures the following critical areas: 1) General Science, which covers specific science concepts within the three major domains of science: life sciences, earth and space sciences, and physical sciences. 2) Concepts and Processes, which measure a student's performance in both the processes used in science and the major themes underlying the science disciplines. Administration of MAP for Science is required in grades 5 and 8, but the School will have the option of offering this assessment to other grade levels if necessary.

* Common Assessments: The EMO will provide monthly "common assessments" which are created from a data bank and disseminated to schools to gauge students progress on mastery of the GVC. The assessments are aligned to state standards, and include short-term review, as well as spiral review, to check for mastery. This provides a uniform tool to monitor progress towards mastery of grade level standards more frequently between benchmark assessments administered by NWEA.

* Weekly Standards Assessments/IFP Assessments: include objective-based questions that are used for quick check of content material as well as essay questions that require critical thinking and writing skills. These assessments are aligned to the curriculum maps and measure mastery of standards included in the unit.

Other formative assessments used in the classroom may include:

- * Achievement of goals and objectives in the students PLP
- * Quarterly progress summaries

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- * K-2 Skills Checklists
- * EasyCBM
- * DIBELS
- * Running Records
- * Oral Reading Fluency Checks
- * Journals
- * Teacher observations
- * Anecdotal records of the students performance
- * Attitude inventories
- * Tools within software programs

The data is used to develop Personalized Learning Plans and Progress Monitoring Plans, both described previously, to ensure students are on track to mastery of standards for the year. This data is analyzed during weekly or bi-weekly data chats with the leadership team to determine action steps to help the students improve, or make adjustments in school-wide initiatives for the current or following year.

Students are expected to meet adequate levels of performance in reading, writing, mathematics, and science for each grade level. These levels of performance will be used to identify students who must receive remediation and may be retained. No student may be assigned to a grade level based solely on age or other factors that constitute social promotion. Various indicators, including but not limited to, multiple measures using appropriate grade level assessments, as well as teacher judgment, will be used to determine performance levels. Teacher judgment factors may include, but are not limited to the following:

- * previous retentions;
- * observations;
- * checklists;
- * student portfolios;
- * classroom assessments; and/or
- * current grades

The teacher, parent, and principal will work together to ensure a plan is in place to prevent retention during the school year. Students in grades 3-8 will also take end-of-year state assessments in grades 3-8 in reading and math, as well as science state assessments in grades 5 and 8, in order to provide more evidence for evaluating student performance. Third grade students who do not pass the end-of-grade assessment for reading are subject to additional requirements under the state's Read to Achieve law. The ultimate decision for promotion or retention is made by the principal.

Middle school students need to achieve a grade of "D" or higher in English Language Arts, Math, Science, and Social Studies in grades 6, 7, and 8 in order to be promoted to high school. Students in grades 6 and 7 who fail a subject will have the opportunity to participate in course recovery in order to get back on track. Middle school students will also take an elective and physical education course at each grade level, but those participating in course recovery or intensive reading or math may waive their elective course.

Unless a special education student is on an alternative curriculum per the student's IEP, that student would be held to the same policies in effect for general education as well.

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Promotion criteria will be communicated to parents by distributing the Pupil Progression Plan at the start of the school year. Parents will be kept informed of the child's progress in writing twice quarterly: once via a progress report at mid-quarter, and secondly via a report card distributed at the end of each quarter. Parents will also be notified of the child's benchmark scores after each administration of the assessment. They will have constant online access to their child's grades through PowerSchool and may schedule conferences and contact the teacher as necessary. Students who are "at-risk" for retention will have a Progress Monitoring Plan developed by the teacher and signed by parents after the first sign that the child is below grade level to monitor interventions and their effectiveness. The plan is updated at least quarterly in writing and progress is communicated more frequently in an informal manner.

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.*

To align with our mission of building a student-centered learning environment, we will implement Responsive Classroom for grades K-5, and Developmental Design for grades 6-8. The Academy will adhere to the guiding principles outlined from the Responsive Classroom program, including the belief that to be successful academically and socially, children need a set of social skills: cooperation, assertion, responsibility, empathy, and self-control, and that knowing the children we teach is important as knowing the content we teach.

Developmental Designs targets the unique needs of adolescents to help them build a love for school and feel like a part of a community at school. The Developmental Designs program targets three main areas: self-management and other social-emotional skill building; relationship and community-building; and academic skill building. When used with fidelity, this program promotes the development of students into responsible citizens as they grow through adolescence, which leads to conscientious decision-making with regard to their academic success.

As stated in previous sections, every instructional minute needs to be accounted for to meet the academic needs of students. This is the same in consideration of the students behavioral needs as well. To prevent misbehavior and keep students focused on learning, the teachers will have to utilize highly engaging teaching strategies and minute-by-minute

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instruction. The first two weeks of school will include training on highly structured procedures step-by-step routines for any task ranging from lining up for lunch, to sharpening a pencil, to gathering materials for the start of a lesson. These procedures are taught until they are second-nature for the students, and are continuously implemented throughout the school year with fidelity in order to keep the students focused on academics and instruction, not distracted by poor behavior.

The Code of Conduct will be provided to parents and students prior to the start of the school year to ensure all families are aware of the possible consequences that will be faced if a student chooses to misbehave in school. It will outline and define the infractions that may lead to suspension and expulsion, as well as other in-school consequences. Depending on the severity and situation of each case, the following offenses may lead to a consequence that ranges from in-school disciplinary action to suspension:

- * Infractions of class/school rules
- * Contraband items (i.e. lighters, matches)
- * Integrity (i.e. cheating, forgery)
- * Trespassing
- * Inappropriate Interpersonal/Sexual Behavior (including harassment)
- * Disrespect and Noncompliance
- * Use of Electronic Devices
- * Gambling
- * Harassment, Abusive, Offensive Language
- * Bullying
- * Hazing
- * Physical, Written, or Verbal Aggression, or threat of
- * Unjustified Activation of a Fire Alarm or other system
- * Theft or Destruction
- * Possession of Weapon, Tobacco, Narcotics, Alcohol, or Controlled Substance

We may, upon recommendation of the principal, permanently expel from the school any student older than 14 years of age whose behavior indicates that the students continued presence in the school constitutes a clear threat to the safety of other students or employees. Students will be granted due process rights, including the opportunity to file a grievance for a hearing before the board , in accordance with the state for suspensions and expulsions.

While it may be necessary for students with disabilities to be suspended or expelled from school, before those students can be suspended for more than ten school days in a given school year a manifestation determination meeting will need to be held to allow the IEP team to decide if the students disability caused the misbehavior. The outcome may impact any further disciplinary action taken related to the student, as we would need to ensure that the student was not being denied FAPE.

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Section III: Education Plan Concerns and Additional Questions		
Detailed information related to instructional methods was not included.	Kebbler Williams	Instructiona
The assessment plan is not clear and does not show how it will be aligned with state standards. The application does not include a list of assessments to demonstrate an appropriate evaluation process (no universal screen er has been identified although mentions a diagnostic will be used to group students.) No discussion of how personal learning plans will be used or monitored, revised or how instructional focus plans will be used or monitored, revised or created. There is no plan, systems, structures, processes for how the school leaders will evaluate the effectiveness of the academic program or plans on how, if necessary, it can and would be revised to better suit student needs. The applicant does not describe the instructional methods/strategies to be used and how they align with stated mission, tied to the curriculum and desired student outcomes and assessments.	Tracy Kelley	Instructiona
The assessment strategies should be outlined in greater detail. Formative and summative assessments should be administered coupled with daily and ongoing data analysis.	Greg Schermbeck	Instructiona
Appendix B is attached but should provide additional details. The related units and objectives should be listed for each grade level. There should also be a clear connection between their curriculum with the NCSCOS. Appendix C is not a sample calendar but rather a list of details. A full calendar and related details should be provided.	Greg Schermbeck	Curriculum a
Instructional strategies are unlikely to result in high outcomes for kids as they are not calibrated to activate higher order thinking. There is no indication that students will be intentionally given the opportunity to examine, analyze, or interpret information; form predictions, express their point of view and support it w/ evidence (critique, defend, justify). There is no deliberate focus on giving student opportunities to apply new information by solving problems to deepen their understanding via activities like change, apply, construct or manipulate. The sample scope/sequence does not provide materials or identify resources. There are no details supporting the conclusion that the curriculum framework aligns with stated mission, especially pertaining to blended learning, individual learning plans. The description of the curriculum presented does not provide sufficient detail regarding alignment, objectives, content, instructional strategies, material and resources. Application does not effectively connect the proposed instructional practices with the schools mission nor describe how the instruction will be differentiated in the classroom to meet the needs of all students (AIG and at risk tier D)Research to support the proposes instructional practices is limited and not aligned to stated mission.	Tracy Kelley	Curriculum a
Fourth quarter ends on May 29th, but the last day of school for students is June 11th, following a May 21 - June 11 testing window. What will be done during this time besides testing? Is May 31 - June 11 part of the 185 instructional days?	Kebbler Williams	Curriculum a
(1) The discussion of ELL students mentions an extended school year. This is the first time this is mentioned in the application. What does ESY consist of for ELL students? (2) What will the school do if the ELL student needs more intensive services than the mainstream/inclusion model provides?	Kebbler Williams	Special Prog
Specific information should be provided regarding how instruction will differ for academically gifted students. Data analysis should also occur more frequently than every quarter.	Greg Schermbeck	Special Prog
Concerns: 1) Referral process 2) 504 plan requirements (not part of special education) 3) Role of the IEP Team 4) Parental consent Questions: 1) What is the plan if a parent makes a referral for special education testing? 2) What is the responsibility of the IEP team, specifically in the referral and eligibility processes? 3) When is parental consent required? 4) Is there be a requirement before a teacher can refer a student? If so, what is the requirement? (Policy does not state there has to be a "required component" before a teacher can refer a student for evaluations.)	Leigh MObley	Exceptional

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Additional information should be provided regarding FAPE and other services and programs that will be provided.	Greg Schermbeck	Exceptional
Concerns: 1) Lack of information on the continuum of services 2) Clinical services (unclear what this means) QUESTIONS: 1) How will the school provide the continuum of services, including resource and separate setting? 2) What is the license requirement for EC teachers?	Leigh MObley	Exceptional
(1) No student performance standards are included here. (2) The exit standards for the last grade served do not include what students should know and be able to do. (3) If a student chooses not to waive his or her elective, when will he or she participate in course recovery or intensive reading or math?	Kebbler Williams	Student Perf
The applicant does not provide details on a plan to monitor progress toward meeting the goals of the school. There is no plan details relating to how the school will evaluate the effectiveness of the academic program. There is no evidence (structures/PD, planning time, processes, systems, person responsible) that data will be used effectively to drive instruction and improve curriculum over time. performance standards are not SMART.	Tracy Kelley	Student Perf
Performance standards should be more specific. These goals should set specific benchmarks that are clear for both students and teachers. There should be clear benchmarks for each content and for each grade level. Appropriate evidence is provided for assessment tools and promotion to the next grade level.	Greg Schermbeck	Student Perf
Applicant does not provide details on how the school policies, practices, structures will incorporate Responsive Classroom program and reflect everyday the social skills of cooperation, assertion, responsibility, empathy, and self control. There is no articulation of how school will build a school community, establish a common language, shared values, or core principles. There is a profound lack of intentionality around what will be celebrated, or how or what positive behaviors will be recognized and negative behaviors discouraged. There lacks a cohesive nurturing environment that includes developmentally and linguistic creeds, mottos, chants, slogans, or pillars, school colors, mascots etc. There is no alignment between the mission "student-centered" environment. Student handbook articulates discipline policies and procedures that are not aligned to stated responsive classroom or developmental design as articulated in application.	Tracy Kelley	Student Cond
The information regarding discipline for students with disabilities is incomplete according to NC policy 1504-2. The purpose of the manifestation determination is not defined correctly. This section should include students not yet identified but suspected of having a disability and services required after the 10th day of suspension.	Leigh MObley	Student Cond
The student conduct plan should be more specific and explain the framework of how students will be held accountable throughout the school year. The applications lists specific behaviors that are unacceptable and potential consequences yet it's unclear how those consequences will be decided upon. Acceptable behaviors and related consequences should be clearly outlined in order for faculty, students, and teachers to understand. A draft handbook is attached but is the same as other CUSA handbooks. It should be tailored to the specific needs and demographic of each proposed school.	Greg Schermbeck	Student Cond
(1) Definitions of offenses which may result in suspension or expulsion are not included. (2) How is the requirement to purchase an agenda for \$10 not the same as charging a fee? (3) Is a long-term suspension a reasonable consequence if a student has a Red Bull or Monster Energy Drink? (4) The student handbook needs to be specific in describing the process of a student requesting a hearing in case of suspension. (5) There are two sets of consequences for uniform violations in the student handbook. Which is correct? What supports are in place to help parents pay for uniforms who are financially unable to pay? (6) ID badges are mentioned under money collection in the student handbook. Are	Kebbler Williams	Student Cond

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<p>students required to purchase ID badges also? (7) The school is planning to follow the NC DPI Pupil Progression requirements for students in grades K-7, but does not explain what this means in the student handbook. (8) Page 34 of the student handbook mentions that complaints will be handled according to Florida Statutes. What about NC Statutes?</p>		
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Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Pass
Leigh MObley	Fail
Becky Taylor	
Eric Sanchez	
Kebbler Williams	Pass
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Pass
Tracy Kelley	Fail
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

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IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Triangle Charter Education Association

Mailing Address: 7917 Bluffridge Drive

City/State/Zip: Raleigh NC 27615

Street Address: 7917 Bluffridge Drive

Phone: 919-846-3443

Fax: 919-846-3443

Name of registered agent and address: Ernest Allen Taylor, Jr.
7917 Bluffridge Drive
Raleigh, NC 27615

FEDERAL TAX ID: 90-1031905

Tax-Exempt Status 501 (c)(3)

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

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

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

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

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

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Kim Brown	Vice President	WAKE	Software Engineer		
Allen Taylor	President	WAKE	Marketing Executive		
Ted Sherburne	Treasurer	WAKE	Managing Consultant		
Judy DuPre	Secretary	WAKE	Retired Educator		
Elaine Shamel	Director	WAKE	Retired Educator		

Please provide the following in this location of the APPLICATION:

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

Cardinal Charter Academy of Knightdale will be governed by the Triangle Charter Education Association, Inc. We have partnered with CSUSA and plan to implement their educational and operational model, we understand and take seriously our responsibility as board members for developing and outlining the mission, vision, and values of the Academy and developing the appropriate policies to ensure those fundamentals are maintained. We shall be responsible for the legal and financial obligations of the Academy and will ensure that the Academys programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements. We will continue to uphold the mission and vision of the Academy through visible leadership and stewardship of the Academy, including the following:

- * Communicating the mission and vision of the Academy to the community
- * Holding CSUSA accountable for achieving the mission and vision of the Academy
- * Participating in fund raising and other community events on behalf of the Academy
- * Setting, approving and monitoring the school budget
- * Reviewing and approving the monthly financials making adjustments as needed
- * Reviewing school performance
- * Monitoring the overall health and viability of the Academy
- * Communicating with the community and state Board of Education
- * Monitoring progress toward goals
- * Operational oversight of CSUSA
- * Hiring of teachers
- * Strategic planning
- * Ensuring compliance with all local, state and federal reporting requirements

Under the terms of the management agreement, CSUSA shall consult with the board with respect to the hiring of the principal. We will use a robust recruiting process called the Leadership Assessment Center. This process is used to determine if a candidate would be a good building leader and is an important component of the interview process. Qualified candidates participate in this one-day event which includes a technology activity,

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essay writing sample, personality quiz, self-assessment and an interview. Candidates that participate in this event may be invited into the pool of approved candidates for consideration. The board is included in the final decision making process in an effort to support a positive working relationship between the principal and the board. The principal will be employed by and report directly to CSUSA. A strong relationship will exist between the principal and the board. The board will ultimately hold the principal accountable through the performance expectations defined by the board and through the management agreement between the board and CSUSA. The principal will provide a monthly status report for the board at monthly board meetings which will include educational, enrollment, personnel, technology, facility and various other operational reports. The principal will attend all board meetings and field any questions of the board members and conduct follow-up action items as necessary. Board members will be given the opportunity to provide input on the principals performance and CSUSA will remove the principal if the board is reasonably dissatisfied with his/her performance.

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

The board is comprised of six respected leaders in Wake County who have skill sets and advanced degrees in the fields of education, business, finance, technology, and marketing. Their resumes include accomplishments such as: leading quality assurance/regulations team to receive a 4-year accreditation from the National Board of Accreditation and recognized by NC state regulatory agencies for excellence; leading strategic goals and performance outcomes; leadership training; community development and outreach programs; successful grant writing; mentor coordinator for Wake County Schools; School Improvement Chair; Testing Coordinator; large scale project management assignments and Project Management Delivery Excellence Awards; management of national public relations campaign; and the development of numerous press releases and presentations for state and national leaders.

Board members shall not have the authority or ability to formulate or implement policy on an individual basis and all decisions shall be made collectively in accordance with board procedure.

The Academy will have a Parent Teacher Committee (PTC) that will meet on a regular basis. The PTC will work closely with school administration and the board to identify opportunities for school programming, fundraising, and special events to meet the needs of the school and its students. Given the areas of expertise represented by the governing board members, the active parental participation through the PTC, and the day to day oversight of CSUSA, there will be active and effective representation of key stakeholders.

The board will evaluate the success of the Academy and the principal by continuous monitoring, quarterly, semi-annual and annual surveys and active and effective representation of all stakeholders to ensure that the school will be an educational and operational success.

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- 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?*

Triangle Charter Education Association Inc. board members have been organized since December 2012, and currently hold the charter for Cardinal Charter Academy (opened August 2014). The founding board members were joined together through the efforts of the board chair; Allen Taylor, Jr. who was instrumental in holding several organizational meetings with individuals in the community that had an interest in bringing a high quality charter school option to Wake County. Board members were selected based on their educational and/or business experiences with an effort to ensure that all areas of oversight are met (financial, educational, and operational).

Our board is focused on maintaining members who hold the same heartbeat of the schools mission, behold the commitment to the community, and have the ability to provide board governance duties as a whole. Our board is presently comprised of six members with plans to expand to seven members once a qualified candidate has been identified.

Vacancies on the board will be filled at the annual meeting of the board by a vote of a majority of the directors then in office. The annual meeting is scheduled to take place in March of each year. However, if a vacancy results in the board having less than five members or it is otherwise determined that it is desirable and in the best interest of the Academy to fill a vacancy before the next annual meeting, then a board recruitment/selection committee shall be formed by at least two board members to search for qualified candidates to present to the entire board for consideration. Any two members of the board may call a special meeting for the purpose of filling the vacancy. The vacancy may then be filled at a special meeting by a vote of the majority of the directors then in office.

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

Our board meets monthly in accordance with our Bylaws.

Annual Board Strategic Planning Meeting will be held in October and our Annual Meeting is scheduled in March.

- 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).*

AL

New board members will receive orientation upon joining the board and will be provided with a comprehensive binder containing copies of the board articles of incorporation, bylaws, charter contract, management agreement, board minutes, and other pertinent information.

Board members will participate in ongoing professional development which will be provided by the boards legal counsel, Donna Rascoe, Esq. Professional Development shall also include attendance at annual conferences and regional workshops offered by the Alliance for Public Charter Schools as well as the NC Public Charter Schools Association. In addition, board members have been and will continue to participate in the board training

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workshops provided by the Office of Charter Schools. Below is a timetable covering training and professional development to be provided by the boards legal counsel:

April through June: Roles of the Board, Parliamentary Procedure, Drafting Board Policies

July through September: Review of Open Meetings Law, Reading a Financial Statement

October through December: Charter School Law, Guided Questions for Mission Statement and Strategic Planning

January through March: Models of Governance and Leadership, Review of Bylaws

- 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.*

Triangle Charter Education Association Inc. has an existing Conflict of Interest Policy in place (see Appendix. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations. A board member shall inform the board of any direct or indirect conflict of interest which the member has with regard to any transaction contemplated by the board. A conflict of interest shall exist in board actions including, but not be limited to, actions concerning a transaction in which the member: (a) has a material financial interest; or (b) is presently serving as a director, trustee, officer, or general partner of another party. Pursuant to the provisions of Section 55A-8-31 of the North Carolina General Statutes, the board member with a conflict of interest may participate in the discussion, but may not vote on the transaction. The transaction is authorized, approved, or ratified by the vote of a majority of the members in office who have no conflict of interest (which must be more than one member) and when a majority of members who have no conflict of interest so vote, a quorum is deemed to be present at the meeting for purposes of that vote. There are no existing relationships that could pose actual or perceived conflicts of interest if the application is approved. Board members will have no financial interest in the school. In addition, board members are independent of CSUSA and no employees of CSUSA will sit on the board.

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

The board has policies in place for our existing school, Cardinal Charter Academy. We will develop policies with the support of the principal, school staff, and legal counsel, when necessary. All policies will be created after researching best practices and using proven systems to guide our work. When appropriate, parent focus groups will be formed to gather input. Policies will be presented to the full board to allow for open discussion and collaboration at a public meeting and then brought to a vote for approval. Policies will be provided to parents via the Student Handbook and will also be made available through the student information system. Academy policies will be reviewed annually to ensure compliance with federal and state law as well as local regulations and policies.

- 8. Describe any advisory bodies, councils, or associations listed in the organization chart or to be*

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formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.

Parent Teacher Committee (PTC)

The board believes that active parental participation is essential to operating high quality charter schools. Parent participation is the key to the success of the overall program and will be solicited for the development of school goals and objectives. A Parent Teacher Committee will be established to provide a voice for parent and community input that can be used in the development of the Academy as well as programs. The PTC will be organized each school year at the Academy. The PTC shall be comprised of parents of enrolled students, administrators and teachers. The PTC will report directly to the principal.

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

Parents may bring complaints to the school administration of the Academy at any time. It is the responsibility of the leadership team to work to understand the concern. The boards policy holds that academic concerns are first discussed with the teacher. If the parent determines that the concern has not been adequately addressed, then the parent must make an appointment with a member of the Academys administration. If after a discussion with administration and ample time is given to address the concern the parent has determined that the concern has not been addressed, the parent may contact CSUSA as well as the board. It is our desire, in partnership with CSUSA, to create the best learning environment for each student, including working to resolve concerns parents have regarding their childs academic environment. When a staff member believes a work condition or treatment is unjust, inequitable, a hindrance to effective operation or creates a problem; he or she is encouraged to discuss the condition or treatment with school administration. School policy provides for alternative lines of communication when the employee has such issues with his or her direct supervisor. If the teacher or staff member feels he or she has been treated unfairly as a result of actions from the schools administration, the employee can present a formal grievance with CSUSAs Corporate Human Resources Department. A further investigation will be conducted. CSUSA will report violations of ethics or misconduct as required or deemed necessary. Misunderstandings or conflicts can arise in any organization and should be resolved before serious problems develop. Most incidents resolve themselves without formal intervention. However, should a situation persist that the employee believes is detrimental to himself/herself or the board, the employee should follow the procedure described here for bringing the complaint to school administration and/or CSUSAs Human Resources Departments attention. If the aggrieved employee is not satisfied with the outcome, the employee may request a review of the matter by the board. The board will review the written documentation and decisions from and in consultation with the administration and CSUSA, will issue a final written decision.

Cardinal Charter Academy of Knightdale will follow the boards approved Grievance Policy which is currently in place for Cardinal Charter Academy for (See Attached Appendix J).

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*

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authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils).

(Appendix F)

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

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

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

Not Applicable

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

Name of the Company: Charter Schools USA
Address: 800 Corporate Drive, Suite 124
Fort Lauderdale FL 33334
Website: charterschoolsusa.com
Phone Number: 954-202-3500
Contact Person: Sandy Castro
Fax: 954-416-4027
Email: scastr@charterschoolsusa.com

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

The board has an existing contract with Charter Schools USA to manage Cardinal Charter Academy. We are extremely pleased with the successful opening of our first school and the support services we have received from our educational partner and look forward to working with them in developing and operating our second school, Cardinal Charter Academy of Knightdale.

We have observed, through site visits to CSUSA-managed schools and also by attending their annual Summit, that CSUSA manages schools with a personal mission by providing the most consistent and research proven instruction. They excel at teacher training and support and above all have an exceptional educational program.

CSUSAs assistance in marketing our initial school has exceeded our expectations. Our first school is fully enrolled with a waiting list large enough to fill two additional schools. CSUSA delivered a state-of-the-art facility on time and our teachers and students had all the resources needed

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on day one. Its Education Support Team worked closely with the principal to ensure all textbooks and curriculum resources were ordered and teachers were property trained. Its Finance Team worked closely with our schools business manager to ensure all reporting systems were in place.

There is a reporting mechanism in place for educational, financial, and operational updates during monthly board meetings, and a support team at CSUSA that works closely with our school staff and administration to ensure we are on task and working toward meeting our educational and financial goals.

Our relationship with CSUSA is governed by a performance-based management agreement. The board has engaged Donna Rascoe, Esq. as independent legal counsel and has been working with her since the boards inception. Board members have worked closely with legal counsel to review and negotiate the terms of the management agreement prior to execution (see Appendix L).

2. *What other EMO/CMOs were pursued and why did the applicant select this particular one?*

Please include information regarding other management organization's fees and financial/academic records that led to the selection of the proposed EMO/CMO as the best fit for this proposed school.

The board currently contracts with CSUSA to develop and operate Cardinal Charter Academy (opened in August 2014). We have been working closely with the CSUSA development, education, finance, and operations teams and are satisfied with the delivery of services and plan to continue this partnership with CSUSA for our future schools. We have not recently compared CSUSA to other EMOs due to our existing relationship and level of satisfaction with their delivery of services.

Making our decision two years ago to partner with CSUSA, we note that strong academic performance of CSUSA schools was the primary factor in selecting them.

In Louisiana, the CSUSA-managed charters (that have been open for longer than one year) are proving to be high quality schools of choice that meet or exceed their peer and neighborhood schools across various performance metrics. In Florida, the Department of Education (FLDOE) has designated 15 CSUSA schools as "High Performing Charter Schools." The designation means that the FLDOE has verified the following criteria: the school received at least two school grades of "A" and no grade below "B" for the last three years; the school received an unqualified opinion on each annual audit in the most recent three years; and the school did not receive a financial audit that revealed any of the financial emergency conditions set forth in statute.

CSUSA has a large support staff that provides services to its schools across all areas needed to successfully operate a charter school. This includes a team of Regional Directors and Managers including Finance, Education, Facilities, Operations, Marketing, Enrollment and Human Resources. CSUSA works closely with the board to support the infrastructure needed to ensure adequate school resources.

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

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achievement?

The board selected Charter Schools USA, Inc. to manage Cardinal Charter Academy at Knightdale. CSUSA currently operates 67 traditional charter schools and 3 turnaround schools in 7 states nationwide, serving almost 60,000 students. All of CSUSAs schools are AdvancED accredited. More than half of CSUSAs students receive free or reduced lunch and over 70% of students are classified as minorities. Of CSUSAs schools that receive traditional A-F grades, over 50% earned an A or B in 2013. Currently, only Florida has released 2013-14 results for non-high schools, and 70% of CSUSAs Florida schools earned an A or B.

The 2013-14 school year was also the first for two CSUSA-managed charter schools in NC, Langtree and Cabarrus Charter Academies. As of the Sept. 4, 2014, release of EOG results, both Langtree and Cabarrus exceeded the performance of North Carolina and their respective school districts in all EOG subjects, school-wide. In reading proficiency, Langtree and Cabarrus outperformed the state by more than 18% points and their districts by 17% and 12% points, respectively. Math performance was similarly high, with both schools exceeding the state average by more than 18% points and their districts by about 15% points. The trend continues when the sample of schools is limited to those in a five mile radius.

CSUSAs three turnaround schools in Indiana are their lowest performing in the network. Managed only since 2012-13, more than 90% of the students qualify for free and reduced lunch and the student body is 53% minority. Collectively, the Indianapolis schools made outstanding progress this year, far exceeding one years annual growth on NWEA MAP assessments. In math, 172% of growth targets were met, the equivalent of over one and a half years worth of growth. In reading, students made over two and half years worth of growth with 275% of growth targets met. At the time of submission, publically available 2014 assessment results are limited, though preliminary results are indicative of CSUSAs focus on growth for every student. At the middle school level, both schools maintained or exceeded prior year performance in reading and math. Algebra performance increased by over 10% points in middle school and by over 20% points in high school. Early ELA end of course results show that for the first time an Indianapolis turnaround school has crossed the critical 60% proficiency threshold.

Some of CSUSAs highest performing schools are in Florida where schools range from FRL populations of 15% to 87% and minority rates of 41% to 98%. The diversity of CSUSAs Florida schools and their success with all student populations illustrates that regardless of student demographics, the CSUSA Education Model works. The key factor is time. When students come to school 2 or more years below grade level they can make significant progress and growth without tipping the proficiency scale. Thus, student performance and grade-level mastery increase the longer students and schools are part of the CSUSA family. While proficiency increases with school tenure, annual growth is elevated in developing schools. Second year Florida charter schools partnering with CSUSA performed did especially well in 2014, with an average increase of 7% points in math proficiency, 3% points in reading and 23% points in writing. As a district, CSUSAs Florida schools exceeded state reading, math, science and writing proficiency. Additionally, their net proficiency growth was almost 10 times higher than the state in 2014.

4. *Describe how the governance structure will be affected; if at all, by the EMO/CMO and*

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particularly discuss how the board of directors of the charter school will govern the school independently of the EMO/CMO.

The relationship between the board and the EMO is codified with a performance-based contract. The executed management agreement between the board and EMO outlines the duties and responsibilities of each party and the specific performance requirements of the EMO.

The board shall independently adopt a comprehensive budget on an annual basis, which shall include all forms of revenue and all expenditures. Amendments to the budget will require the approval of the board. On a monthly basis, the EMO will provide to the board an accounting of all school revenues and expenditures. In addition, the EMO will report on a monthly basis the current student enrollment of the Academy and the number of students on the waiting list if any. The Academy EMO will make available provide monthly financials, which will include a statement of revenues and expenditures prepared in accordance with generally accepted accounting principles.

The EMO will be responsible for the day-to-day financial management of the Academy, subject to the budget and oversight of the board. The board will be responsible for overall policies regarding school governance, academic, personnel, discipline and grievance policies. It is the boards responsibility to hold the EMO responsible for the successful operation of the Academy and its ability to deliver academic results.

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

Teachers will be jointly employed by the board and CSUSA, and administrators and staff will be solely employed by CSUSA. This arrangement is necessary for the administration of employee benefits and pay and does not reduce the boards authority to hire and fire teachers, and complies with N.C. Gen. Stat. 115C-238.29F(e)(1). This type of arrangement was has been reviewed and approved by legal counsel for the Department of Public Instruction and the State Board of Education and has been in place for other EMO-managed charter schools, prior to the submission of this application.

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

The management agreement outlines the EMOs responsibilities to the board for the operation and performance of the Academy in accordance with the charter contract and the performance criteria outlined in this charter application. The EMOs responsibilities to the board include (but are not limited to):

- * Timely submission of required reports as set forth in the management agreement and in the charter contract;
- * Strict adherence to the approved annual budget for the operation and management;
- * Performance goals stated in the charter application and the charter contract.

The management agreement contains an article that outlines the reasons for which the board may terminate the management agreement. Please refer to the management agreement attached as Appendix L.

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

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

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8. *List the fund balance and surpluses for each school managed by the EMO/CMO over the last three years in North Carolina.*
9. *Provide as Appendix N the financial history and statements of the EMO/CMO over the last three years. Specifically, if contracting with an EMO provide confirmation that the EMO is in good financial standing with either financial statements, bank letter, D & B report or credit rating.*

Currently the EMO manages three charter schools in North Carolina. One of these schools, Cardinal Charter Academy just opened in August 2014. The other two schools opened in 2013. Langtree Charter Academy located in Mooresville has a fund balance of \$10,000. Cabarrus Charter Academy has a zero fund balance.

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.

Not Applicable

1. The proposed charter school will be governed by an existing charter school board
2. Describe the rationale for replicating the application based upon the success of another charter school. Include documentation and evidence that the existing charter school model is successful in student achievement, charter school governance, and fiscal responsibility. Base this explanation upon academic data available through state and national summative assessments, financial audits, and state compliance reports.

TCEA currently has a partnership with CSUSA, who manages Cardinal Charter Academy as well as two other North Carolina schools. We have determined that those schools and the CSUSA education model they use are what we want to replicate for students in our community.

Under the guidance of a governing board, CSUSA has successfully developed two NC charter schools, Langtree Charter Academy and Cabarrus Charter Academy, both schools opened in 2013 and students at both schools performed at levels that exceed county and state proficiency averages in many grades and subjects (see Appendix U). Hollywood Academy of Arts & Science (HAAS), a CSUSA-managed school in Florida with similar demographics to that of our proposed community, has also exhibited academic performance levels that exceed the local district and state proficiency levels. Success at these three schools is due to the strength of the CSUSA model that we have chosen to replicate in this application. The academic results, charter school governance, and fiscal responsibility described below support our belief that CSUSA is a successful model to replicate.

In 2013-14, academic performance, as measured by proficiency rates, at the two NC schools outperformed both the district and state averages in grades 3rd through 6th in Reading, Math and Science. Please refer to Appendix U for detailed academic results.

Governance of these three schools are highly effective. These boards exercise fiduciary responsibility, ensure accountability, and use best practices to ensure that budget and policies are aligned to the schools mission. The Boards ensure that the schools programs and operations are faithful to the terms of the Charter including compliance with statutory and regulatory requirements.

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Each of these schools financial affairs are in good standing and have clean audits with unqualified opinions. HAASs audited fund balance for the past two years were \$1,078,492 and \$1,559,927 respectively.

3. Depict and analyze the current enrollment trends and student demographics of the replicated charter school model over the past three academic years.

The board has chosen to work with this particular EMO due to their ability to establish in North Carolina a replication model for a high performing charter school. The 3 schools mentioned in the previous response to be utilized for replication demonstrate CSUSAs ability to enroll a charter school.

Hollywood Academy of Arts and Science Charter School has been fully enrolled for over the past three years with 1,500 students in grades K-8. The schools student demographics are as follows:

- * Native American: 0.13%
- * Asian/Pacific Islander: .67%
- * African American: 9.78%
- * Hispanic: 36.73%
- * Multi: 4.26%
- * Other: 6.32%
- * Caucasian: 39.52%
- * Unknown: 2.59%

Cabarrus Charter Academy enrolled 924 students in grades kindergarten thru seventh grade in its second year. Demographics are as follows;

- * Asian/Pacific Islander: 3.31%
- * African American: 2.54%
- * Hispanic: 34.10%
- * Multi: .69%
- * Other: 2.54%
- * Caucasian: 56.81%

Langtree Charter Academy enrolled 912 students in grades kindergarten thru seventh grade in its second year. Demographics are as follows;

- * Native American: 0.66%
- * Asian/Pacific Islander: 11.03%
- * African American: 4.37%
- * Hispanic: 6.44%
- * Multi: 5.02%
- * Other: .76%
- * Caucasian: 71.72%

The trend of steadily increasing student membership at CSUSA can be seen from the data listed below. 2011-2012 is included as a benchmark year.

2011-2012

- * Enrollment: 24,402
- * Wait Lists: 14,194

2012-2013

- * Enrollment: 37,651 (54% increase from prior year)
- * Wait Lists: 8,908 (37% decrease from prior year. The decrease is attributed to such a large amount of growth and increased capacity in a single year.)

2013-2014

- * Enrollment: 46,678 (24% increase from prior year)
- * Wait Lists: 18,838 (111% increase from prior year)

2014-2015

- * Enrollment: 56,702 (21% increase from prior year)
- * Wait Lists: 23,217 (23% increase from prior year)

Each schools student body represents the area/community directly surrounding

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it. The Academy will comply with NCGS 115C-238.29F(g).

4. Explain why the governing board of the proposed charter school is a good fit for the proposed student population as noted in Section II Mission and Purposes.

Our board is composed of a balanced skill set that includes educators, marketing executives, business operations, information technology and finance. With these skills, we are capable of evaluating and guiding toward the desired performance outcome aligned with the schools mission. We are passionate about providing quality educational options to all of Wake County. Due to the successful opening of our first school, we are confident that we can reproduce this success for a secondary school in the Knightdale community. We agreed that a charter school in Knightdale would provide a great opportunity for these students and for the community. Knightdale is a small town that has lacked resources and the schools in that area have struggled over the last few years. Our board is committed to bringing high quality charter schools to areas of Wake County where there is an obvious need for improvement. Board members are actively engaged in the business community through the Knightdale Chamber of Commerce which offers them an opportunity to begin networking and building relationships for future partnerships for the school. Elaine Shamel and Judy DuPre, both retired educators are very familiar with the Knightdale community through their previous service to Wake County Public Schools. As a board, we are committed to making a difference in this community and are committed to making a difference in the lives of these children for years to come.

5. Provide a copy of the organization's IRS Form 990 for the last three years as Appendix T

Projected Staff:

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

Principal

Assistant Principal

Dean of Students

Business Operations Manager

Administrative Assistant

Receptionist

Enrollment Manager

Student Services Coordinator

Food Service Director

Food Service Staff

Before/Aftercare Director

Before/Aftercare Staff

Teachers (K-5)

Teachers (6-8) (Math, Science, Social Studies, Language Arts, Reading)

General Music / Chorus Teacher

Art Teacher

PE Teacher

Foreign Language Teacher

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Technology Teacher
Instructional Aide - PE
ECSE/Special Education Teacher
ECSE/Special Education Aide
Reading Specialist
Co-Teacher
Curriculum Resource Teacher

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The board and CSUSA will be an equal opportunity employer and will recruit quality staff throughout the year for job openings using a progressive and innovative recruiting plan. Recruitment will occur locally, state-wide, and nationally through various resources that include:

- * Through the Academys website
- * Charter Schools USAs website
- * Education job fairs to seek teaching professionals
- * College recruiting by identifying colleges and universities, both locally (eg. Wake Technical Community College, Meredith College, Peace College, Saint Augustines College)and nationally in order to attract and hire newly graduated teachers
- * Select educational, professional, and job recruitment websites to advertise and communicate teaching openings
- * Minority referring organizations to help ensure that the work force is reflective of the diverse community served

CSUSA will manage job advertising, conduct applicant screening, and refer qualified applicants to the Academy administration and board (for teaching positions) to ensure the Academys staffing needs are met. A consistent process of screening, interviewing and selecting employees is essential to our ability to recruit qualified staff. A consistent process will ensure that candidates are provided an equal opportunity to demonstrate and/or articulate their skills and abilities. Retention of highly-qualified and effective teachers will be part of each principals annual evaluation system. The principal will be encouraged to set goals and the annual evaluation will be based upon achieving those goals.

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

Teachers will be jointly employed by the board and CSUSA. Administrators and staff will be solely employed by CSUSA. This arrangement is necessary for the administration of employee benefits, does not reduce impact the boards ultimate authority to hire and fire teachers, and complies with N.C. Gen. Stat. 115C-238.29F(e)(1). This arrangement was reviewed and approved by legal counsel for North Carolina Department of Public Instruction and the State Board of Education prior to the submission of this application.

The board intends to contract with CSUSA for the provision of certain management services, including personnel services. As part of those services, CSUSA has provided the attached Employment Handbook to the board for its review and consideration. The board is currently reviewing the employment handbook to ensure compliance with applicable law, including N.C. Gen. Stat. 115C-238.29A et seq. The board expressly acknowledges that the

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employment handbook may need to be revised before it is adopted. However, it is being submitted with this application as evidence that we are working diligently to prepare for final charter approval. A draft of the employee handbook is attached as Appendix O.

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

The board and CSUSA will follow the protocol established for screening school employees, vendors and board members. The school-based Business Operations Manager will be responsible for complying with arranging background and fingerprinting the criminal background check policy of services, which will follow all state and district LEA requirements. Every 5 years, Academy staff will be required to be fingerprinted and pass a criminal background check.

A comprehensive criminal history background check will be conducted on each applicant. The board and CSUSA will also ask legal questions on its employment application in relation to felony convictions, probation, pleadings, and pending disciplinary actions. If a candidate misrepresents information, the board and CSUSA reserve the right to end the hiring process or employment relationship.

The selection process is informed by factors identified in applied psychology, such as interview structure and phrasing of questions, and draws on effective teacher research. Interview protocol focuses on job-related questions and is within the legal bounds of interviewing guidelines. Every hired non-instructional employee will sign an offer of employment with CSUSA. Every teacher will sign an offer letter from CSUSA and a separate letter from the board due to the joint employment structure. Staff will be hired "at will" on a year-to-year basis. Extensions of employment offers are recommended on an annual basis. All instructional personnel will be considered 10-month employees paid over a 12-month period.

The first 90 days of employment are an Introductory Period. During this period, the employee may resign without reason and/or notice and the board and CSUSA may terminate employment without cause and without notice. After the Introductory Period, progressive discipline policies will be followed for minor performance situations and immediate termination for any violations of a serious nature.

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

The Academics salaries are competitive with the surrounding area schools but structured differently, with a greater emphasis on performance-based pay. For base salaries, pay bands have been established to a minimum, midpoint, and maximum scale by which job families can grow with merit increases. The board will work with CSUSA to establish budget criteria, incentives, and other motivating factors that will attract, reward and retain the best employees. A salary worksheet will be used to calculate starting salaries in a fair & consistent manner. As an example of how starting salaries are determined, the table below provides the basic criteria:

\$41,000 Base Salary for Teachers (190 days)

Up to \$2,000 Positive Adjustments to base for Experience

\$1,000 Positive Adjustments to base for Education Credentials (Masters or PhD)

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\$2,000 Positive Adjustments to base for Critical Shortage Areas if applicable

-\$3,000 Negative Adjustments to base if met all requirements and waiting for Certification documentation.

Employees will be offered mandated benefits as follows: Workers Compensation; Unemployment Insurance; and Social Security Insurance. Employees will also be provided benefits with various levels of coverage and premiums to meet their needs. Eligible employees (those working a minimum average of 30 hours/week) are able to participate in the benefits plan on their 90th day of employment and also during the year for qualifying events (i.e. birth of child, marriage, divorce). If benefits are not selected during the employees first 90-days of employment, or within 30 days of a qualifying event, enrollment changes may only be made during our annual "open enrollment" sessions. Benefits available include medical, dental, vision, life insurance, supplemental life insurance, dependent life insurance, short & long term disability, 401k if eligible, Paid Personal Time Off and Employee Assistance Program.

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

The formal procedure for NC employee grievance is as follows:

Grievance Policy (Staff)

When an employee believes a work condition or treatment is unjust, inequitable, a hindrance to effective operation or creates a problem; he or she is encouraged to discuss the condition or treatment with school administration. School policy provides for alternative lines of communication when the employee has such issues with his or her direct supervisor. If the teacher or staff member feels he or she has been treated unfairly as a result of actions from the schools administration, the employee can present a formal grievance with CSUSAs Education Team HR Generalist. A further investigation will be conducted.

Instructions for Staff Submitting a Grievance (Staff)

1. Discussion of the problem with the immediate supervisor is encouraged. Requests for an initial meeting to discuss a grievance must be made within 30 calendar days of the event giving rise to the grievance. The supervisor will schedule a meeting within 5 days of any such request by an employee. If the employee does not believe a discussion with the supervisor is appropriate, the employee should proceed directly to Step 2. The supervisor will provide the employee with a written response within 5 days of the meeting.

2. If the matter is not resolved in Step 1, the employee should request to meet with the CSUSA Regional Director. The CSUSA Regional Director will provide the employee with a written response within 5 days of the meeting.

3. If the matter is not resolved at Step 2, the employee may submit a formal grievance in writing to CSUSAs Education Team HR Generalist within ten days of receiving the Regional Directors written response. The aggrieved employee is encouraged to request a meeting with CSUSAs Education Team HR Generalist. CSUSAs Education Team HR Generalist will conduct an investigation and consider the facts and may review the matter with the aggrieved employees supervisor.

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

In the proposed staffing model, there are no positions with dual

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responsibilities. The board and CSUSA strategically put together a 5 year staffing plan to cover all needs of the Academy so no position will have dual responsibilities. There will be employees that may have additional duties if they choose such as mentoring, professional development, etc. These employees will be paid a stipend (which is included in the budget calculations) in addition to the salary for any additional duties as needed.

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.

Staffing is flexible and subject to change based on the needs of the actual students as identified by the principal and the board. Staffing needs will be constantly monitored, particularly at the beginning of year to enable the Academy to meet the needs of its students and ensure their success.

We plan to hire a Student Services Coordinator to oversee EC compliance, two EC teachers and two EC Aides. This will be based on student needs as indicated in their IEPs and taking into account guidelines for class size (NC 1508-3) and caseload (NC 1508-4). When hiring general education teachers, we will seek to employ teachers who are also certified in ESL, EC, or AIG to allow them to serve a wider variety of students.

We will contract with clinical service providers including but not limited to a speech/language pathologist, occupational therapist, physical therapist, school psychologist, and other professionals as needed to address the students' needs per their IEPs.

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

The board and CSUSA will ensure during the hiring process that 100% of instructional staff hired at the Academy have a North Carolina Professional Educator Licenses of either Standard Professional 1 (SP1) or Standard Professional 2 (SP2).

Before employing any teacher and with the teachers prior written consent, we will obtain from DPI and review a copy of the teachers professional license. The board and CSUSA will assist our teachers in meeting the licensure requirements established by DPI and the Board of Education. We will develop, maintain, and promote a development program for all teachers and instructional staff to progress from a SP1 to a SP2 License. Assistance will be provided to instructional staff as well as the required information and documents needed to make this progression. The employee will be responsible for all fees for license progression and renewals. CSUSA Employee Services and the Academys Business Operations Manager will maintain each employees file with updated licenses and alert all employees of the need to renew their current license with this program.

North Carolinas requirements for teachers from outside the state must be completed for clear renewable certification. These requirements are incorporated into North Carolinas approved teacher preparation programs and must be completed within five years.

All teachers will be jointly employed by the board and CSUSA. The termination of employment of a teacher is subject to review and approval by the board, which retains the ultimate decision to terminate. It is the responsibility of the board and CSUSA to ensure teachers meet the requirements prior to employment and to ensure any conditional requirements are met by the educator within the required timeline.

The board and CSUSA may employ or contract with skilled selected non-certified personnel to provide non-instructional services or to assist faculty members as teachers aides. Teachers will demonstrate content mastery

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in the subject area they are teaching through a state exam, as well as demonstrate successful completion of graduate work, an undergraduate academic major or advanced certification/credentialing. The Academics Student Service Coordinators as well as consultants hired for occupational therapy, physical therapy, speech language, and other services will meet licensure or certification requirements for the services that they provide.

Staff Evaluation and Professional Development

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

The Teacher Support Team that will be responsible for maintaining teacher licensure requirements and professional development shall consist of designated mentors, principal and asst. principal. Each will assist teachers to grow as educators.

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

The school will mentor, retain and evaluate staff in accordance with NC General Statute 115C333, beginning teachers will be observed and evaluated using the NC Educator Evaluation System (NCEES) which includes the development of the Professional Development Plan (PDP). Before participating in the evaluation process every teacher must complete training on the evaluation process.

Each beginning teacher shall be assigned a mentor to assist their growth in the first three years of the Beginning Teacher Support Program. The mentors responsibilities and duties shall include:

- * Participating in the Beginning Teacher Orientation.
- * Conducting informal/formal observations of beginning teachers.
- * Meeting and/or communicating with beginning teachers on at a minimum a bimonthly schedule.
- * Providing feedback to beginning teachers from observations and formative assessment.
- * Assisting beginning teachers with developing lesson plans, classroom management, behavioral management, organization, positive communication with peers and parents, curriculum, and instruction.
- * Assisting beginning teachers with collecting and analyzing data to improve their instructional strategies.
- * Sharing information regarding professional development including opportunities for beginning teachers.
- * Assisting in the preparation and facilitating implementation of the PDP.
- * Serving as a resource and support for administrators regarding the beginning teacher process.
- * Providing documentation (contact logs, sign-in sheets, checklists, etc.) of mentor activities to the LEA.
- * Evaluating the Beginning Teacher Support Program to identify areas requiring improvement.

As the leader of the school, the principals shall help facilitate the development of beginning teachers. The principals responsibilities and duties shall include:

- * Ensuring that beginning teachers are provided orientation at the school.
- * Conducting informal/formal observations of beginning teachers.

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- * Meeting and conferencing with beginning teachers, offering feedback from observations and formative assessments.

- * Providing an environment conducive for the support of beginning teachers including limiting preparations, limiting the assignment of noninstructional duties, limiting the number of exceptional children and difficult students in beginning teachers classrooms, and making accommodations for conferences between mentors and beginning teachers.

- * Ensuring completion and providing assistance in the development of beginning teachers PDPs.

- * Continuously monitoring beginning teachers throughout the year and notifying the Director of Human Resources of any concerns with the performance of beginning teachers.

- * Evaluating the Beginning Teacher Support Program to identify areas requiring improvement.

The Teacher Support Program shall provide a number of required activities and additional tools to assess the performance of teachers and to facilitate the refinement of essential practices and skills. Additional support tools will include a beginning teacher website, notification of professional development opportunities, online training modules and additional instructional materials, which will also support teacher retention.

The Academy will document compliance of the Beginning Teacher Support Program through a number of means. Informal/formal observations, Professional Development Plans, Summative Evaluations and other documentation regarding the evaluation of beginning teachers pursuant to the NCEES will be maintained on the State maintained Home Base website. Participation in the Beginning Teacher Orientation and other professional development completed by teachers will be maintained in the Human Resource Management System HRMS and/or the certificate of completion professional development activities will be electronically maintained in the beginning teachers file in the Human Resources Department.

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.*

Each beginning teacher is required to develop an annual PDP to be based on the North Carolina Professional Teaching Standards, and must include goals, strategies, and assessment of the beginning teacher's progress in improving professional skills. The plan shall be completed within ten days of the beginning of the school year. The plan will be maintained on the State maintained Home Base website.

The Professional Development Plan is as follows:

Individual Growth Plan

Teachers who are rated at least "Proficient" on all the Standards on the Teacher Summary Rating Form shall develop a PDP designed to improve performance on specifically identified Standards and Elements.

Monitored Growth Plan

A teacher shall be placed on a Monitored Growth Plan whenever he/ she:

A. Is rated "Developing" on one or more Standards on the Teacher Summary Rating Form (TSRF); and

B. Is not recommended for dismissal, demotion, or nonrenewal.

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A Monitored Growth Plan shall identify the Standards and Elements to be improved, the goals to be accomplished and the activities the teacher should undertake to achieve Proficiency, and a timeline which allows the teacher one school year to achieve Proficiency. A Monitored Growth Plan that meets those criteria shall be deemed to satisfy the requirements of NCGS 115DC333(b).

Directed Growth Plan

A teacher shall be placed on a Directed Growth Plan whenever he/she:

- A. Is rated
 - a. "Not Demonstrated" on any Standard on the TSRF; or
 - b. "Developing" on any Standard on the TSRF for two sequential years; and
- B. Is not recommended for dismissal, demotion or nonrenewal.

The Directed Growth Plan shall identify the Standards and Elements to be improved, the goals to be accomplished, the activities the teacher shall complete to achieve Proficiency, a timeline for achieving Proficiency within one school year.

- 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.*

New Teacher Induction (NTI): The board acts as the monitor for this program, which is provided by the EMO. The NTI program shall consist of the following:

New Teacher Induction/Orientation

The Academy will be responsible for conducting a formal orientation to take place in the summer prior to school beginning. For those newly hired individuals who were not able to attend the summer induction, a winter session will be held. This induction will include information on staff development opportunities, mentoring services, curriculum and instruction resources, testing data, and policies and procedures. In compliance with HB 1032 this induction will also include information on working with special needs students.

Orientations shall include:

- * A tour of the Academy to familiarize teachers with the facility and faculty.
- * A copy (bound or electronic version) of the schools faculty hand book.
- * A copy (bound or electronic version) of the Beginning Teachers Handbook which shall include pertinent school policies and procedures, as well as CSUSAs vision and mission statement (the copy may be an electronic version).
- * Information regarding the available services and training opportunities for beginning teachers.
- * Information about the Beginning Teacher Support Program and a detailed review of licensure procedures, requirements and information regarding the conversion process from the initial (SP I) license to the continuing (S P II) license.
- * Training on the North Carolina Teacher Evaluation Process including expectations for the required performances of beginning teachers during the three year beginning teacher program.
- * Training on the NC Standard Course of Study and the Guaranteed and Viable Curriculum.
- * Information regarding the safe and appropriate use of seclusion and restraint of students.

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- * Information regarding the State's Ready Accountability Model.
- * Information regarding the State Board of Educations Mission and Goals.
- * Information regarding classroom management, lesson plan design, student accountability and the code of ethics.

Responsibilities for Beginning Teacher Support

Beginning Teacher Support, provided by the school leadership team and EMO, will deliver:

- * Orientations
- * Professional development
- * Personal and professional support, opportunities for new teachers to observe best practice in teaching and learning
- * Feedback on teachers work in light of student achievement data and school performance criteria.
- * Information on Instructional support, Professional support, Personal support, and Logistical support.

Principal Roles/Responsibilities for Beginning Teacher Support

The Principal will:

- * Convey to new teachers the school's philosophy of how students learn, the schools history, the special traditions and accomplishments, as well as the essence of the school improvement plan and how they will play a role in the implementation of that plan.
- * Clearly articulate to the staff that all have a responsibility for informal mentoring of new teachers.
- * Reduce as much as possible additional responsibilities of new teachers so they can focus on instruction, organization, and planning.
- * Interact with each new teacher face-to-face at least once a week the first semester.
- * Assign a mentor teacher to make sure new teachers are provided the essential information about the school and assure that all staff members make resources readily available.
- * Make sure front office staff and custodial staff explicitly offer assistance in obtaining and/or adjusting resources both at the beginning of school and throughout the year.
- * Engage staff in welcoming, supporting, and collaborating with new staff members.
- * Make sure each new teacher has a copy of the Common Core State Standards and/or Essential Standards, the Guaranteed and Viable Curriculum, and the School Improvement Plan.

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

The Academy will facilitate weekly professional development imbedded in grade-level common planning meetings, as well as, monthly professional development conducted during afternoon staff meetings. One meeting per month will be devoted to topics associated with Professional Standards.

(Sample) Beginning Teacher (BT) Professional Development Schedule

September

BT Orientation - Expectations and overview of program in addition to a licensing PD

FOCUS: Available services/training opportunities/teacher evaluations/technology/process for continuing licenses.

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October

Standard 1: Leadership - BT utilizes effective communication skills to establish quality professional and confidential relationships to impart knowledge of ethical standards, instructional best practices, and leadership opportunities.

FOCUS-Trusting Relationships and Coaching/Leadership/Communication and collaboration/Best Practices/Ethical Standards/Advocacy for BT and students.

November and December

Standard 2: Establish a respectful environment for a diverse population of students -

BT will develop a strong relationship with all learners, their parents or guardians, and the community through reflective practices on issues of equity and diversity.

FOCUS-Relationships with students, families, school, and community/Honor and Respect Diversity/Classroom environment that Optimize Learning/Re-teaching students of all learning needs.

January & February

Standard 3: Know the content they teach - Learn about the knowledge of the North Carolina BT will learn the Standard Course of Study (NCSCOS) and the 21st century goals to promote student achievement.

FOCUS- NCSCOS and 21st Century Goals/Content and curriculum

March

Standard 4: Facilitate learning for all students - BT will have an understanding and use of assessment tools to drive student achievement.

FOCUS: Instructional Practice/Professional Practice/Student Assessment

April and May

Standard 5: Reflection - BT will continually work on self-growth, not limited to observation skills to improve your effectiveness.

FOCUS: Allocation of Use of Time/ Reflective Practices/Data Collection

All participant are required to have a journal for note taking and reflection.

Enrollment and Marketing:

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

Marketing Plan

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

Primary Target Demographics:

*Families with children ages 5 14 residing in Wendell, Knightdale, Zebulon and Rolesville

Marketing Strategy:

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The communication strategy will include an integrated marketing approach; which may include direct mail, television, print, online, social media, community outreach and events. Each medium will be evaluated based on its reach (how many potential targets will see or use this medium) and frequency (how often potential targets will see/read/hear our message), as well as its likelihood to drive traffic.

*Television A television campaign will be run on cable and/or broadcast television. Cable television provides a more targeted reach with a very high frequency. Broadcast provides a very large reach, but low frequency. We will consider WRAL and Time Warner Cable network.

*Print Back-to-school sections and age-appropriate advertising sections will be considered. Newspapers that will be considered include: News & Observer, Eastern Wake News, and The Total Connection as well as parenting magazines.

*Online/Email marketing Limited online advertising campaigns will be utilized that reach our target demographic. Targeted email blasts and campaigns that piggy-back on community Web sites/events will be utilized whenever possible. Online advertising will primarily include Facebook/Google/Adwords focused on geographic and psychographic data and targeted searches. The online ad will direct the potential parent/guardian to the school website at www.KnightdaleCharter.org.

*Social media paid advertising on social media outlets will be utilized to reach our demographic and geographic targets. Facebook and Twitter will be utilized.

*Community outreach and events Community Information Sessions will be offered. The school will align with community partners such as the Knightdale Chamber of Commerce, Rolesville Chamber of Commerce and Wendall Chambers of Commerce as well as area rotary clubs and other civic organizations. The school will work with area civic/community centers, such as the East Regional Public Library in Knightdale, and the Wendell Community Library to post information and hold community outreach events. Flyer distributions to local pre-schools, day care centers and churches including: Widewaters Learning Center, Knightdale KinderCare, Grow N Learn, Cathy Lee Child Development, Kids Educational Center and Growing Child Childcare.

Implementation

Sept. 2014 Jan. 2015

- *Update Web site.
- *Participate in Community Events.
- *Join community organizations.
- *Build relationships with local media.

Jan. 2015 June 2015

- *Research and tentatively secure paid advertising media.
- *Plan Community Information Sessions.

July 2015 Jan. 2016

- *Prepare all advertisements; brochures/flyers; direct mail pieces; press releases
- *Update Web site with school information, building process photos, application process, enrollment policy, lottery process, Community Information Session dates, venues and times.
- *Host Community Information Sessions.
- *Send out first of a series of direct mail pieces introducing the school.

Feb. 2016 - March 2016

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*Community info sessions

*Open local enrollment office - distribute promotional materials.

*Set advertising campaign to run through the end of open enrollment.

*Distribute direct mail pieces encouraging applications one per month for three months; evaluate application generation at the end of campaign and decide if additional mailings are necessary.

*Evaluate results on a monthly basis to determine if advertisements are working.

March 2016 - Aug. 2016

*Schedule lottery

*Continue advertising and distribute additional two direct mail pieces mailed monthly.

*Attend events at community centers, library and YMCA.

*Develop sponsorship opportunities and attend school expos.

Sept. 2016 - Dec. 2016

*Ribbon-cutting event.

Jan. 2017 - March 2017

*Continue advertising and direct mail based on need/number of seats available.

*Parent Information Sessions.

*School Tours.

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.*

Once we receive preliminary approval status, we will continue to communicate to interested parents through community events sponsored by the Chamber of Commerce, Parks and Recreation events, information sessions, the schools website www.knightdalecharter.org and Facebook pages and local public media. We will begin our marketing campaign which begins with a direct mailer to parents inviting them to attend parent information sessions. These parent information sessions will include information about Cardinal Charter Academy at Knightdales mission, the education model, enrollment and lottery process and how families can become involved in the school through the Parent Teacher Committee. Several parent information sessions will be held in order to reach as many parents as possible throughout the community. The recruitment, education and involvement of local parents and community members are integral to the success of the Academy.

We will continue to engage parents after the enrollment lottery is held and throughout the year, starting with a "Meet and Greet" with the Principal. During this event, parents will also have an opportunity to ask questions, sign up for car pool, meet with the uniform vendor, drop off registration documents, and meet the support staff. A temporary office will be in place where parents can communicate with the school administration, drop off registration documents, volunteer to assist with various start-up projects and plan PTC events throughout the summer. These opportunities will all be

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for the engagement of parents and the strengthening of the overall school community.

The CSUSA education model we plan to follow includes a comprehensive parental involvement program and family-school-community partnership model. Parental involvement includes attending school functions; attending conferences; helping children improve their school work through encouragement, providing study time and place, model behavior, and tutoring; serving as advocates for their children and the school; volunteering in the school and community; and assuming an active decision-making role in their child's education (Maynard 1997).

Our school will utilize the framework of Joyce Epstein, whose model includes six types of cooperation between families, schools, and other community organizations: 1. Parenting; 2. Communicating; 3. Volunteering; 4. Learning at home; 5. Collaborating with the community; and, 6. Decision-making (Epstein, 1995; Epstein, 1997). The framework of six types of involvement helps educators develop more comprehensive programs of school-family-community partnerships. Although the Academy will use the framework of six types of involvement as a guide, the board, parents, and Academy staff will choose practices that will help achieve important goals and meet the needs of students and families.

Parent participation is integral to the success of the Academy and will continue to be solicited for the development of Academy goals and objectives. All parents are asked to commit to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents shall be strongly encouraged to volunteer a total of thirty (30) hours per school year. Parents can track their volunteer hours via the student information system. To ensure that all parents and stakeholders understand the unique programming of the CSUSA model, parents and students are given thorough explanations of the curriculum, expectations, and requirements of the Academy prior to enrollment. This information is delivered through a variety of ways: open houses, published information, brochures, online applications and, website question/answer modules. After enrollment and the start of school, parents continue to have flexibility to monitor their child's progress online and/or through parent conferences. Because the Academy follows a continuous improvement model, parents will have real time access to their child's progress.

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.*

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For the first year, Open Enrollment will (tentatively) begin February 17th and close on March 31st. In subsequent years, Open Enrollment will open on January 1st and close on February 28th.

The process and policies for Open Enrollment and the lottery are outlined below.

*Applications are primarily collected via the student information system (SIS). Paper applications will also be accepted and then manually entered into SIS.

*Applications submitted within Open Enrollment will be processed in the lottery, if a lottery is needed.

*At the close of Open Enrollment, the Academy will determine if a lottery is needed at any grade level. A lottery will be completed if there are more applications (received within Open Enrollment) than seats available in any grade level.

*If needed, a public lottery will be held two weeks after the Open Enrollment period ends.

*The Academy will verify preferences and number of seats available prior to the public lottery.

*The Academy will prepare lottery ID cards which will include lottery ID, applicant name, grade level and sibling indication.

*The Academy will also give enrollment preference to the applicant children of board members and full-time school employees. The number of students receiving this preference may not exceed 15% of the schools enrollment.

*After the schools first year, the Academy will extend sibling preferences to eligible applicants. (Please see the Enrollment Policy in Appendix U which addresses multi-birth sibling preferences).

*Parents will receive lottery ID letters approximately one week prior to the public lottery.

*Parents will be able to use the issued ID to identify their child at the public lottery and/or in the posted results.

Applicants selected to receive an open seat will receive an offer. An applicant whose name is drawn after all open seats are filled will be placed on the waitlist. If a card denoting siblings is pulled, each child will be placed in the next available slot in their grade level. As seats become available, the Academy will offer the open seat to the next child on the waitlist. The school will exhaust the waitlist prior to moving to the list of applicants who applied after the close of Open Enrollment. Applications received after the close of Open Enrollment are ordered on the waitlist according to the date/time received.

If a family wishes to withdraw from the Academy, they will need to complete a withdrawal form at the school. Once the school receives a records request from the child's new school, the school will send the records as requested. Upon withdrawal, the school will then offer the open seat to the next child on the waitlist.

Parents may withdraw or transfer students at any time and records will be forwarded.

If a family leaves the school and wishes to re-enroll at the school, the family must submit a new application, be placed on the waiting list, and then wait until a seat becomes available for their child. A student who was enrolled in the charter school within the two previous school years but left the school (i) to participate in an academic study abroad program or a

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competitive admission residential program or (ii) because of the vocational opportunities of the student's parent may re-enroll without submitting a new application or being placed on the waitlist.

There are no mandatory pre-admission activities. The following events are optional:

- o Open House allows parents and their children to become acquainted with their child's classroom and teacher(s).

- o Orientation typically taking place right before the start of school, this event is primarily a medium through which the school communicates operational practices and procedures to families.

- o Family Information Session this event is for interested families who want to learn more about the school.

- o School Tour the purpose of this event is to show the school building to families, and field any questions families may have.

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PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Wake County Schools
 LEA #2 Johnston County Schools
 LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 920	LEA 510	LEA 000	LEA 920	LEA 510	LEA 000	LEA 920	LEA 510	LEA 000	LEA 920	LEA 510	LEA 000	LEA 920	LEA 510	LEA 000
Kindergarten	118	2	0	118	2	0	117	3	0	117	3	0	117	3	0
Grade 01	90	2	0	113	2	0	113	2	0	113	2	0	112	3	0
Grade 02	90	2	0	90	2	0	113	2	0	113	2	0	113	2	0
Grade 03	67	2	0	90	2	0	90	2	0	113	2	0	113	2	0
Grade 04	68	1	0	90	2	0	90	2	0	90	2	0	113	2	0
Grade 05	68	1	0	90	2	0	90	2	0	90	2	0	113	2	0
Grade 06	147	3	0	147	3	0	147	3	0	147	3	0	147	3	0
Grade 07	0	0	0	147	3	0	147	3	0	147	3	0	147	3	0
Grade 08	0	0	0	0	0	0	147	3	0	147	3	0	147	3	0
	648	13		885	18		1054	22		1077	22		1122	23	

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

Transportation Plan:

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

The board recognizes that transportation cannot be a barrier to any child attending the Academy. Therefore, school administration and CSUSA will assist parents with the identification and coordination of transportation options to ensure that transportation to the Academy is available to all students. This will include facilitating car pools and informing parents as early as Open House of their transportation options. If car pool options are exhausted, school administration will meet with the parent and make every effort to assist them in locating a means of transportation whether it is via bus, taxi or private transportation service.

The Academy, along with CSUSA, shall disseminate a transportation plan through publicized information sessions, during open houses, and through the main school office. All parents will be provided with a link to an electronic survey through which they are able to express their interest in ride sharing and gain access to a pool of parents residing within the same region.

Car pool and drop-off/pick-up procedures will be in place to ensure that all children can get to and from school. A parent orientation session will be held prior to the beginning of the school year whereupon the administration communicates the procedures outlined for drop-off/pick-up procedures and additional processes to connect across the school community for ride sharing. All transportation related information will be provided to parents via SIS communication as well as in the Live Binder of Frequently Asked Questions which will be published online for all applicants and enrollees

Our budget includes annual funding (see below) to support possible transportation needs where ridesharing may not be achievable. These funds also will support the cost of transportation for students who may be experiencing homelessness or exceptional children with transportation needs noted in their IEPs. These funds are included as a conservative measure and shall be used to provide transportation to those students requiring such transportation by applicable law.

Year 1: \$54,000
Year 2: \$55,080
Year 3: \$56,182
Year 4: \$57,305
Year 5: \$58,451

School Lunch Plan:

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

The facility plan will include a multipurpose room which will mainly be used

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as a spacious cafeteria. All students will eat meals in the cafeteria. The Academy will contract with a national food service vendor to provide breakfast and lunch. The food vendor will provide a quality unitized meal program that includes all the "components" of a full service operation. The "component meal system" should consist of: individually packaged entrees; side dishes; fresh fruits; vegetables; fresh bread; milk; condiments; plastic wear; trays and liners. Prior to the beginning of the school year, the selected food vendor and board will send training personnel to the Academy to train the food service staff on how to properly run the food service program, including: ordering, inventory, food prep, serving procedures, and clean up. The serving lines are set up with the point of service station at the end. This set up ensures the cafeteria personnel can ensure the students are receiving all of the required components to make up a reimbursable meal. The Academy will utilize a computerized point of sale system that will track meals and provide a reporting function for accountability and claiming. All students are assigned a unique account number at the beginning of the school year and can add funds to their account in the cafeteria office and online. Regardless of account balance, no child is ever denied a meal. In addition, the board should be eligible to participate in the NSLP. The board will complete all necessary applications in advance of the school year. If, for any reason, the Academy's application for participation in this program is not accepted, the Academy will amend its operating budget to reflect the reduction in revenues associated with reimbursement from the NSLP. At the end of each month the cafeteria staff will be responsible for sending the monthly historical edit to the NSLP Director which will be used in the submission of the reimbursement claim.

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		\$3,000.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$1,120.00
Property Insurance	\$11,440,108		\$30,600.00
Motor Vehicle Liability	\$1,000,000		\$200.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$300.00
Other	\$2,118,162		\$24,000.00
Total Cost			\$59,220.00

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rooms for enrichment programs, common areas for gathering (lunch, assemblies, etc.), and space for school administration. The school site plan will also include appropriate outdoor recreational areas, designated pick-up and drop-off zones, and parking for staff and guests.

CSUSA has assisted boards with opening charter schools ranging in size from +/-45,000 to 155,000 square feet. CSUSA will work with us to design a superior learning environment to achieve thematic and specialty programs inclusive of school technology, academic communities, and arts and sciences. A third party developer will build and deliver a facility that reflects our plans and design. CSUSA works with and has access to a variety of architectural firms experienced in building schools that provide a safe learning environment and operate efficiently and effectively. The process is accomplished by a team of experts, whose disciplines include: education, licensed general contracting, and project management.

Refer to Appendix U, Action Plan, for a schedule of the key milestones for the development of the school. Detailed project plans will be implemented for each phase of the project. All construction and renovation projects undertaken prior to the opening of the school or during the term of the charter will be carried out by experienced and appropriately licensed and insured construction professionals who will perform all work in accordance with the construction specifications, drawings and other documents, as directed by the design professional.

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

Budgeted Yr1 Rent: \$956,806

SqFt: 68,700 (\$13.93/sq.ft)

Lease rates are derived in consideration of acreage, location and design. The board will review all options and approve a package that is competitive and encompasses the needs of the school.

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 unfortunate event that an adequate permanent school facility cannot be secured, the board and CSUSA will work diligently to secure an appropriate alternative short term facility, as part of its our facility contingency plan. The temporary facility would fully meet the programmatic and educational needs of students and staff.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
The transportation plan is not thorough. A clear plan and related budget should be established. Further, \$54,000 is not a sufficient amount to set aside for transportation costs.	Greg Schermbeck	Transportati
What is the contingency plan to ensure students who would normally qualify for free and reduced lunch receive a full meal daily if the school's application for participation in the NSLP is not accepted?	Kebbler Williams	School Lunch
The total cost of insurance is \$59,220, which is less than the budget line item (\$74,660	Kebbler Williams	Civil Liabil

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for the first year). Why is there a discrepancy?		
The contingency plan does not include enough detail about the method of finding an alternative temporary location.	Kebbler Williams	Facility and
A realistic plan is outlined however more information should be provided regarding the potential lots and development opportunities in the proposed neighborhoods. Appendix Q and R are not attached. More specific contingency plans are required.	Greg Schermbeck	Facility and
nothing concrete how did they arrive at rent? no real contingency	Amy Ruck Kagan	Facility and

Reviewer	Score
Cheryl Turner	
Joe Maimone	
Amy Ruck Kagan	Pass
Leigh MObley	
Becky Taylor	
Eric Sanchez	
Kebbler Williams	Pass
Helen Nance	
Mike McLaughlin	
Alex Quigley	
Sherry Reeves	
Tammi Sutton	
Greg Schermbeck	Pass
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Phyllis Gibbs	

VI. FINANCIAL PLAN

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

Budget: Revenue Projections from each LEA 2016-17

<p>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p>State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.</p> <ul style="list-style-type: none"> In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located. <p>Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p>Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</p>																							
	<p>LEA #1920 - Wake County Schools</p>																							
	<table border="1"> <thead> <tr> <th>Revenue</th> <th>2014-2015 Per Pupil Funding</th> <th>Projected LEA ADM</th> <th>Approximate funding for 2016-2017</th> </tr> </thead> <tbody> <tr> <td>State Funds</td> <td>\$4,501.95</td> <td>648</td> <td>\$2,917,263.60</td> </tr> <tr> <td>Local Funds</td> <td>\$2,048.00</td> <td>648</td> <td>\$1,327,104.00</td> </tr> <tr> <td>Federal EC Funds</td> <td>\$3,768.11</td> <td>93</td> <td>\$350,434.23</td> </tr> <tr> <td>Totals</td> <td></td> <td></td> <td>\$4,594,801.83</td> </tr> </tbody> </table>	Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017	State Funds	\$4,501.95	648	\$2,917,263.60	Local Funds	\$2,048.00	648	\$1,327,104.00	Federal EC Funds	\$3,768.11	93	\$350,434.23	Totals			\$4,594,801.83			
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	State Funds	\$4,501.95	648	\$2,917,263.60																				
	Local Funds	\$2,048.00	648	\$1,327,104.00																				
	Federal EC Funds	\$3,768.11	93	\$350,434.23																				
	Totals			\$4,594,801.83																				
	<p>LEA #2510 - Johnston County Schools</p>																							
	<table border="1"> <thead> <tr> <th>Revenue</th> <th>2014-2015 Per Pupil Funding</th> <th>Projected LEA ADM</th> <th>Approximate funding for 2016-2017</th> </tr> </thead> <tbody> <tr> <td>State Funds</td> <td>\$4,750.57</td> <td>13</td> <td>\$61,757.41</td> </tr> <tr> <td>Local Funds</td> <td>\$1,495.00</td> <td>13</td> <td>\$19,435.00</td> </tr> <tr> <td>Federal EC Funds</td> <td>\$3,394.88</td> <td>2</td> <td>\$6,789.76</td> </tr> <tr> <td>Totals</td> <td></td> <td></td> <td>\$87,982.17</td> </tr> </tbody> </table>	Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017	State Funds	\$4,750.57	13	\$61,757.41	Local Funds	\$1,495.00	13	\$19,435.00	Federal EC Funds	\$3,394.88	2	\$6,789.76	Totals			\$87,982.17			
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Total Budget: Revenue Projections 2016-17 through 2020-2021

INCOME: REVENUE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
-State ADM Funds	\$2,979,021	\$4,151,131	\$5,043,551	\$5,250,299	\$5,573,287
-Local Per Pupil Funds	\$1,346,539	\$1,876,177	\$2,279,140	\$2,372,900	\$2,518,819
-Exceptional Children Federal Funds	\$357,224	\$364,368	\$371,513	\$378,658	\$385,802
-Other Funds*	\$1,123,902	\$244,314	\$296,943	\$309,356	\$328,751
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$5,806,686	\$6,635,990	\$7,991,147	\$8,311,213	\$8,806,659

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

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

Cardinal Charter Academy at Knightdale - CCAs mission is to build a student-centered, data-driven learning environment where students develop critical thinking skills and can reach their academic potential by utilizing a technology rich methodology tailored to meet their needs.

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary									
Administrative & Support Personnel:															
Lead Administrator	1	\$90,000	\$90,000	1	\$91,800	\$91,800	1	\$93,636	\$93,636	1	\$95,509	\$95,509	1	\$97,419	\$97,419
Assistant Administrator	1	\$65,000	\$65,000	2	\$61,200	\$122,400	2	\$62,424	\$124,848	2	\$63,672	\$127,344	2	\$64,946	\$129,892
Finance Officer	1	\$40,000	\$40,000	1	\$40,800	\$40,800	2	\$41,616	\$83,232	2	\$42,448	\$84,896	2	\$43,297	\$86,594
Clerical	5	\$24,752	\$123,760	6	\$23,841	\$143,046	7	\$26,789	\$187,523	7	\$27,325	\$191,275	7	\$27,871	\$195,097
Food Service Staff	3	\$10,880	\$32,640	3	\$11,098	\$33,294	4	\$10,362	\$41,448	4	\$10,570	\$42,280	4	\$10,781	\$43,124
Custodians	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
A - Total Admin and Support:	11		\$351,400	13		\$431,340	16		\$530,687	16		\$541,304	16		\$552,126
Instructional Personnel:															
Core Content Teacher(s)	29	\$41,000	\$1,189,000	40	\$41,820	\$1,672,800	47	\$42,656	\$2,004,832	48	\$43,510	\$2,088,480	50	\$44,380	\$2,219,000
Electives/Specialty Teacher(s)	10	\$41,000	\$410,000	15	\$41,820	\$627,300	15	\$42,656	\$639,840	15	\$43,510	\$652,650	15	\$44,380	\$665,700
Exceptional Children Teacher(s)	3	\$41,000	\$123,000	4	\$41,820	\$167,280	5	\$42,656	\$213,280	5	\$43,510	\$217,550	5	\$44,380	\$221,900
Instructional Support	46	\$3,065	\$140,990	64	\$4,311	\$275,904	72	\$4,416	\$317,952	73	\$4,467	\$326,091	75	\$4,509	\$338,175
Teacher Assistants	2	\$19,000	\$38,000	2	\$19,380	\$38,760	2	\$19,768	\$39,536	2	\$20,163	\$40,326	2	\$20,566	\$41,132
B - Total Instructional	90		\$1,900,990	125		\$2,782,044	141		\$3,215,440	143		\$3,325,097	147		\$3,485,907

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Personnel:														
A+B = C - Total Admin, Support and Instructional Personnel:	101		\$2,252,390	138		\$3,213,384	157		\$3,746,127	159		\$3,866,401	163	\$4,038,033
Administrative & Support Benefits														
Health Insurance	15	\$1,733	\$25,995	18	\$1,768	\$31,824	21	\$1,803	\$37,863	21	\$1,839	\$38,619	21	\$39,396
Taxes & Workers Compensation	15	\$2,403	\$36,045	18	\$2,453	\$44,154	21	\$2,544	\$53,424	21	\$2,595	\$54,495	21	\$55,587
D - Total Admin and Support Benefits:	30		\$62,040	36		\$75,978	42		\$91,287	42		\$93,114	42	\$94,983
Instructional Personnel Benefits:														
Health Insurance	44	\$2,600	\$114,400	61	\$2,652	\$161,772	69	\$2,705	\$186,645	70	\$2,759	\$193,130	72	\$202,608
Taxes & Workers Compensation	44	\$3,911	\$172,084	61	\$4,144	\$252,784	69	\$4,242	\$292,698	70	\$4,325	\$302,750	72	\$317,520
E - Total Instructional Personnel Benefits:	88		\$286,484	122		\$414,556	138		\$479,343	140		\$495,880	144	\$520,128
D+E = F - Total Personnel Benefits	118		\$348,524	158		\$490,534	180		\$570,630	182		\$588,994	186	\$615,111
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	41		\$413,440	49		\$507,318	58		\$621,974	58		\$634,418	58	\$647,109
B+E = H - Total Instructional Personnel (Salary & Benefits)	178		\$2,187,474	247		\$3,196,600	279		\$3,694,783	283		\$3,820,977	291	\$4,006,035
G+H = J - TOTAL PERSONNEL	219		\$2,600,914	296		\$3,703,918	337		\$4,316,757	341		\$4,455,395	349	\$4,653,144

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

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
	Administrative & Support:					
Office:	Office Supplies	\$22,993	\$23,749	\$24,440	\$24,958	\$25,517
	Paper	\$5,000	\$5,100	\$5,202	\$5,306	\$5,412
	Computers & Software	\$57,676	\$8,500	\$18,275	\$13,175	\$18,275
	Communications & Telephone	\$40,000	\$40,800	\$41,616	\$42,448	\$43,297
	Copier leases	\$20,000	\$20,400	\$20,808	\$21,224	\$21,649
Management Company	Contract Fees	\$0	\$132,720	\$319,646	\$498,673	\$616,466
Professional Contract	Legal Counsel	\$25,000	\$5,000	\$5,100	\$5,202	\$5,306
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$8,500	\$23,670	\$24,143	\$24,626	\$25,119
	Other Professional	\$6,000	\$6,120	\$6,242	\$6,367	\$6,495
Facilities	Facility Lease/Mortgage	\$956,806	\$1,223,487	\$1,426,761	\$1,474,771	\$1,549,088
	Maintenance	\$75,957	\$97,731	\$118,540	\$123,380	\$130,925
	Custodial Supplies	\$25,610	\$26,122	\$26,645	\$27,178	\$27,721
	Custodial Contract	\$88,838	\$123,790	\$150,399	\$156,568	\$166,199
	Insurance (pg19)	\$74,660	\$84,793	\$92,788	\$95,498	\$99,151
	Other	\$348,100	\$144,624	\$80,748	\$30,773	\$30,299
Utilities	Electric	\$116,790	\$119,126	\$121,508	\$123,938	\$126,417
	Gas	\$0	\$0	\$0	\$0	\$0
	Water/Sewer	\$13,740	\$14,015	\$14,295	\$14,581	\$14,873
	Trash	\$37,785	\$38,541	\$39,312	\$40,098	\$40,900
Transportation	Buses	\$54,000	\$55,080	\$56,182	\$57,305	\$58,451
Other	Marketing	\$82,625	\$30,855	\$22,058	\$2,933	\$5,865
	Child nutrition	\$69,277	\$95,636	\$115,759	\$120,544	\$127,993
	Travel	\$12,000	\$12,240	\$12,485	\$12,734	\$12,989
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$2,141,357	\$2,332,099	\$2,742,952	\$2,922,280	\$3,158,407
	Instructional:					
Classroom Technology	Computers	\$0	\$0	\$0	\$0	\$0
	Software	\$0	\$0	\$0	\$0	\$0
	Instructional Technology	\$597,334	\$179,660	\$294,308	\$211,544	\$271,678
	Other	\$0	\$0	\$0	\$0	\$0

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Instructional Contract	Instructional Support	\$0	\$0	\$0	\$0	\$0
	Staff Development	\$15,000	\$15,300	\$15,606	\$15,918	\$16,236
	Contracted Special Education	\$67,200	\$92,820	\$112,883	\$117,370	\$125,021
Books and Supplies	Instructional Materials	\$268,875	\$180,542	\$184,391	\$243,127	\$250,672
	Curriculum/Texts	\$2,000	\$2,040	\$2,081	\$2,122	\$2,165
	Copy Paper	\$0	\$0	\$0	\$0	\$0
	Testing Supplies	\$9,915	\$13,816	\$16,792	\$17,494	\$18,591
	Other	\$8,000	\$8,160	\$8,323	\$8,490	\$8,659
	L - TOTAL Instructional Operations	\$968,324	\$492,338	\$634,384	\$616,065	\$693,022
	K+L = M - TOTAL OPERATIONS	\$3,109,681	\$2,824,437	\$3,377,336	\$3,538,345	\$3,851,429

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$2,600,914	\$3,703,918	\$4,316,757	\$4,455,395	\$4,653,144
M - TOTAL OPERATIONS	\$3,109,681	\$2,824,437	\$3,377,336	\$3,538,345	\$3,851,429
J+ M =N TOTAL EXPENDITURES	\$5,710,595	\$6,528,355	\$7,694,093	\$7,993,740	\$8,504,573
Z - TOTAL REVENUE	\$5,806,686	\$6,635,990	\$7,991,147	\$8,311,213	\$8,806,659
Z - N = SURPLUS / (DEFICIT)	\$96,091	\$107,635	\$297,054	\$317,473	\$302,086

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.

We determined our schools total enrollment after considering various school models developed by our EMO, CSUSA. CSUSAs 17 years of management experience have allowed it to create specific school sizes for each model, which have been developed to ensure that each grade level has a consistent size to allow students to matriculate over time, and that there are an appropriate number of classes per grade level to allow optimal staffing of teachers, particularly in elective courses (music, art, PE, etc.) and middle school. The school model/size that we chose for Cardinal Charter Academy was determined after a thorough population analysis showed adequate demand in our area.

The results of that analysis drove our decision on the school model. We found that in order to fully enroll our school, a facility of 1,145 students would only have to attract 17.2% of the children aged 5-14 (i.e. ages in grades K-8) within a 15-minute drive time of the target area. Although somewhat high, this exact facility model continues to meet its enrollment goals in three other schools already (Cabarrus County, Iredell County, and across town in Cary). Our open-enrollment model will allow us to accommodate families beyond that traditional 15-minute drive time measurement (in places like Wendell and Zebulon), so this rate will actually be much lower. Eleven charter schools across the state already have enrollments exceeding 1,100 students in 2013-14, so the facility size is not uncommon. Moreover, as we stated in Section II, we will see more demand than the base population analysis suggests due to interest from parents seeking alternatives to poorly performing schools in eastern Wake County, as well as the overcrowding that is becoming an issue as a result of rapid growth along the Highway 64 corridor.

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

In the event that the anticipated revenues are lower than expected, a budget realignment of expenditures to revised revenue stream would be in order. Measures would include re-evaluation of staffing needs or postponement of hiring; reduction in enrollment driven expenses such as textbooks,

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consumables, fees and subscriptions, food service, technology and equipment needs, etc. Additionally, other previously non-contemplated sources of revenue, such as grants and contributions would be exercised. In addition, CSUSA, as set forth in our Management Agreement, will stand behind the Academy and carry its operating costs without assigning future liability to the Academy or the board, in the event this is necessary to achieve a balanced budget.

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

The operational budget is primarily based on the projected state, county, and federal funds and does not rely on other sources of funds to operate the school. However, the budget does include revenues and expenditures from both before & after care and food service, but these are voluntary programs whose revenues and expenditures adjust together based on participation thus they do not have any material impact to the operational budget. In addition, the budget does assume the school will obtain short-term financing to cover the year 1 initial purchases of capital equipment (technology and furniture) to outfit the school of (\$948,570). The repayment of these purchases is included in the budgets provided in this application. The ability to secure this financing is a benefit of our relationship with Charter Schools USA who has secured financing from various sources in order to complete the equipping of charter school facilities it opens and operates. Sources of financing have included: i) issuance of taxable and tax-exempt bonds to finance the acquisition of educational facilities and associated equipment, to-date, Charter Schools USA has participated in the issuance of approximately \$500 million of taxable and tax-exempt bonds ; ii) use of an available revolving line of credit facility; iii) commercial bank financing in some cases backstopped by a guarantee from either the management company or its affiliated development company ; iv) financing provided by either the management company or the development company and v) financing provided by a construction partner. Appendix R provides the assurance that CSUSA will provide the necessary financial support to the school to ensure its ability to operate.

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

The budget is based upon an average ratio of 18:1.

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.*

Yes. General provisions for purchasing requisitions depend upon the magnitude of the purchase. For purchases between \$1,000 to \$4,999, two written quotes are to be obtained and submitted along with purchase requisition. For purchases over \$5,000, three written quotes are to be submitted.

Financial audits are conducted annually by an independent certified public accountant. The Governing Board determines the auditing firm. The Governing Board may also select an audit committee to oversee the audit.

Budget also contemplates ongoing contracted special education services such as speech therapy and psychotherapeutic services. These contracts depend

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upon the needs of the specific school.

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

The budget reflects a financial commitment to ensuring that students receive a high-quality education that advances their academic and social development. In year 1, the budget assumes \$968,324 for Instructional Operations. Thereafter, the budget assumes an average annual expenditure of nearly \$600,000 per year for Instructional Operations. Instructional technology, specifically, represents 62% of the year 1 instructional budget. Integration of technology will allow students to have targeted access to curricular resources, assessment, technology based intervention and enrichment enhancing differentiation. Teachers will be trained to integrate technology carefully and strategically into the student-learning environment to increase academic achievement for each student.

Regarding transportation, we recognize that transportation can inhibit the schools enrollment objectives. Therefore, the budget does contain an average of \$54,000 per year to accommodate potential transportation needs.

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.*

Our operational goal is to achieve a minimum cumulative fund balance of 17% of operating expenses by year of stabilized enrollment. This will be achieved by developing and administering a comprehensive and balanced budget on an annual basis. Budget shall include all forms of revenue and all expenditures, including (i) Total Revenues; (ii) Operating Expenses; (iii) Reserve Expenses, (iv) Audit Expenses and (v) Fund Balance. Amendments to the budget will require the approval of the Governing Board. The budget will be prepared conservatively and with viability and sustainability of the School in mind. Maintaining alignment of all of these budgetary components is how the fund balance will be developed in accordance with school objectives.

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

The board will not finance the construction or purchase of the facility. The board will lease the facility and will not own the facility. Rent is projected to be 15% of revenue. The only debt financing in the proposed budget is for the purchase of school technology infrastructure, hardware, software, furniture and equipment. The proposed budget includes a five year conventional loan for \$948,570.00 at a projected interest rate of 7.5%. This loan is assumed to be commercial bank financing and, in some cases, may be backed by a guarantee from either CSUSA or a third party developer. If necessary, the board will request CSUSA's assistance in locating a third party developer, as CSUSA has worked with many.

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*

Other than the sources identified herein, the school does not anticipate obtaining assets from any 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?

We will contract with CSUSA to provide financial management services. CSUSA has well-established processes and procedures to ensure fiscal responsibility and sound internal controls. We will approve a financial policy manual, which will include, at a minimum: establishment of a modified accrual accounting system, a chart of accounts that aligns with NC DPIs system, internal controls that establish segregation of duties and authorization and processing of disbursements, establishment of a payroll system, and process for meeting the NC DPI data reporting requirements.

To ensure proper internal controls, policies will be adopted which include General Governmental Accounting Policies, Financial Reporting, Budgeting, Cash Receipts and Deposits, Purchasing and Cash Disbursements, Capital Assets and Payroll.

Adherence to the budget will be enforced and monitored monthly via review protocols. CSUSA will provide financial statements to school leadership and the board on a monthly basis which will allow readers to review budget vs. actual results. Review meetings will also be held between the EMO and school leadership on a consistent basis to discuss any budget variances.

The Cash Receipts/Deposits and Purchasing/Cash Disbursements policies both address segregation of duties. Some examples of controls in these areas are ensuring that staff handling deposits or disbursements are also not entering journal entries or preparing financial statements; staff setting up new vendors are not permitted to process disbursements; and POs are required for any purchases over \$300 and must be approved by the EMO and school. At the school administration level, cash receipt deposits will be made when the total of funds to be deposited reaches \$500. Deposits are to be made at least twice weekly, even if the total of funds to deposit has not reached \$500.

To further ensure safeguarding of cash, the school will have Positive Pay on all bank accounts. This fraud deterrent matches the checks the school issues with what was presented for payment.

As asset purchases are completed, detail lists are maintained by the EMOs Operations team and Finance Department for adherence with the Capital Assets policy.

Payroll and Human Resources internal controls procedures include hiring and advancing personnel, recording and maintaining accurate records, preparing payroll, paying employees and payroll taxes to taxing authorities, as well as payments to other parties for benefits. To ensure proper control and reduce the risk of fraud, these duties are segregated among the following departments: human resources, payroll, treasury, and accounting. Payroll Department-finalizes the amounts to be paid to employees based on information provided by timekeeping software. Treasury Department-reviews and approves amounts to be funded from the operating bank account to the payroll bank account. Accounting Department-confirms that all payroll transactions are properly recorded and reported on financial statements. The maintenance of a separate bank account for payroll further reduces the amount of company assets at risk.

Financial records are maintained at the Academy and CSUSA. All transactions will be recorded in ISIS. Internal controls are also maintained through standardized reporting formats, password and processing controls and other

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application controls that are included in the accounting software. Financial reports will be audited on an annual basis by an independent auditing firm selected by us and approved by Local Government Commission. We will provide the information of the auditor as required by the NC DPI. The annual audit will be completed and filed with the GCC and NC DPI by October 31 following the completed fiscal year ending June of the same year.

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

There are no related party transactions.

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

Knightdale Auditor
PETWAY MILLS & PEARSON, PA
806 North Arendell Avenue,
Zebulon, NC 27597

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
Additional information should be gathered regarding if reaching 600+ students in its opening year is feasible.	Greg Schermbeck	Budget Reven
big reliance on other funds	Amy Ruck Kagan	Total Budget
Appropriate information is provided. Again, the school should present enough information to ensure the projected enrollment is met.	Greg Schermbeck	Total Budget
\$0 is set aside for custodians. This should be investigated.	Greg Schermbeck	Personnel Bu
(1) What are the 46 instructional support positions (that increase to 64, 72, 73, and 75 in subsequent years)? (2) If the school administrators and other such staff are sole employees of the EMO, why are their salaries a part of the personnel budget for the school, rather than part of the EMO's budget?	Kebbler Williams	Personnel Bu
The following should be questioned: \$348,100 - Other facility funds - This seems like a large amount of funds without being specifically earmarked. \$0 - Computer & Software - Some funds should be set aside for computers and software. \$597,334 - Instructional Technology - Information should be provided regarding how these funds will be utilized. \$2,000 - Texts - Low amount of funds for textbooks. \$0 - Copy Paper - The school will need paper for daily class materials, exit tickets, and homework. Troubling that \$0 is earmarked for copy paper.	Greg Schermbeck	Operations B
high numbers comparatively high computer cost in year one high comms and telephone why the range in legal fees and financial fees what is other professional major decrease in marketing	Amy Ruck Kagan	Operations B
Is the school expecting student/teacher ratios of 18:1 in the first year? If so, what numbers are being used to calculate the ratio?	Kebbler Williams	Budget Narra
The projected \$54,000 for transportation will not be enough. Additional funds should be set aside. The contingency plan should be more specific and provide a clear plan for where and how additional funds will be cut.	Greg Schermbeck	Budget Narra

Reviewer	Score
Mike McLaughlin	
Cheryl Turner	
Helen Nance	
Alex Quigley	
Kebbler Williams	Pass
Alan Hawkes	
Sherry Reeves	
Amy Ruck Kagan	Pass
Tracy Kelley	Pass
Leigh MObley	
Steven Walker	

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Greg Schermbeck	Pass
Becky Taylor	
Joe Maimone	
Tammi Sutton	
Eric Sanchez	
Phyllis Gibbs	

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VII AGREEMENT PAGE

Application Fee:

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

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

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

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

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

ataylor26

Date: 09/26/2014

Applicant Signature:

The foregoing application is submitted on behalf of Cardinal Charter Academy at Knightdale (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: ataylor26

Board Position: Allen Taylor

Signature: _____

Date: 09/26/2014

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

Notary Public Official Seal

My commission expires: _____, 20____.

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OVERALL ASSESSMENT

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

<u>Total External Evaluator Votes</u>	
No	Yes
1 TS	10 AH, JM, PG, HN, SR, AQ, ES, BT, CT, SW

Would you, as a subcommittee, recommend an interview for this application? Remember that a subcommittee is not a quorum of the whole Advisory Board and has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Subcommittee Votes</u>	
No	Yes
0	4

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

<u>CSAB Votes</u>	
No	Yes
3 BT, HN, CT	7 AQ, ES, AH, SW, SR, JM, PG

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

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Initial Screening	
Mission, Purposes, and Goals	- kwilliams75
Education Plan	- kwilliams75
Governance and Capacity	Five board members are listed in the table, but twice below the table, the application states that there are six members currently on the board. As a result, there is also a missing resume and Charter School Board Member form. - kwilliams75
Operations	- kwilliams75
Financial Plan	- kwilliams75
OVERALL	- dtsmith840 - kwilliams75 - kwilliams75

External Evaluator	
Mission, Purposes, and Goals	<p><u>Mission Statement</u> The mission statement describes the purpose of the school but focuses more on inputs rather than outputs. It does not express an ideal, long term impact, or scope and scale of the school being proposed. There is no articulation of what the school hopes to be or how it will reach a compelling innovative goal. There is no expression of clear guiding principles or priorities indicating what the groups core educational beliefs are. - kellelytracy</p> <p><u>Educational Need and Targeted Student Population</u> The application states that the school will provide a wide array of technology opportunities however there is \$0 set aside for software / hardware. Additional information should be provided. - gscherbeck</p> <p><u>Goals for the Proposed Charter School</u> The academic goals meet the evaluation criteria, but there are no goals included for the proposed school's operations, finances, or governance. - kwilliams75</p> <p><u>Goals for the Proposed Charter School</u> Adequate information is provided. - gscherbeck</p> <p><u>Goals for the Proposed Charter School</u> The goals pertaining to operations, governance, culture, student staff retention, and finance are not included. Achievement goals do not provide for year 2 goals. Growth goal providing for 10% growth per year culminating in 70% proficiency goal at year 5 is low. There are no goals for technology usage or mastery by students, which is central to overall mission. - kellelytracy</p>
Education Plan	<p><u>Instructional Program</u> Detailed information related to instructional methods was not included. - kwilliams75</p>

	<p><u>Instructional Program</u> The assessment strategies should be outlined in greater detail. Formative and summative assessments should be administered coupled with daily and ongoing data analysis. - gscherbeck</p> <p><u>Instructional Program</u> The assessment plan is not clear and does not show how it will be aligned with state standards. The application does not include a list of assessments to demonstrate an appropriate evaluation process (no universal screen er has been identified although mentions a diagnostic will be used to group students.) No discussion of how personal learning plans will be used or monitored, revised or how instructional focus plans will be used or monitored, revised or created. There is no plan, systems, structures, processes for how the school leaders will evaluate the effectiveness of the academic program or plans on how, if necessary, it can and would be revised to better suit student needs. The applicant does not describe the instructional methods/strategies to be used and how they align with stated mission, tied to the curriculum and desired student outcomes and assessments. - kelleytracy</p> <p><u>Curriculum and Instructional Design</u> Fourth quarter ends on May 29th, but the last day of school for students is June 11th, following a May 21 - June 11 testing window. What will be done during this time besides testing? Is May 31 - June 11 part of the 185 instructional days? - kwilliams75</p> <p><u>Curriculum and Instructional Design</u> Appendix B is attached but should provide additional details. The related units and objectives should be listed for each grade level. There should also be a clear connection between their curriculum with the NCSCOS.</p> <p>Appendix C is not a sample calendar but rather a list of details. A full calendar and related details should be provided.</p> <p>- gscherbeck</p> <p><u>Curriculum and Instructional Design</u> Instructional strategies are unlikely to result in high outcomes for kids as they are not calibrated to activate higher order thinking. There is no indication that students will be intentionally given the opportunity to examine, analyze, or interpret information; form predictions, express their point of view and support it w/ evidence (critique, defend, justify). There is no deliberate focus on giving student opportunities to apply new information by solving problems to deepen their understanding via activities like change, apply, construct or manipulate. The sample scope/sequence does not provide materials or identify resources. There are no details supporting the conclusion that the curriculum framework aligns with stated mission, especially pertaining to blended learning, individual learning plans. The description of the curriculum presented does not provide sufficient detail regarding alignment, objectives, content, instructional strategies, material and resources. Application does not effectively connect the proposed instructional practices with the schools mission nor describe how the instruction will be differentiated in the classroom to meet the needs of all students (AIG and at risk tier I)Research to support the proposes instructional practices is limited and not aligned to stated mission. - kelleytracy</p> <p><u>Special Programs and "At-Risk" Students</u></p>
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(1) The discussion of ELL students mentions an extended school year. This is the first time this is mentioned in the application. What does ESY consist of for ELL students?
(2) What will the school do if the ELL student needs more intensive services than the mainstream/inclusion model provides? - kwilliams75

Special Programs and "At-Risk" Students

Specific information should be provided regarding how instruction will differ for academically gifted students. Data analysis should also occur more frequently than every quarter. - gscherbeck

Exceptional Children – Identification and Records

Concerns: 1) Referral process 2) 504 plan requirements (not part of special education) 3) Role of the IEP Team 4) Parental consent

Questions: 1) What is the plan if a parent makes a referral for special education testing? 2) What is the responsibility of the IEP team, specifically in the referral and eligibility processes? 3) When is parental consent required? 4) Is there be a requirement before a teacher can refer a student? If so, what is the requirement? (Policy does not state there has to be a "required component" before a teacher can refer a student for evaluations.) - michelle_mobley

Exceptional Children – Education Programming

Additional information should be provided regarding FAPE and other services and programs that will be provided. - gscherbeck

Exceptional Children – Education Programming

Concerns: 1) Lack of information on the continuum of services 2) Clinical services (unclear what this means) QUESTIONS: 1) How will the school provide the continuum of services, including resource and separate setting? 2) What is the license requirement for EC teachers? - michelle_mobley

Student Performance Standards

(1) No student performance standards are included here.
(2) The exit standards for the last grade served do not include what students should know and be able to do.
(3) If a student chooses not to waive his or her elective, when will he or she participate in course recovery or intensive reading or math? - kwilliams75

Student Performance Standards

Performance standards should be more specific. These goals should set specific benchmarks that are clear for both students and teachers. There should be clear benchmarks for each content and for each grade level.

Appropriate evidence is provided for assessment tools and promotion to the next grade level. - gscherbeck

Student Performance Standards

The applicant does not provide details on a plan to monitor progress toward meeting the goals of the school. There is no plan details relating to how the school will evaluate the effectiveness of the academic program. There is no evidence (structures/PD, planning time, processes, systems, person responsible) that data will be used effectively to drive instruction and improve curriculum over time. performance standards are not SMART. - kellestracy

	<p><u>Student Conduct and Discipline</u></p> <p>(1) Definitions of offenses which may result in suspension or expulsion are not included. (2) How is the requirement to purchase an agenda for \$10 not the same as charging a fee? (3) Is a long-term suspension a reasonable consequence if a student has a Red Bull or Monster Energy Drink? (4) The student handbook needs to be specific in describing the process of a student requesting a hearing in case of suspension. (5) There are two sets of consequences for uniform violations in the student handbook. Which is correct? What supports are in place to help parents pay for uniforms who are financially unable to pay? (6) ID badges are mentioned under money collection in the student handbook. Are students required to purchase ID badges also? (7) The school is planning to follow the NC DPI Pupil Progression requirements for students in grades K-7, but does not explain what this means in the student handbook. (8) Page 34 of the student handbook mentions that complaints will be handled according to Florida Statutes. What about NC Statutes? - kwilliams75</p> <p><u>Student Conduct and Discipline</u></p> <p>The student conduct plan should be more specific and explain the framework of how students will be held accountable throughout the school year. The applications lists specific behaviors that are unacceptable and potential consequences yet it's unclear how those consequences will be decided upon. Acceptable behaviors and related consequences should be clearly outlined in order for faculty, students, and teachers to understand.</p> <p>A draft handbook is attached but is the same as other CUSA handbooks. It should be tailored to the specific needs and demographic of each proposed school.</p> <p>- gscherbeck</p> <p><u>Student Conduct and Discipline</u></p> <p>Applicant does not provide details on how the school policies, practices, structures will incorporate Responsive Classroom program and reflect everyday the social skills of cooperation, assertion, responsibility, empathy, and self control. There is no articulation of how school will build a school community, establish a common language, shared values, or core principles. There is a profound lack of intentionality around what will be celebrated, or how or what positive behaviors will be recognized and negative behaviors discouraged. There lacks a cohesive nurturing environment that includes developmentally and linguistic creeds, mottos, chants, slogans, or pillars, school colors, mascots etc. There is no alignment between the mission "student-centered" environment.</p> <p>Student handbook articulates discipline policies and procedures that are not aligned to stated responsive classroom or developmental design as articulated in application. - kellestracy</p> <p><u>Student Conduct and Discipline</u></p> <p>The information regarding discipline for students with disabilities is incomplete according to NC policy 1504-2. The purpose of the manifestation determination is not defined correctly. This section should include students not yet identified but suspected of having a disability and services required after the 10th day of suspension. - michelle_mobley</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u></p> <p>Not selected because status has not been obtained. - gscherbeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u></p>

- (1) Five board members are listed in the table, but twice below the table, the application states that there are six members currently on the board. As a result, there is also a missing resume and Charter School Board Member form.
- (2) Is it best practice to have the principal report to the EMO instead of the board of directors?
- (3) The criteria regarding the evaluation of the governing board, board members, and the EMO are not included.
- (4) The bylaws mention the possibility of holding meetings electronically. How will this be done and still meet the requirements of the Open Meetings Law?
- (5) There is a discrepancy between the bylaws and the conflict of interest policy. The bylaws state, "All Officers shall serve as volunteers without compensation." The conflict of interest policy states, "A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that members compensation."
- (6) The board's enrollment policy does not follow general statute regulations regarding sibling preference for schools operating in the first year.
- (7) Additional information is requested regarding the criminal background history for Kim Brown. - kwilliams75

Governance and Organizational Structure of Private Nonprofit Organization

what is the Triangle CEA?

same board members as the replicating school?

nothing about evaluation

- aruckkagan

Governance and Organizational Structure of Private Nonprofit Organization

Organizational chart is the same as others submitted for CUSA schools. Further, the charters should specifically lay out how teachers, within their teams and grade levels will be structured. It should also highlight any potential leadership positions for teachers.

Appropriate information was provided for this section of the application. The review team should ensure that there is adequate academic and over-crowding demand for a CUSA school. - gscherbeck

Governance and Organizational Structure of Private Nonprofit Organization

Governance board members reflect only minimal diversity of experience and skill set. A plan for recruiting more board members exists but will not likely result in recruiting members with necessary skill set. There is no description of the process to transition to an official board. There is nothing about Board composition that indicates they have the capacity to hold the EMO accountable for student outcomes, operational , financial, or programmatic implementation.

Why did the board opt to replicate an CSUSA school rather than replicate its own school?

What are the indicators of success from the current school, if any? How will this proposed school be different from Cardinal? what lessons have been learned about charter operations that will be applied to the current school. Please describe the evaluation criteria used to evaluate Board governance at Cardinal. Applicant should pressed to explain in detail what indicators, concerning student achievement, warrant partnering with CSUSA again, before the 1st school year is complete. What leading indicators make expansion a good idea at this time. What challenges did they experience, what would they have done differently, what lessons did they learned from Cardinal Academy and what will they do differently going forward. What data was in deciding to choose CSUSA for Cardinal? The plan for annual self evaluation is insufficient and funding and time allocation for Board

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training is insufficient. There is no description of administrator qualification that is aligned with stated mission and there is no description for how CSUSA will evaluate school leader. There is no articulation of any committees that have been set up, even for Cardinal already in place.
- kellestracy

Proposed Management Organization (EMO/CMO)

- (1) How has the financial management at Cabarrus Charter Academy led to a zero fund balance? Will this same style of management be employed at Cardinal Charter Academy of Knightdale, if allowed to open?
 - (2) What is the facility buyout process?
 - (3) Provide more details regarding the financial history and performance of the EMO.
- kwilliams75

Proposed Management Organization (EMO/CMO)

how can they demonstrate readiness to replicate?
continued concern- record of CSUSA
worrisome fund balances - aruckkagan

Proposed Management Organization (EMO/CMO)

All sections provide appropriate information.

Consideration should be taken regarding the need of a charter school in the proposed area.
- gscherbeck

Proposed Management Organization (EMO/CMO)

Management agreement indicates that CSUSA performance goals lack SMART goals regarding student achievement targets, operation, financial performance, student or teacher retention and enrollment targets. - kellestracy

Charter School Replication

The Form 990 that is included with the application is for the NC Charter Educational Foundation, Inc. That is the applicant group for 2 other charter schools, but not for this one. - kwilliams75

Charter School Replication

need academic detailed info, staffing
how will the board manage 4 schools?
check on appendix s - aruckkagan

Charter School Replication

Financial and academic performance are sufficient however, the charter review team should consider if these CUSA schools are serving students and neighborhoods that need charter schools the most. - gscherbeck

Charter School Replication

Not clear why the Board is proposing to replicate Hollywood in FL rather than proposing to replicate its own CSUSA managed school in NC. - kellestracy

Projected Staff

A projected list of staff positions are listed however, no qualifications are provided. - gscherbeck

Staffing Plans, Hiring, and Management

- (1) Does the board have in writing the approval by NCDPI legal counsel the joint employment of the school's teachers and the sole employment of the school's administration and other staff?
- (2) The Nepotism policy and Worker's Compensation policy included in the faculty handbook reference Florida Statutes. Has the EMO researched North Carolina Statutes?
- (3) This section does not include information regarding dismissal of employees or proposed salary ranges. - kwilliams75

Staffing Plans, Hiring, and Management

There is no mention of how CUSA or school leadership plans to retain high-quality teachers.

Handbook is attached however appears to be the same draft as other CUSA policies. - gscherbeck

Staffing Plans, Hiring, and Management

The recruiting plan for teachers is not aligned to the stated mission to support student centered learning integrated with technology. The retention plan lacks specific strategies that will be used to retain more highly effective teachers and dismiss as many ineffective teachers has possible. How will the 2 campuses collaborate, share resources, learning or improve curriculum implementation, if at all? - kelleltracy

Staff Evaluation and Professional Development

- (1) This section describes professional development for beginning teachers only.
- (2) The core components of the professional development plan and how it will support the implementation of the education plan for all staff are not included.
- (3) Does the professional development budget include professional development for non-beginning teachers? - kwilliams75

Staff Evaluation and Professional Development

who is on the TST?
- aruckkagan

Staff Evaluation and Professional Development

PD plan is misaligned as there is not description of the QUEST program, training on creating student centered learning environment or technology infused learning, or differentiation. The PD is centered mainly around new teacher supports and focused on inputs rather than student learning. There is a process for evaluating teacher effectiveness, however it is unclear as to how this is tied to student academic progress.

In general, the PD plan does not include purposeful school based job-embedded approaches like instructional coaching or contain learning. The school plan does not provide for structures for regular, frequent collaboration to improve implementation of the curriculum and instructional practices or structures for collaboration that are evaluated for their effect on raising student achievement. There are no details on whether time is built into the schedule for staff collaboration and collaboration serving as PD. - kelleltracy

Marketing Plan

The marketing plan should include clear benchmarks for students applications and targeted neighborhoods. Ensuring the school is specific with their marketing plan will set the school up for success in their founding year. - gscherbeck

Marketing Plan

The marketing and recruitment plan does not include SMART goals to measure there effectiveness or hold EMO accountable. - kelleltracy

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	<p><u>Parent and Community Involvement</u> There are no community org identified with who students will have out of school relationships. - kellelytracy</p> <p><u>Admissions Policy</u> how is SIS being accessed? - aruckkagan</p> <p><u>Projected Student Enrollment (Table)</u> Waiting list data should be confirmed before agreeing that 600 is a realistic number of students in the schools founding year. - gscherbeck</p> <p><u>Projected Student Enrollment (Table)</u> Opening with such a high number is not in keeping with best practices especially absent a track record of success fromm the other school. - kellelytracy</p>
Operations	<p><u>Transportation Plan</u> The transportation plan is not thorough. A clear plan and related budget should be established. Further, \$54,000 is not a sufficient amount to set aside for transportation costs. - gscherbeck</p> <p><u>School Lunch Plan</u> What is the contingency plan to ensure students who would normally qualify for free and reduced lunch receive a full meal daily if the school's application for participation in the NSLP is not accepted? - kwilliams75</p> <p><u>Civil Liability and Insurance</u> The total cost of insurance is \$59,220, which is less than the budget line item (\$74,660 for the first year). Why is there a discrepancy? - kwilliams75</p> <p><u>Facility and Facility Contingency Plan</u> A realistic plan is outlined however more information should be provided regarding the potential lots and development opportunities in the proposed neighborhoods.</p> <p>Appendix Q and R are not attached. More specific contingency plans are required.</p> <p>- gscherbeck</p> <p><u>Facility and Facility Contingency Plan</u> The contingency plan does not include enough detail about the method of finding an alternative temporary location. - kwilliams75</p> <p><u>Facility and Facility Contingency Plan</u> nothing concrete how did they arrive at rent? no real contingency - aruckkagan</p>
Financial Plan	<p><u>Budget Revenue Projections from Each LEA (Table)</u> Additional information should be gathered regarding if reaching 600+ students in its opening year is feasible. - gscherbeck</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> Appropriate information is provided. Again, the school should present enough information to ensure the projected enrollment is met. - gscherbeck</p>

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	<p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> big reliance on other funds - aruckkagan</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> \$0 is set aside for custodians. This should be investigated. - gschermebeck</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> (1) What are the 46 instructional support positions (that increase to 64, 72, 73, and 75 in subsequent years)? (2) If the school administrators and other such staff are sole employees of the EMO, why are their salaries a part of the personnel budget for the school, rather than part of the EMO's budget? - kwilliams75</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> The following should be questioned:</p> <p>\$348,100 - Other facility funds - This seems like a large amount of funds without being specifically earmarked.</p> <p>\$0 - Computer & Software - Some funds should be set aside for computers and software.</p> <p>\$597,334 - Instructional Technology - Information should be provided regarding how these funds will be utilized.</p> <p>\$2,000 - Texts - Low amount of funds for textbooks.</p> <p>\$0 - Copy Paper - The school will need paper for daily class materials, exit tickets, and homework. Troubling that \$0 is earmarked for copy paper. - gschermebeck</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> high numbers comparatively high computer cost in year one high comms and telephone why the range in legal fees and financial fees what is other professional major decrease in marketing - aruckkagan</p> <p><u>Budget Narrative</u> The projected \$54,000 for transportation will not be enough. Additional funds should be set aside.</p> <p>The contingency plan should be more specific and provide a clear plan for where and how additional funds will be cut. - gschermebeck</p> <p><u>Budget Narrative</u> Is the school expecting student/teacher ratios of 18:1 in the first year? If so, what numbers are being used to calculate the ratio? - kwilliams75</p>
OVERALL	<p><u>Cover Page</u> Its not clear why this is not a replication of Cardinal Charter Academy which is lead by current Board. - kelleltracy</p> <p><u>Grade Levels Served and Total Student Enrollment:</u></p>

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	Much detail should be included regarding the academic need for the school and the plan to recruit 661 students in its opening year. Seven-grade levels and 600+ students is a serious endeavor in a school's founding year. - gscherbeck
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Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	Mr. Sanchez asked for the demographics of the current school. There are 41% white, 11% black, 2% Asian and 2% Hispanic and the rest are other. Knightdale is hungry for school choice.
Education Plan	The curriculum is based on Marzano and is very strong in being able to to be to provide for the Knightdale area because they teach, test and re-instruct. The model is project based and blended learning.
Governance and Capacity	The board already governs Cardinal Charter Academy at Cary. The board members introduced themselves. The board chair explained Lee Teague has been recently added to the board. Mr. Hawkes asked if this is the same board for the charter school in Cary. The board replied they would be replicating the model in Cary. In the application the board chose to replicate a school in Florida but would have liked to note it would replicate the school in Cary. Mr. Quigley asked if the board had plans of opening an additional school. The board chair replied Knightdale did not have an option for school choice. The board would like to do things at a pace that could be handled. The board has looked at other states and other models for a board who manages multiple schools. The board has interest of running several schools.
Operations	Mr. Quigley asked what has worked well with CSUSA and what is area of growth. The board replied there was difficulty with the snow days and the year growing with CSUSA. The dashboard is something the board asked CSUSA to create. Mr. Quilgey asked if the school would be offering transportation. The budget will be adjusted once enrollment is established.
Financial Plan	
OVERALL	This application will be recommended to the SBE to move forward to the Preliminary Planning Year.

Overall Summary	
Initial Screening	OCS deems this application incomplete.
10/23/2014	The CSAB voted 10-1 to deem this application complete on November 14, 2014.
Application Review	On March 9, 2015 the CSAB subcommittee voted to move this application to interview. The subcommittee vote was 5 to 0 . The full CSAB vote was 11 to 0. Mr. Maimone made a motion to move this application to interview. Mr. Sanchez seconded.

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	<p>In the full CSAB Ms. Nance made the motion to move this application forward to interview. Ms. Reeves made the second.</p> <p>Concerns outlined consisted of the following: Mr. Maimone questioned the projected enrollment of 661 students. The board chair stated that Knightdale is in desperate need for a school of choice. They have surveyed 530 parents 99% said they were interested in a charter school. Mr. Maimone asked if they would like to fast track and not attend the planning year. The board chair said they would like to fast track but it was not an option at the time.</p>
Application Interview	<p>On April 13, 2015 the CSAB voted to recommend this application to the SBE to start the planning year. The full CSAB vote was 7 to 3.</p>
OVERALL	<p>This application will be recommended to the SBE to move forward to the Preliminary Planning Year.</p>