



### 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:

Alan Hawkes  
Becky Taylor  
Helen Nance  
Shannon Sellers  
Tracy Kelley  
Alex Quigley  
Cheryl Turner  
Greg Schermbeck  
Leigh MObley  
Steven Walker  
Amy Ruck Kagan

#### Date of Review:

10/22/2014



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **Francis Classical School**

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

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

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

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

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

**APPLICATION DUE DATE/TIME**

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

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

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

**APPLICATION SPECIFICATIONS**

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

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

## TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	5
	Grade Levels Served and Total Student Enrollment:	7
	Concerns and Additional Questions	9
II.		
	<u>MISSION and PURPOSES</u>	10
	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	19
III.		
	<u>EDUCATION PLAN</u>	21
	Instructional Program:	21
	Curriculum and Instructional Design:	22
	Special Programs and "At-Risk" Students	29
	Exceptional Children	32
	Student Performance Standards	35
	Student Conduct:	38
	Concerns and Additional Questions	40
IV.		
	<u>GOVERNANCE and CAPACITY</u>	42
	Governance:	42
	Governance and Organizational Structure of Private Non-Profit Organization:	42
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	52
	Private School Conversions:	52
	Projected Staff:	52
	Staffing Plans, Hiring, and Management	53
	Staff Evaluation and Professional Development	59
	Enrollment and Marketing:	63
	Marketing Plan	63
	Parent and Community Involvement	65
	Admissions Policy	66
	<u>PROJECTED ENROLLMENT</u>	69
	Concerns and Additional Questions	70
V.		
	<u>OPERATIONS</u>	71
	Transportation Plan:	71
	School Lunch Plan:	71
	Civil Liability and Insurance	72
	Health and Safety Requirements:	72
	Facility:	72
	Facility Contingency Plan:	74
	Concerns and Additional Questions	74
VI.		
	<u>FINANCIAL PLAN</u>	
	Budget: Revenue Projections from each LEA 2016-17	76
	Total Budget: Revenue Projections 2016-17 through 2020-2021	77
	Personnel Budget: Expenditure Projections 2016-17 through 2010-2021	78
	Operations Budget: Expenditure Projections	80
	Overall Budget:	82
	Budget Narrative:	82
	Financial Compliance:	86

<u>Concerns and Additional Questions</u>	<u>87</u>
<u>VII.</u>	
<u>AGREEMENT PAGE</u>	
<u>Application Fee:</u>	<u>89</u>
<u>Applicant Signature:</u>	<u>89</u>
<u>VIII.</u>	
<u>APPENDICES</u>	
<u>OVERALL ASSESSMENT</u>	<u>89</u>
<u>Total External Evaluator Votes</u>	<u>90</u>
<u>Total Subcommittee Votes</u>	
<u>CSAB Votes</u>	<u>90</u>
<u>Initial Screening</u>	<u>91</u>
<u>External Evaluator</u>	<u>91</u>
<u>Charter School Advisory Board Subcommittee</u>	<u>100</u>
<u>Overall Summary</u>	<u>103</u>

## **I. APPLICATION CONTACT INFORMATION**

Name of proposed charter school: Francis Classical School

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

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

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

Name of contact person: *Rev. Dr. Frederick G. Grosse*

Title/Relationship to nonprofit: *Superintendent*

Mailing address: 617 N. Summit Avenue  
Charlotte NC 28216

Primary telephone: 704-369-2505 Alternative telephone: 704-607-2847

E-Mail address: fred.grosse@elonhomes.org

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

County: MECKLENBURG

LEA: 600-Charlotte-Mecklenburg Schools

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

No:

Yes:

If so, provide the name of the third party person or group. Barney Charter School Initiative of Hillsdale College

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.

The Barney Charter School Initiative has provided multiple educational

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

opportunities, guidance and review of the Francis Classical School (FCS) application. The Barney Initiative, established in 2010, is a project of Hillsdale College devoted to the education of young Americans. Through this initiative the College will support the launch of K-12 charter schools based on a classical liberal arts model with a strong civics component. These schools will train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Key characteristics of charter schools assisted by Hillsdale include:

- The centrality of the Western tradition in the study of history, literature, philosophy and fine arts.
- A rich and recurring examination of the American literary, moral, philosophical, political and historical traditions.
- The use of explicit phonics instruction for the teaching of reading.
- The teaching of Latin.
- The acknowledgement of objective standards of correctness, logic, beauty, weightiness, and truth intrinsic to liberal arts.
- A school culture demanding moral virtue, decorum, respect, discipline, and studiousness among students and faculty.
- A content rich curriculum.
- A faculty where well-educated and articulate teachers explicitly convey real knowledge to students using traditional teaching methods.
- A school that uses technology effectively without diminishing the faculty leadership crucial to academic achievement.
- A school with a plan to serve grades K through 12, although the grades at school opening may be scaled back if reasonable.

A charter school fortunate to receive assistance from Hillsdale College is not charged a fee. Instead, in fulfilling it's own mission, at no cost to the charter, the Barney Initiative offers guidance from professors and administrators who are masters in their fields. Hillsdale provides models, resources and guidance on the development and operation of a school's academic program, policies, curriculum and teaching practices, consistent with the terms and conditions of the school's approved charter application. Hillsdale also assists with the search and appointment of a Principal. In all instances, the terms and conditions of the school's approved charter application shall control all decisions.

Hillsdale College may offer advice with respect to strategies for the operation of the school, such as improving the performance of students. However, the decision whether to implement any particular strategy will be made solely by the school. There is no partnership, employer-employee relationship, agency relationship or any relationship implying control over the school, the governance of the school, or the operations of the school. All decisions with respect to the curriculum and teaching materials of the school are made by the school and consistent with applicable laws and regulations, and the approved charter application. Hillsdale provides teacher education seminars, a Principal Boot Camp and other professional development. Hillsdale provides a model and does not replicate schools.

Hillsdale is currently assisting eight classical charter schools in the U.S. (2 in Georgia, Florida, Arkansas, Nevada, 2 in Texas, New Mexico) that are beginning their first, second or third year of operation. Four of the

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

schools opened K-10, while the others opened K-8 or K-6. Most are operating at or near full capacity, and are fiscally sound. Hillsdale is working with several additional groups in various stages of seeking a charter, including the board of FCS.

Hillsdale is available for assistance throughout the operation of the school.

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

No:

Yes:

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

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

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

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

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

No:

Yes:

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

*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*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	K,01,02,03,04,05,06,07,08	486
Second Year	K,01,02,03,04,05,06,07,08,09	540
Third Year	K,01,02,03,04,05,06,07,08,09,10	594
Fourth Year	K,01,02,03,04,05,06,07,08,09,10,11	648
Fifth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	702

*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.*

francisclassical2016

*Signature*

Superintendent

*Title*

francisclassical2016

*Printed Name*

09/26/2014

*Date*



<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>486 students seems high for Charlotte area schools as several that opened in 2014-2015 have struggled to reach 100.</u>	<u>Shannon Sellers</u>	<u>Grade Levels</u>
<u>I have concerns about how realistic it is to enroll k-8year 1. Given that Kennedy charter is currently transitioning from alternative charter school to a reg charter school, and the learning outcomes have been less than stellar in terms of student academic achievement levels, concerns persist around the organizational capacity of this group to take on another k-8 charter at this time.</u>	<u>Tracy Kelley</u>	<u>Grade Levels</u>
<u>opening K-8 is high stakes and requires different skillsets</u>	<u>Amy Ruck Kagan</u>	<u>Grade Levels</u>
<u>Additional questions should be asked regarding why the school is opening as a K-8 and with 54 students per grade level.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>
<u>Opening a K-8 in a schools first year is aggressive and potentially damaging. Further, it is unclear how the school will be financially sustainable with only 54 students per grade level.</u>		

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Alan Hawkes</u>	
<u>Becky Taylor</u>	
<u>Helen Nance</u>	
<u>Shannon Sellers</u>	<u>Pass</u>
<u>Tracy Kelley</u>	<u>Pass</u>
<u>Alex Quigley</u>	
<u>Cheryl Turner</u>	
<u>Greg Schermbeck</u>	<u>Pass</u>
<u>Leigh MObley</u>	
<u>Steven Walker</u>	
<u>Amy Ruck Kagan</u>	<u>Pass</u>

## II. MISSION and PURPOSES

(No more than three total pages in this section)

### **Mission:**

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

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

To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

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

The FCS school mission was adopted with permission from the Barney Initiative. Through this mission students will learn:

- To read, to write, to do arithmetic; to seek mastery in liberal arts and sciences.
- Cultural literacy. There are many things everyone living in this country needs to know to successfully enter into the public sphere and into worlds of meaning closed to the uninformed.
- That virtue is the road to true happiness.
- To pursue not just life, but a good, civilized life.

### **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.*

Francis Classical School (FCS) will target K-8 students in the Mecklenburg County area in its first year and will grow to serve K-12 students by its fifth year. Families, educators, taxpayers, and others including educational pioneer E. D. Hirsch believe the responsibility of U.S. public schools is to educate competent American citizens. This is the intent of FCS. American students, specifically Charlotte/Mecklenburg students, represent a diverse demographic population, and our targeted population is reflective of this diversity. The FCS curriculum and supplemental programs were selected specifically to meet the needs of all students within Mecklenburg County and we expect a population of students from diverse racial, ethnic and economic backgrounds with diverse learning abilities.

FCS student demographics will closely reflect that of Charlotte-Mecklenburg Schools (CMS) which currently serve more than 142,600 students consisting of the following demographics: 42% African-American students, 32% White students, 18% Hispanic students, 5% Asian and 3% American Indian or multiracial. Additionally, more than half of CMS students are economically disadvantaged, and we anticipate this will be true for a similar percentage

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

of FCS families. We intend to locate the school in an area in Charlotte that ensures accessibility for economically disadvantaged families, such as the Plaza Midwood/NoDa area or West Charlotte. This is in keeping with our parent organization's (EHSC) 107 year old mission of service to at-risk children. E.D. Hirsch and others have noted the correlation between the wide economic gap between rich and poor and the gap in educational achievement.

While the 2014 CMS data show areas of improvement, a deeper study of the data indicates much improvement is still needed. For example, the CMS graduation rate for 2014 is 85.2%, but this reflects the second class of students that needed only 24 credits to graduate compared with 28 credits in past years (a reduction of 22%). In addition, disparities in learning persist between black and white students. In 2014 elementary and middle school reading scores, 81.4% of white students were proficient compared to 42.9% of black students. These statistics are not acceptable in public schools (at a cost in 2013-14 of 38% of the NC state budget, according to the John Locke Foundation).

Our continuous research to identify the most successful curriculum and instructional strategies has led us back to basics (classical education), and therein lies our innovation. Our curriculum and instruction is time tested and research based, and has been successfully implemented for students from academically, socially and economically-varied backgrounds.

We intend to attract a diverse group of students reflective of Mecklenburg County and CMS. We also expect the families who choose FCS to be excited about the mission "to train the hearts and improve the minds of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue." This includes families who understand, as the Founding Fathers did, that schools should prepare young people for civic life and civic responsibilities.

When at the close of the Constitutional Convention Benjamin Franklin was asked what kind of government the men now known as the Framers had given the country, he famously replied, "A republic, if you can keep it." (From the notes of Dr. James McHenry, one of Maryland's delegates to the Convention, first published in *The American Historical Review*, vol. 11, 1906.) The Founders knew that a republic requires an informed citizenry educated in the public things. Throughout the grades FCS will teach young people the history and theory of their constitutional order to help reverse the trend of ignorance among students today about the American tradition of self-government.

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

The total enrollment of Francis Classical School (FCS) is projected to be 702 once it becomes a full K-12 school (projected for 2020-2021). This is well below the Average Daily Membership (ADM) of Charlotte-Mecklenburg Schools (CMS), the Local Education Agency (LEA), with an average of 708 students for elementary schools, 1,002 students for middle schools and 1,251

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

students for high schools. Recent reports indicate CMS presently serves more than 145,000 total students. The FCS projected enrollment of 702 students will be .48% of the Average Daily Membership of CMS.

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

Francis Classical School (FCS) takes a classical approach to education which is not offered in CMS schools. A study from 1983, *A Nation At Risk*, recommended core subject requirements that build upon prior instruction, a specific measure of achievement at each grade level, and more time in the classrooms with qualified, academically competent teachers - key tenets of a classical education.<sup>1</sup>

FCS will be a classical school with a strong emphasis on civics, American government, history, literature and the arts that builds the capacity to follow one's own conscience and self-govern. The philosophical approach is that all students, regardless of educational experience and goals, benefit from a content-rich educational program that develops academic potential and personal character. FCS will provide a logical, step-by-step process to build each student's cultural literacy - knowledge of the world in which we live. Unlike models that rely heavily on skills development, FCS's content-rich, coherent K-12 academic plan is uniquely suited to address the debilitating lack of cultural literacy among many citizens, as noted by Hirsch and others.

FCS's education plan adheres to the unique classical model, not offered at CMS:

1) It offers Charlotte a K-12 option (by year 5) that today is typically only offered in Charlotte private schools. Students receive a cohesive education which builds upon itself year after year, creating a successful foundation for learning. Associations between academic self-concept, academic self-esteem, and achievement in schools that provide consistency in culture and approach from K-12 have been well demonstrated.<sup>2</sup>

2) It is language-focused: learning is accomplished through written and spoken words rather than through images (pictures, videos, TV).

3) It is systematic, which leads to mastery of each subject.

4) All knowledge is interrelated and fields of study are linked. This is done by taking history as the organizing outline beginning with the ancients and advancing to the moderns in history, science, literature, math, art and music.

5) Students receive explicit, systematic research-based phonics instruction. Through the direct teaching of letter-sound relationships in a specified sequence, the foundation for literacy is established and provides students the ability to decode the printed word.

6) Students receive explicit English grammar instruction. Using tools such as diagramming and the study of root words, students are equipped to speak and write with a high degree of communicative competence leading to the ability to fluently express more complex thought.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

7) The Socratic Method - direct, intentional questions to guide students' understanding of problems and their solutions - is a fundamental part of instruction, particularly in literature and history.

8) All students study Latin to facilitate reading comprehension, build vocabulary and bolster performance in all subjects.

9) Older students study history mainly through primary source documents to foster analytical skills and essential insight into their culture and heritage.

10) Virtues of character are instilled in lower grades through 8 Pillars of Character Education: responsibility, respect, industry, integrity, honesty, courage, citizenship and cooperation. Instruction in the classical virtues (prudence, justice, temperance and fortitude) is introduced in high school as a continuance of the character program.

1 U.S. National Commission on Excellence in Education. (1983). A nation at risk: the imperative for educational reform: a report to the Nation and the Secretary of Education, United States Department of Education. Washington, D.C.: The Commission: [Supt. of Docs., U.S. G.P.O. distributor]

2 Larned, D. & Miller, D. Development of self-concept in grades 1 through 9. Journal of Psychology, Volume 102, 143-155. 197.

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.*

1. Most teacher education programs do not teach classical education, so FCS teachers will learn the skills necessary to implement this model. Our affiliation with the Barney Initiative gives us access to educational masters who will advise and train the teachers. Barney masters will provide

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

10 training days prior to school opening-3 days in subsequent years-as faculty build their knowledge and assume leadership roles including mentoring and training new teachers. Teachers will be instrumental in building the school culture and continuously improving instruction.

3. FCS brings a classical education to Mecklenburg County, which does not currently exist in the public schools, thereby giving parents and students an exceptional proven alternative. Classical education thrived at the time of the American Founding. The Founding Fathers held that schools should prepare young people for civic life and civic responsibilities. Likewise, the ancients designed education for participation in the civic life of the polis or republic. The Founders knew that a republic requires an informed, educated citizenry.

FCS will be grounded in the humanities, the sciences, and the arts utilizing research-based curricula/programs in the elementary and middle schools that have been proven successful for all students, including gifted, those with special needs and English Language Learners (ELL). Curricula include the following: the Core Knowledge Sequence which is a specific, grade-by-grade core curriculum of common learning; Riggs Institute's The Writing and Spelling Road to Reading and Thinking which is a multi-sensory, brain-based approach for teaching "explicit" phonics, reading and language arts that addresses virtually every student's learning style and is an effective remedial program for students with academic challenges; Singapore Math which is a conceptual approach to mathematical skill building and problem solving.

In high school students will receive a classical liberal arts education that aligns with and exceeds NC standards. Students will study all subjects - literature and language, math, history, civics (11th grade) and the sciences - through sound, time-proven methods. As in the lower grades, the curriculum will be rigorous. Students will receive homework, and seniors will be required to compose and defend a Senior Thesis as a capstone to their FCS academic experience.

Examples of the unique elements of the classical liberal arts education model:

- 1) Seamless K-12 programming that minimizes transitions and maximizes academic coherence.
- 2) Literacy skills built through phonics, grammar and Latin instruction.
- 3) Content-rich curriculum that builds critical cultural literacy in all grades (Core Knowledge in K-8 and curriculum built on the Western tradition in 9-12).
- 4) Curriculum-centered instruction and teacher leadership in the classroom.
- 5) Emphasis on civic responsibility and virtue.
- 6) Students grades 7-12 study history substantially through primary source documents.
- 7) All knowledge is interrelated and fields of study are linked by taking history as the organizing outline, beginning with the ancients and advancing

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

to the moderns in history, science, literature, math, art and music.

8) Time management, organizing, memory techniques, note taking, research and study skills are taught.

4. Literacy, the ability to read and write, is declining. Recent statistics and student performance scores suggest that our citizens are not equipped with essential knowledge. Students today struggle to read, write and complete basic arithmetic. Without these skills future learning is impeded if not halted. FCS intends to counter this trend by providing students with a content-rich and academically rigorous education in the classical liberal arts tradition that challenges them and well prepares them for the future. Our goals and standards reflect the improved student learning we expect to achieve.

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

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

Goal 1: The school will demonstrate overall academic proficiency. While this will be monitored in numerous ways, a key indicator will be the overall average percentage of students successfully transitioning from one grade to the next.

2016-17:

Average of 78% of students.

2017-18:

Average of 85% of students.

2018-19:

Average of 87% of students.

2019-20 and in subsequent years:

Average of 90% of students.

The results will be communicated as follows:

Board - annually through monitoring report and Board meeting.

Parents - by report card; and, particularly for students at risk of not transitioning, through formal and informal teacher/parent conferences.

Other stakeholders - annual report, on the website, and public Board minutes.

Goal 2: Students will demonstrate competence in virtues of character. This will be officially measured and included on report cards through a system of: Satisfactory (S); Needs Improvement (N); and Unsatisfactory (U). In grades K-6 the lead teacher will make the judgement call based on the Eight Pillars of Character and in grades 7-12 the judgment will be made by the Assistant Principal based on the Classical Virtues.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Goal 3: Students will demonstrate competence in virtues of citizenship. This will be officially measured as in Goal 2 in grades 7-12 by student participation in a citizenship activity (acts beyond yourself that make life better for the citizenry) or positions of leadership. The judgement will be made by the Assistant Principal and included on report cards.

Goals 2 and 3 will be measured as follows:

2016-17:

75% of students will earn an "S" on each report card.

2017-18:

80% of students will earn an "S" on each report card.

2018-19:

85% of students will earn an "S" on each report card.

2019-20 and in subsequent years:

87% of students will earn an "S" on each report card.

The results of Goals 2 and 3 will be communicated as follows:

Board - after each report card, at the Board meeting.

Parents - report card; and, particularly for students demonstrating likelihood of less than a "S" performance, or moving up a level from the previous report card, through formal and informal teacher/parent conferences during the year.

Other stakeholders - annual report; and after each report card, on the website; public Board minutes.

Goal 4: Students will attend school daily.

Average Daily Attendance (ADA) of:

85% in 2016-17

87% in 2017-18

90% in 2018-19 and all subsequent years.

This will be communicated as follows:

Board - annually at the Board meeting; through the Principal's report at each Board meeting.

Parents - report card; and, particularly for students with attendance issues, through formal and informal teacher/parent conferences during the year.

Other stakeholders - annual report; annual updates on the website; public Board minutes.

Goal 5: Each year the Board will monitor 100% of policies with fidelity to the expectations and schedule outlined in Board policy (Appendix J). These



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

policies are applicable to all operational means, including for example, finance, human resources and treatment of students. Reports that are in non-compliance must be rare and re-monitored within a reasonable, and stated, time frame (such as the next board meeting) to show compliance.

Compliance will be noted in the annual report; the website; and public Board minutes.

Goal 6: Each year the School Board will ensure compliance with 100% of the terms of the charter contract. This will be demonstrated through an annual monitoring report prepared by the Board with assistance of the Superintendent that proves compliance with each section of the charter agreement.

Compliance will be noted in the annual report; the website; and public Board minutes.

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

The Board will know FCS is working toward attaining its mission when the school:

- Reaches its stated goals (above).
- Reaches the Student Performance Standards outlined in the application.
- Meets budgetary requirements and maintains fiscal prudence essential for continuing school operation (proof demonstrated through Board monitoring reports).
- Maintains a high consistent level of discipline and decorum (observable during Board visits, which are considered direct inspection).
- Maintains good relations with parents and other stakeholders as evidenced through monitoring reports.

The Board will have evidence of attaining the school mission statement through monitoring reports that are outlined by "method" and "frequency." Methods include "internal" reports, typically prepared by leadership, with the Superintendent accountable to the Board; "external" reports which include NC mandated tests and the annual audit. Monitoring frequency is determine by:

- 1) Board requirement, outlined in Board policies, which is set by how often the Board needs specific monitoring data to ensure confidence in school/Superintendent performance; and
- 2) calendar mandated timing, such as report cards and state testing.

The goals and standards have specific monitoring dates. Each Board meeting provides opportunities for Board members to hear staff leadership reports, including the Principal's report, and ask questions for clarifications and assurances that the school is on track to meet the Mission.

Linkage with stakeholders will be a part of Board meetings throughout the year and will offer opportunities for the Board to impart information and receive feedback from the community it serves. Teachers, parents and students will be part of occasional panel discussions.

The governing board, parents, faculty and students will receive published reports of student achievement on an individual and collective basis with the intention of encouraging community ownership of learning outcomes and

increased accountability for the teaching and learning practices the school espouses. These practices will be evaluated annually to allow for adjustment of techniques, strategies, curriculum and other relevant programs with the intention of more significantly affecting learning outcomes. Such adjustments will ultimately be incorporated into a school improvement plan to provide a vehicle for continuous, reflective improvement and overall academic success.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
more details about classical education	Amy Ruck Kagan	Mission Stat
<p>There doesn't seem to be a certain targeted student population. It mentions the Charlotte Mecklenburg area but does not address specific targeted population. Still have concerns about 400 plus students in the opening year.</p> <p>Appendix A shows the need for a charter school of this type. How many people were surveyed? What is the targeted population?</p>	Shannon Sellers	Educational
<p>Evidence of Educational Need is attached. More information should be requested including the number of respondents (not %), anticipated school leader and other pertinent information. It lists statistics from other successful charters that follow a similar model, but that does not guarantee success in the Charlotte area.</p> <p>Additional information should also be provided regarding the projected population that will be served at FCS. The given information states the school will serve a similar population to that of any CMS school and will be located in possibly three different areas of the city. However, no information is provided regarding the demographics of those three areas or the related academic achievement metrics of those areas.</p>	Greg Schermbeck	Educational
<p>where has it been tested and with what results? don't yet see correlation between program and target population</p>	Amy Ruck Kagan	Educational
<p>continually mention that classical education thrived at the time of the founding-how will they make it still relevant?</p>	Amy Ruck Kagan	Purposes of
<p>The applicant clearly outlines how FCS will provide expanded learning opportunities in Charlotte (#3). However, the professional development opportunities for teachers is vague. Additional information should be provided regarding the content covered in PD sessions and how success will be measured. Simply stating "10 training days" is not sufficient nor does it guarantee student success.</p> <p>The second box was not checked because the identified purposes are vague and doesn't specify how success will be measured.</p>	Greg Schermbeck	Purposes of
<p>A clear process for performance goals are not outlined nor are performance goals measurable.</p> <p>The listed goals are focused on grades 7-12 and do not provide clear metrics for how success will be measured and why grades K-6 are not a focus point. Further, Goal 1, which indicates academic proficiency, states that success will be measured by students transitioning from one grade level to the next. However, no information is provided regarding how students will progress to the next grade.</p> <p>In all, goals are listed but are clearly defined nor is information provided regarding how each goal will be measured.</p>	Greg Schermbeck	Goals for th
<p>Goals are not clear nor specific. How will these numbers be reached? By what standards are students promoted? Judgement calls can often contain bias. Is there going to be a set standard for an "S, N, or U"?</p>	Shannon Sellers	Goals for th
<p>goals weak and do not demonstrate correlation to standards or assessments governance goal is not measurable stakeholder involvement monitoring and tracking included</p>	Amy Ruck Kagan	Goals for th

Reviewer	Score
----------	-------

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Becky Taylor	
Leigh MObley	
Amy Ruck Kagan	Pass
Cheryl Turner	
Steven Walker	
Alan Hawkes	
Shannon Sellers	Pass
Tracy Kelley	Pass
Greg Schermbeck	Pass
Alex Quigley	
Helen Nance	

### 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.

The overall instructional program is a rigorous classical liberal arts education that aligns with and exceeds NC Standard Course of Study requirements. FCS will form an organized and sequential continuum of learning, focusing on literacy in the humanities, the sciences, and the arts through implementation of research-based curricula/instructional methods that address the disparity in abilities, knowledge and backgrounds expected among the target population.

Elementary and middle school includes:

1) Core Knowledge Sequence (CK) - specific, grade-by-grade curriculum of common learning, developed by E. D. Hirsch, Jr. who cites the disparity in cultural literacy as the primary challenge to closing the achievement gap.<sup>1</sup> One study that investigated the link between cultural literacy and academic achievement found significant positive correlation between cultural literacy for each area of academic achievement across all ethnic and socioeconomic subgroups as demonstrated in a comparison of outcomes on the Cultural Literacy Assessment Test and the Comprehensive Test of Basic Skills.<sup>2</sup> At Hawthorne Elementary in San Antonio, 5th graders exposed to Core Knowledge for 7 years performed significantly better on the state standardized reading test.<sup>3</sup> The impact of this focus on cultural literacy is most significant on subgroups such as low-income and ELL students - demographics we expect. A pre-assessment at the beginning of the year identifies gaps in learning. Teacher-prepared tests at the end of units or sections, observing student participation, and year-end Curriculum-Referenced Tests assess if students have learned the content.

2) Riggs - a multi-sensory, brain-based approach for teaching "explicit" phonics and English literacy. The explicit phonics approach is recommended in a Federal Compilation of Reading Research: Becoming a Nation of Readers. Research almost universally supports explicit instructional practices. Such approaches are considered more effective and efficient as compared to discovery-based approaches (Alfieri, Brooks, Aldrich & Tenengaum, 2010; Ryder, Tunmer & Greaney, 2008) particularly when students are struggling learners. Student assessments include Riggs Reading Inventories - measuring at appropriate levels Phoneme Segmentation, Letter Sound, Letter Name; Word Reading Fluency; Passage Reading Fluency; and Reading Comprehension. Daily assessments ensure remedial needs are quickly identified and addressed.

3) Singapore Math (K-7) - a conceptual approach to mathematical skill building and problem solving. Singapore ensures students are exposed to a

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

manageable curriculum with coherent, cumulative, and specific focus that allows for mastery before introducing new materials, and accommodates multiple learning styles. Grouped by ability, all students, including ELL students, will benefit from the program's clear and simple explanations of math concepts. Assessments include Chapter and Unit Tests.

High school students study traditional liberal arts - language and literature, math, history and government, the sciences- in a coherent, orderly program of specific content, aligned with but exceeding the state content standards.

FCS will administer all state required assessments and use them to measure students' mastery of standards and to evaluate trends across the school, sub-groups and grade levels. Student scores will be compared to peer groups at district and state levels to inform instructional adjustments.

1 <http://www.coreknowledge.org/ed-hirsch-jr>

2 Kosmoski, Georgia, Geneva Gay, and Edward L. Vockell. "Cultural Literacy and Academic Achievement." *Journal of Experimental Education*, Vol 58, Number 4 (Summer 1990), pp. 265-272.

3 Baer, J. (2003). The Impact of the Core Knowledge Curriculum on Creativity. *Creative Research Journal*, 15, 297-30

### **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.*

All Grades

The basic learning environment is a traditional classroom-based setting with a regular class size maximum of 27 students. Each day begins with the Pledge of Allegiance. At the end of the day preselected students lower the flag, fold and store it. Teachers assign serious, quality homework for school nights within guidelines set by grade. Decorum in halls and classrooms is required and each visual object displayed in the school will reflect tenets of the mission. Technology is a tool, not an end, and its use is minimized.

A key component of a classical education is Curriculum-Centered Instruction, and the learning environment will reflect this. Teachers will be front and center, equipped to effectively transfer knowledge, skills and concepts to students. Direct instruction relies upon teacher content mastery. Because vast disparity in student preparation, as well as parent involvement, is likely among the target population, this approach ensures the school does not rely on parents or prior education to provide a baseline of information. Rather, the teachers are expected to have the essential mastery to teach, thus ensuring student achievement.

Elementary

Students attend school from 7:45 - 2:30. Every school day begins with activities designed to convey a clear sense of expectation and demonstrate personal concern for each child. After recitation of the Pledge, students

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

will sing a traditional or patriotic American song, followed by a student's recitation from memory a poem or notable speech (each student is required to offer two recitations during the school year). Teachers interact with each child personally, briefly announce noteworthy academic or project-based accomplishments, make announcements, check school uniforms and inform students of the opening lesson structure.

Teacher instruction will be supplemented by teacher's aides in K-2. Teachers will impart lessons from the front of the class. Generally there will be no quad/pod seating. The school will focus extensively on achieving student literacy and will devote considerable class time to this end. Differentiated instruction will be used for specific student learning needs, timely and specific feedback, and high student engagement. All students will have math at the same time to allow for flexible groupings as prescribed by data. Music, art, foreign language and PE will be offered every other day.

The day ends in an organized manner. Teachers review homework assignments, students line up with possessions and walk outside in line to meet parents/carpool or go to the bus.

### Middle

Sixth grade students will attend school from 7:45 - 2:30 and students in grades 7-8 will attend from 7:30 - 3:30. Each school day will begin in a similar manner as elementary grades to include the Pledge, a song, a student recitation, student recognition by teacher, announcements and uniform checks. Sixth graders will be included in the elementary model of scheduling, with the same content teacher throughout most of the day. This ensures students who are beginning the transition into adolescence have continuity and robust support from a single teacher rather than be thrown into a busy schedule of myriad teachers and challenges. Sixth grade will focus on the various aspects of English language study with differentiated instruction.

For grades 7 and 8, there are seven daily class periods and a 30-minute study hall at the end of the day so that students can consult with teachers, begin homework, and receive remedial reading instruction if needed. Advanced middle school students will have access to high school level math, enabling them to take higher-level coursework in high school.

### High School

Students will attend school from 7:30 - 3:30. There will be 7 academic periods during the school day with an eighth for lunch and a 30 minute study hall at the end of the day. The senior thesis offers a degree of student choice in the learning environment and structure.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet*

*the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*

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

Core Knowledge (CK), Riggs Phonics, and Singapore Math align with the NC Accountability Model that requires academic progress and growth in grades K-8, and builds foundations of knowledge in the early years that prepare students for the rigor of high school and the goals of career and college ready. Because children learn by building on what they already know, this curriculum benefits students with varying learning styles and abilities as we expect among our target population. Emphasizing foundational skills and rich content, teachers can effectively bring students with academic problems up to grade level but also strengthen the knowledge base and challenge the academic potential of every student. Each component includes thorough assessments and assessment guidelines to determine how much learning has been retained and how well prepared each student is for NC assessments. The rich curriculum has been used with success in classical charter schools among students of varied abilities and backgrounds (Appendix A).

CK - the foundation for literature, history, geography, science, visual arts and music - is aligned with the NC Standard Course of Study and provides a plan for coherent, sequenced learning from grade to grade. It is a research proven means for meeting and exceeding state standards. Students gain greater reading comprehension, the ability to think critically and solve problems, and a core understanding of facts and skills fundamental to cultural literacy. Explicit identification of what children should learn at each grade level ensures a coherent, logical progression to building knowledge across all grade levels.

Riggs addresses all learning styles; includes cognitive developmental sub-skills critical to address learning disorders; provides for acceleration in the learning process; and provides multiple resources designed for assisting in differentiation and closing learning gaps for all students. Riggs tools introduce Greek and Latin roots into early grades to establish a stronger foundation in English vocabulary. FCS will provide a robust remedial phonics-led literacy program to work with special education students, and other students of all ages who have not reached grade level in reading.

Singapore maximizes instructional time by focusing on mastery of essential math skills. The focus on number sense, geometry, spatial relationships and measurement in the early grades makes it a perfect match for the NC Standard Course requirements. A daily math block will be scheduled for the purpose of ability-grouping students in grades K-6, allowing for the needs of mathematically-competent students as well as struggling learners to be met. This will enable many FCS students to begin pre-algebra concepts in 7th grade and, with continuing pull out or teacher support as needed in all grades, prepare students for high level math in high school.

High school continues a coherent and orderly liberal arts program that explores ideas and texts intensively and in depth, and ensures mastery and compliance with the NC Accountability Model. Any students newly entering FCS high school without a foundation in science will be offered a course that provides foundations needed for biology and chemistry. Each senior will



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

write and deliver orally a Senior Thesis on a topic that emerges from the curriculum.

At FCS, student academic performance is inextricably linked to 1) nurturing children to strong character and 2) preparing highly literate individuals who are responsible citizens. Teaching and coaching in the classical virtues will be integrated throughout the curriculum in all grades, specifically through student exposure to stories of self-command and self-sacrifice found in classical literature and history.

Students will graduate FCS (95% or more in 5 years) highly literate, responsible citizens ready for young adulthood.

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.*

Following are key instructional strategies teachers are expected to master: 1) Elementary and 6th grade will use Riggs Reading - a multi-sensory and brain-based approach to teaching explicit phonics, reading, spelling, and composition. Teachers use multi-sensory (seeing, hearing, saying, writing) instruction to teach the 71 phonograms, stressing acute listening skills. First, the sound/symbol relationships are taught in isolation (without key words, pictures, capital letters or letter names). Then the learned relationships are applied to words. Spelling is taught through phonic analysis; 47 spelling, plural and syllabication rules; and a memory device marking system so that students can "read" the words, in isolation, by sounding, blending and practicing. Direct Socratic instruction is used in dictation and leads to rapid and accurate learning. Students then begin oral sentences, as the first steps in composition, which the teacher has modeled from the beginning.

Teaching simultaneously through the four multi-sensory pathways not only strengthens weaker pathways, but makes early intervention for the prevention of learning disorders a proven option. Riggs is an intervention tool used at all grade levels to reinforce concepts or re-teach if needed. Riggs lessons for older students are conducted largely during times that do not conflict with core classes and may be substituted for an elective or other non-core course. Teachers of all disciplines will emphasize correct speaking and writing, not just English teachers.

2) Singapore was selected for elementary and 7th grade because it is detailed in instruction, questions, problem solving, and visual and hands-on aids (blocks, cards and bar charts) and ensures that students - grouped by ability - master the material before moving on to the next level. The program presents mathematical skill building and problem solving from a conceptual viewpoint, building from one idea to the next. ELL students benefit from Singapore's clear, simple explanations of math concepts and the program's detailed instruction. A strong math foundation early on ensures students will be successful later.

3) Elementary and middle school teachers must master Core Knowledge (CK), a specific curriculum that outlines the skills and content to be learned grade by grade, thereby eliminating the possibility of gaps or repetition, but also exposes children to shared knowledge needed to be included in a shared

literate culture. The focus on specific content and building background knowledge is especially beneficial for students with learning challenges and ELL students (use of picture walks, chants and multi-media helps). Strategies include introducing new topics while continuing to reinforce and build upon older topics; using concept objectives to help focus on the big picture while details are mastered; and employing graphic organizers to help students keep track of information.

There will always be missed content for some students but, since CK is content-based, not cumulative (as is reading and math), that will not keep students from learning the grade-appropriate content. We will provide opportunities for missed content to be picked up.

4) Curriculum Centered Approach must be mastered. For high school students to pursue knowledge outside of their experience, teachers must be equipped to effectively transfer knowledge, skills and concepts, delivering content front and center in the classroom. Teachers, who can be guided through effective pedagogy, must have content area mastery. Unlike a student centered model wherein students work together, potentially sharing misinformation and limiting their growth, this approach levels the playing field.

5) Socratic method uses direct intentional questions to guide students' understanding of problems and solutions. This encourages logical and independent thinking.

7) Teachers teach the classical virtues through content instruction rather than in isolation.

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.*

Students will be ready to transition from grade to grade primarily due to 1) the content-rich key curricula described herein - delivered by excellent teachers who are masters in their subjects - that contain strategies, assessments, and remediation tools, that are appropriate for all learners; 2) use of ability groupings in math; 3) curriculum centered approach where teachers are front and center, delivering content to students, unlike a student-centered model where students learn from each other and from discovery; 4) emphasis on character and civic virtue which limits distractions to learning that comes from various behavior problems.

The continuity of a classical curriculum grades K-12 - where students a) meet and/or exceed NC Future-Ready Core Course and Credit Requirements and b) develop intellectual and personal habits, values, and skills upon which responsible, independent and productive lives are built - ensures every student is prepared for adulthood, whether the rigors of a competitive university or other post-secondary opportunities.

The Core Knowledge Sequence grades K-8 will expose students to a coherent body of challenging, interesting, interwoven knowledge that not only provides a foundation for learning, but also defines a common heritage and establishes a common ground for communication and cooperation in a diverse society starting at school and continuing throughout one's life. This foundation of knowledge acquired during elementary and middle school will be

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

enhanced through a challenging, content-rich classical, liberal arts curriculum in the high school (that includes a required Senior Thesis on a topic of the senior's choosing from the curriculum) to promote optimal learning and preparation for the future.

Our curricular approach begins with the rudiments of basic literacy as well as math skills in elementary school and continues to the higher orders of thought and expression through middle and high school in an orderly fashion. Every student's mastery of content will be assessed, in large part, by his or her ability to clearly and effectively articulate understanding, synthesizing and analyzing verbally and in writing. These require a solid foundation in literacy and by high school, a superior grasp of communicating and reasoning that is consistently employed and practiced.

For students who are not meeting and exceeding standards, and especially those who are at the bottom of the achievement gap, the school's structure will facilitate success. From highly structured classrooms with content experts as the focus to logical, coherent means of learning foundational skills, students who are not thriving in a previous student-centered educational environment will benefit greatly from the vast grid of rigorous support. Students who struggle in contemporary school settings to meet and exceed expectations because of limited understanding of how to learn academically will receive explicit instruction and modeling in everything they need to know including how to listen, ask appropriate questions, organize information, defend an answer with evidence, and prepare for assessments.

The school's strong civics component, culminating in high school, will equip students to understand, articulate, and practice for their lifetimes the principles on which this country was built: liberty, equality, natural rights, the Rule of Law, Constitutionalism and self-government.

Literacy, a hallmark of FCS, is vital to an individual's and America's political, social and economic success. The ability to read and write is critical during the advancement of technology as people are exposed to more complex information. Some schools tweak their curriculum, in a time where unforeseen changes happen rapidly, by incorporating more technology. But research shows that the first priority is to increase literacy among students, because without it, they will be unprepared for further studies, the workforce and citizenship.

*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?*

Francis Classical School will award a diploma to students who successfully earn 25.5 credits. This exceeds the Future-Ready Core requirements. The rigor and content of the courses offered ensures that even those students who only attend FCS grades 10-12 will still have completed a more rigorous program than many of their peers at other school sites.

Students must have an unweighted cumulative grade point average of 2.0 on a 4.0 scale in order to graduate.

Graduation requirements:

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

ENGLISH 4 credits

Core courses: Classical Literature (2 semesters), British Literature (2 semesters), American Literature (2 semesters), Modern Literature (2 semesters).

MATH 4 credits

In addition to meeting the credit requirement, students must successfully complete Geometry (2 semesters) and Algebra II (2 semesters).

SCIENCE 4 credits

In addition to meeting the credit requirement, students must successfully complete Biology I(2 semesters) and Chemistry I (2 semesters).

HISTORY 4.5 credits

Core courses: Western Civ I (2 semesters), Western Civ II (2 semesters), American History to 1900 (2 semesters), Modern European History (2 semesters), American History 20th Century (1 semester).

GOVERNMENT .5 credits

Core course: American Government (1 semester).

ECONOMICS .5 credits

Core course: Economics (1 semester).

FOREIGN LANGUAGE: 3 CREDITS

In addition to meeting the credit requirement, students must successfully complete one credit in Latin (2 semesters).

COMPOSITION .5 credits

Core course: Composition (1 semester). Depending upon the student's readiness for the standard course, some students may be required to take as a pre-requisite a 1 semester basic composition course.

MORAL PHILOSOPHY .5 credits

Core course: Moral Philosophy (1 semester).

P.E. 1 credit

ELECTIVES 3 credits

TOTAL CREDITS 25.5

We will be using a 4.0 grading scale. The letter and numerical grades for this system are listed below:

A	94-100%	4.0
A-	90-93	3.7
B+	87-89	3.3
B	84-86	3.0
B-	80-83	2.7
C+	77-79	2.3
C	74-76	2.0
C-	70-73	1.7
D+	67-69	1.3
D	64-66	1.0

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

D- 60-63	0.7
F 0-59	0.0

The grading scale as defined above is utilized for all students with the exception of kindergarten and first grade, where the scale will reflect A, B, C, and Needs Improvement. Incompletes will only be given under special circumstances as determined by the Principal.

7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*

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

The calendar is designed to provide the optimum amount of instructional time and professional development with breaks during the year that do not interfere with the learning process that is essential to meeting the charter mission. Francis Classical School plans to generally align a traditional school year calendar to that established by Charlotte-Mecklenburg Schools. The calendar included in Appendix C is an approximation of what the 2016-17 calendar may look like and has no fewer than 185 instructional days in the mandatory school year.

The calendar provides regular student-free days for full staff data analyses and professional development, teacher-parent-student conferences, and the organization of the semesters before and after the winter break to ensure the first semester is fully concluded before students embark on a long break (the second semester will begin when students return to school after the break).

A critical part of the calendar will be scheduling summer professional development in key instructional methods. This will include up to ten days training from the Barney Charter School Initiative prior to the first day of school in foundations of a classical education, Socratic method, Riggs (including remedial purposes), Singapore Math, and others as necessary. There will be three additional days of training on other topics as outlined in the professional development section of the application. In subsequent years, the Barney Initiative will provide three days of teacher training in the summer as teachers gain expertise and mastery, and assume responsibility for certain aspects of training themselves.

### **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.*

All strategies and curricular choices as described in the application were selected for a target population of students from diverse backgrounds and with diverse learning abilities. Our curriculum and supplemental programs are time tested and researched based, and have successfully been implemented for students from academically, socially, and economically varied backgrounds including students at risk of not performing at expected levels.

Emphasis on memory work and recitation will build memory of the foundational skills in all content areas upon which further learning will be built.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Curriculum-centered, direct instruction will create an orderly, focused classroom free of distractions and led by a teacher with content mastery.

Riggs (explicit phonics), Singapore Math and Core Knowledge were selected because these programs are designed to build foundations of knowledge in the lower grades. Because children learn by building on what they already know, this curriculum will benefit students with varying learning abilities. Emphasizing foundational skills and rich content, teachers can effectively bring students with academic problems up to grade level.

Students presenting academic difficulty need programs that address remediation directly and target specific deficiencies. The Riggs method is a time-tested, multi-sensory, brain based approach that addresses virtually every student's learning style. Riggs is appropriate for teaching all students the explicit phonics, reading and language arts they must learn to succeed. Riggs is an effective remedial program for students of all ages with academic challenges.

Low performing students will also be identified through the use of our assessment and diagnostic tools. Students who score below grade level will be given extra support to reach grade level within the classroom as well as pull out instruction. Teachers will also use small group, intensive support as needed.

Francis Classical School will implement the Response to Intervention (RTI) Pyramid. The RTI team will be led by the Student Services Director, who is accountable to the Principal, with the support of the Student Services team (and possibly others who have experience in the RTI protocol). The team will meet regularly to discuss the data, examine the needs of specific students and subgroups, and use this information to guide instruction for all classrooms through professional development and school-wide initiatives. The team will review individual student records to prescribe interventions according to the protocol and ensure that the resources are available and implemented for the student.

The RTI team will use data from ongoing screenings, literacy progress monitoring, and interim assessments, to appropriately place each student in a tier with interventions to meet learning needs. Staff will differentiate instruction in classes and provide intervention time within the school day. Intervention periods will utilize small groups and a variety of teacher-created materials or a research based intervention program that includes lesson plans, instructional routines, and practice materials. Interventions may also include pull-out services if needed. The RTI team will track student data over time.

In addition, the school will offer explicit instruction for all students on study skills, organization, note-taking, and other student success practices that are often incomplete for struggling students.

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.*

Francis Classical School will serve all ELL students using structured English language immersion. The purpose of this will be to assist the English learners in achieving proficiency in the English language as quickly as possible. FCS will comply with all applicable laws.

All students will complete a native language survey when enrolling. Should a parent/guardian indicate that a language other than English is spoken at home, an immediate referral will be sent to the Student Services Director. An initial assessment will be conducted. If the assessment reveals that the student may benefit from language support services, the student will be identified for these services and his/her parents will be notified of the eligibility during a language assessment conference. If necessary students will continue to be monitored. Unless a parent requests a waiver to refuse services, students will then be served through an English immersion program, with language support services administered within the traditional classroom. An assessment will be administered to ELL students at least annually to measure growth and language acquisition.

Students who enter the program will receive support services from a paraprofessional, or teacher. Teachers who provide ELL students' Reading/Language Arts education will have a minimum number of hours of ELL training.

The language immersion program will be a high quality, research-based language support program implemented by the Special Education teacher who works collaboratively with the traditional classroom teacher to provide differentiation to support content mastery and development of the English language. Many of the strategies that are part of the core educational model (such as Latin, grammar, and phonics instruction for all students) have been proven to specifically benefit ELL students. Singapore math provides limited concepts at a given time and is practiced until students achieve mastery. Effective strategies for teaching Core Knowledge include, for example, front loading of information, labeled visuals posted, vocabulary development through visuals, and graphic depictions.

Students will receive the same academic content as English speakers and all instruction will be in English. However, the level of English used for instruction - both oral and written - will be modified appropriately for each ELL student.

An ELL folder will be maintained with confidential ELL student records, including students who have tested out of services. The folder will track student data to help information services and supports for that student, and include copies of the Home Language Survey, eligibility notification to parents, a TPC form and evidence of a TPC meeting and any other appropriate documentation. The Special Education teacher, with support of the Student Services Director, will be responsible for frequent review (at least quarterly) of formal and informal assessment data for each ELL student to ensure the student is making adequate growth, meeting individual and school-wide goals, and achieving at the same rates as their native English speaking peers.

Student eligibility for exit is based on academic performance and results of assessments. The assessments will be administered each spring to all current ELL students in grades K-12 to measure progress. Parents whose native language is not English will be communicated with in the language they prefer. The school will communicate with parents regularly about their student's progress at the school, upcoming events and testing, academic and behavioral expectations, and other important information, in addition to the regularly scheduled home communication.

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.*

As described throughout the application, the curriculum and approach to instruction at FCS has been selected with an expectation of disparate skills, including both struggling learners and those who are designated as intellectually gifted. The school will provide myriad opportunities for students to explore enrichment in the areas where they excel most through comprehensive liberal arts programming during the traditional school day and after-school offerings in response to student and family interest and request. Students who are identified as intellectually gifted will be challenged to meet their intellectual ability primarily within the instructional program.

FCS will identify students as academically or intellectually gifted in accordance with state statute and NC AIG Program Standards. The school's aggressive academic goals will be applicable to all students, with a focus on growth in individual students. The use of differentiated instruction, flexible groupings, advanced course offerings and accelerated pacing will provide many opportunities to address the individual growth needs of our students. FCS will work to develop an explicit AIG program based on the needs of our students and in collaboration with school administration, instructional staff, parents and community members.

### **Exceptional Children**

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

### **Identification and Records**

1. *Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.*
2. *Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed.*
3. *Provide a plan detailing how the records of students with disabilities and 504*



*Accommodation plans will be properly managed.*

- a) *Requesting Records from previous schools*
- b) *Record Confidentiality (on site)*
- c) *Record Compliance (on site)*

Francis Classical School will provide services for students eligible for special education as well as those who qualify for a Section 504 Plan under the Rehabilitation Act in conformance with all federal and state laws as well as the North Carolina policies. Upon enrollment, parents will be asked if their child received any special/support services from their previous school and student records received by the FCS Registrar, will determine if a student has a current IEP or 504 Plan. Additionally, the Student Services Director, who is responsible for special populations, will search the state database for record of eligibility. If a student has an existing IEP or 504 Plan, services will be provided. Re-evaluations will be conducted as needed for individual students to make sure that their IEPs and 504 Plans are up to date, that all required documentation is in place and that students are receiving appropriate services at FCS.

FCS will follow "Child Find" mandates to ensure that all children with disabilities who are in need of special education and related services are identified, located and evaluated. Our Child Find efforts will be incorporated into our general marketing and parent information materials to make sure that families are aware of available services and have the opportunity to seek assistance for their students and the school will make formal referrals if necessary. Professional development will include training on our Child Find obligations and services for children with disabilities so that staff are equipped to assist in the identification of students in need of services. Additionally, print materials describing the services offered for students at FCS will be made available at school.

When FCS conducts school-wide diagnostic assessments we will utilize the resulting data to inform intervention and enrichment programming. Students who require more intensive support will be referred to the Student Services (SS) team which will utilize a problem-solving model to address concerns through more intensive and prescriptive interventions. Progress will be monitored and interventions continued or changed based on student performance and progress toward goals. If a student does not make adequate progress towards goals or otherwise appears to need specialized instruction, then SS will make a referral for special education evaluation. The SS team will then follow the initial referral process adhering to the 90-day timeline.

The 90-day timeline will begin once the referral has been made. FCS will provide the required notice to parents. FCS will contract with appropriate professionals to complete the evaluations. Should the evaluation result in a recommendation that the student is eligible for special education services, an initial IEP will be developed and the student assigned a case manager in the Student Services Department.

FCS will comply with all requirements of state and federal law regarding student records including the Family Educational Rights and Privacy Act and the IDEA. FCS will thereby protect the confidentiality of personally identifiable information in student records and limit disclosures to those allowed by law. The FCS Registrar will maintain cumulative student records.

The Exceptional Children's files will be reviewed for compliance by the Student Services Director and stored in the locked records room. Records will be maintained at the school in a location that is safe, locked and secure, and affords reasonable protection from fire, misuse and access by unauthorized persons. School officials with a legitimate educational interest in the student will have access to student record information. Parents and eligible students will be given the opportunity to inspect and review the student's record. Other disclosures will be allowed as provided by law. School and student information needs for long-term storage will be maintained on-site at FCS.

### 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.*

Ensuring all students receive a Free and Appropriate Public Education (FAPE), Francis Classical School will provide the continuum of services for students who qualify for special education services either because of a prior placement or because of the outcome of the initial eligibility process as described herein. The school will provide a continuum of services that align with each student's IEP and meets their individual needs within the Least Restrictive Environment. Student Services staff will provide consultation and co-teaching at the regular level of service, pullout support at the resource level, as well as a separate level of service as dictated by students' needs.

Student Services will secure contracts for related service providers such as speech, counseling, OT, and others, and contract with additional third-party vendors as necessary to ensure each student has the supports necessary to succeed.

All students, including those who qualify for IEPs, will be held to the same high standards and expected to meet rigorous goals. Students with IEPs will be provided with robust supports, using IEP-dictated modifications and supports as a baseline of services to be provided in the classroom. Although all students will be expected to master the content of the curriculum in all areas, the way that content is approached and practiced will be tailored to the needs of each student under the oversight of the Student Services staff (responsible for special populations). In addition, Singapore math (utilizing ability grouping) and Riggs are proven to work well with all students.

Progress of students with special needs and the success of the school special education program will be evaluated regularly and frequently. Student Services will meet with regular education teachers frequently to closely monitor student progress on informal and formal assessments. The Special Education teacher will observe in classrooms with students who have special needs to compile data to measure students' progress and inform

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

instruction. This will allow Student Services to provide targeted supports within content areas, and celebrate measurable success and improvement. Each semester, the special populations staff will present data on the growth of students with special needs to the Principal and discuss each student and the progress he or she has made on goals. Annually, academic and behavioral progress will be reviewed and changes made to the IEP to reflect the student's current needs and abilities.

Once each semester the Student Services Director will collect student data for students with disabilities and compare it to the progress and trends of their peers without disabilities. This data will be shared with the Principal and other appropriate school leadership so revisions to the school-wide special education program can be made as needed, and changes in instructional strategies and other modifications with whole school populations can be considered.

Parents will be integrated as partners in the supports provided to special education students, from their informed consent and participation in training when students are recommended for evaluation to consistent progress monitoring of students. In addition to participation in IEP meetings and frequent conferencing to brainstorm support strategies that can be integrated at school and at home, parents will be invited to participate in information sessions hosted by the Student Services Director, and informed of due process procedures and rights.

FCS will provide support services as needed, including a clearly outlined referral process that will be reviewed with staff at the start of each year, and throughout the year as necessary. FCS staff will be empowered to act as advocates for their student.

### **Student Performance Standards**

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

The top priority of the Board, staff and faculty of Francis Classical School (FCS) is to ensure that school goals are met while maintaining compliance with all applicable laws, policies and mandates. The goals outlined previously will drive all means employed in the school on a daily basis. The goals are rigorous and set high standards for student achievement, governance and operations. Thorough and consistent monitoring reports based on state and school mandated assessments will provide administration and the Board 1) assurances of progress toward goal accomplishment and 2) proof that goals have been met according to the timelines established.

Student performance standards include:

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

1) Students will meet or exceed grade level standards in accordance with NC State Board of Education mandates.

Measure after years 1 and 2: 70% of students.

Measure after years 3 and 4: 85% of students.

Measure after year 5: 90% of students.

Measure after year three: Percentage of students, by subgroup (low income, special education, ELL, etc.) who earn a passing score on the EOC or EOG tests will exceed that of the local district/state average, whichever is higher.

2) During each year of the charter term, FCS students will demonstrate increased annual growth over the course of their tenure at the school.

Measure after year 1 and beyond:

Of students who are one year or more behind in reading at least 75% will make 1.5 year gains in reading in a school year.

Measure after year 2 and beyond:

The percentage of students who meet or exceed their annual growth target on the MAP will meet or exceed that of the local district/state average, whichever is higher.

3) FCS will graduate students from high school.

Measure by year 5: 95% will graduate.

In addition to state mandated tests, FCS will use additional assessments, such as:

MAP:

Students will take the MAP three times a year in grades 3-8 in reading, language arts and math, a computer-adaptive assessment that provides students with questions based on their prior answers, ensuring about half of the questions each student faces will be answered correctly and half incorrectly. MAP provides detailed information for students, parents, and teachers on the specific strands students need to develop and the names of students who could be grouped together based on common content sub-strand needs. The data will be used to measure individual student growth, as well as growth of students by sub-group, teacher, and grade level to inform professional development and school-wide structures.

Core Knowledge Sequence Assessments:

The assessments will be taken at year end in grades K-8 for History, Geography, English/Literature, Science, Music, and Art to measure knowledge of specific content taught throughout the year. Students will also take teacher prepared tests throughout the school year. Teachers will use the information gleaned from these assessments and tests to determine which material needs to be reviewed and/or how instruction could be modified to address identified gaps in knowledge.

Riggs Assessments:

Riggs Reading provides for the use of McCall-Crabbs Standard Tests, given each week. These tests are designed to be given in a short amount of time and can be scored quickly. They can be used for assessing comprehension as

well as fluency in grades K-12. The nature of Riggs is that it can be used as an intervention tool at all grade levels with all learning styles, reinforcing concepts or re-teaching if necessary. Where students are missing basic skills, Riggs provides assessments for discovering those gaps and creates strategies for remediation that can be utilized at all grade levels.

#### Singapore Math Assessments:

Singapore Math ensures students are exposed to a manageable curriculum with coherent, cumulative and specific focus that allows for mastery before introducing new materials. This model of mastery learning bears significant resemblance to the Response to Intervention model; the use of diagnostic assessments to assess current knowledge, high quality, group-based instruction, parallel formative assessments of corrective action, and enrichment or extension activities as appropriate.

#### Promotion for K-6 Students, including special needs:

The primary goal at the elementary levels is solid literacy. A child cannot go on to more complex studies if he or she does not have adequate reading skills.

A student may pass to the next grade if he reads just above grade level. For example, first graders must read at a minimum of a 2.0 instructional level to pass to second grade; second graders must read at a minimum of a 3.0 instructional level to pass to third grade; third graders must read at a minimum of a 4.0 instructional level to pass to fourth grade (2.0 means 2nd year, 0 months.)

In addition, students in grades K-2 must achieve mastery of the phonograms at the following minimum levels:

Kindergarten: 50% of phonograms taught at the kindergarten level.

First grade: 80% of phonograms taught at the first grade level.

Second grade: 100% of phonograms taught at the second grade level.

Kindergarten: must demonstrate the ability to decode and read the open and closed syllable words learned during the year.

First grade: must be spelling at least on grade level using the Riggs Orthography Scale.

Difficulties or weaknesses in reading development will be identified through our assessments and instructional supports and services provided as needed so that students can meet promotion standards.

In addition to literacy, K-6 students must have attained competence in all the core subjects over the course of the year and attained at least a C average. Competence is attained by not only knowing the material but by completing assigned work. Completion of work requirements demonstrates not only the ability of the student in the various subjects but also the mastery of study skills necessary for academic and personal achievement. Students whose grades or skills fall below the requirements of their grade level will be retained. Borderline cases will be decided by the teacher and the Principal.

#### Promotion Grades 7-12 including special needs:

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

A student must attain a 1.7 GPA in core courses (English, history, math, science) to pass to the next grade level. Students who make a C in a single class may re-take the class with the approval of the Principal. A D in a single class may be a passing grade and may be awarded credit at the discretion of the teacher and Principal. Failing a core course will require the student to re-take the class.

Promotion criteria will be provided in the school handbook that is available on the FCS website.

### **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.*

The role of discipline at FCS is to uphold the school's mission by creating an environment where teaching and learning take place productively. The good behavior of students in school promotes their education. Respect will be given to teachers and students, and to all institutional and private property, so that all members of the community will be allowed to pursue learning without distraction. Students are expected to adhere to the general rules of the school, and rules each teacher establishes in the classroom.

FCS will set standards of decorum, behavior and attitude that enhance the learning atmosphere and prepare children for life in civil society. Basic expectations for appearance will include wearing a uniform to promote a sense of orderliness and community. The culture of order and mutual respect are critical to educating virtuous and informed citizens and achieving the school's mission. The Board believes civil behavior is learned and needs to be continually taught, modeled and practiced in order for virtues to become part of a student's character and help develop his or her own sense of responsibility in a self-governed society.

The lower grades will be guided in 8 Pillars of Character: respect, responsibility, industry, integrity, honesty, courage, cooperation and citizenship. Teachers and staff will be expected to model these core principles in all behaviors. These core principles will provide our students, including those from chaotic households and those coming to us grade levels behind, with the opportunity for self-improvement, individual growth and character development which are all necessary for a successful learning community. Students will receive progress reports that include not only academic progress, but progress reflective of their adherence to these

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

principles. Four classical virtues - temperance, fortitude, justice, prudence - will be introduced in high school to extend the standard of excellence represented in the 8 Pillars of Character. Students should thrive in an environment committed to teach right from wrong, justice, and the importance of serving others. Discipline problems should be minimized in this environment.

The Principal may suspend any student for up to 10 school days when a student willfully engages in conduct that violates the Student Code of Conduct. The Principal will provide the student an opportunity for an informal hearing before imposing a short-term suspension unless the student creates an immediate threat to the safety of others. If so, then the hearing shall be offered as soon as practical. The Principal will give notice to the student's parents by the end of the workday on which the suspension is made when reasonably possible.

The Principal may recommend to the Superintendent a suspension of more than 10 days. The student will have an opportunity for a hearing. If the student declines a hearing the Superintendent will make a decision based on policy. If a hearing is desired, the student or parent must notify the Principal in writing within four school days of receiving the notice. The hearing by a panel appointed by the Superintendent will be held and a decision issued before a long-term suspension is imposed. Student and parent will be given reasonable notice of the hearing and notified of due process rights as written in the handbook. After the hearing the Superintendent will make a decision. The student may appeal to the Board.

The Board may, upon Superintendent recommendation, expel a student under state law guidelines. Notice and a hearing opportunity will mirror long-term suspensions. If expelled the student will be given notice of right to petition for readmission.

If a student has a disability, then relevant provisions of the IDEA or Section 504 will govern any proposed suspensions or exclusions from school. The student handbook will provide policies and procedures including Code of Conduct, due process rights and grievance procedures.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
The evidence is there from other districts on how the programs will work. More information is needed on how the programs will be implemented at the school. What assessments will be used other than teacher made test and end of year assessments? How will the school use data.	Shannon Sellers	Instructiona
The application provides evidence regarding successes of the proposed approach in other markets. Additional information should be gathered regarding how data will be used within the proposed approaches and how success will be measured. Simply listing strategies is not sufficient.	Greg Schermbeck	Instructiona
more info needed about assessments, how approaches will work together, ways in which these approaches will be used, curriculum, etc. no evidence cited	Amy Ruck Kagan	Instructiona
The framework is very broad for elementary and middle only focusing on history. This needs to be more comprehensive. The calendar clearly shows student days. What about professional development days?	Shannon Sellers	Curriculum a
Curriculum Outline is attached and fairly detailed. More information should be included that states the related objectives for each unit. Core Content - The attached document lists example content for 9-12, however the school is serving grades K-8 in its opening year. Therefore, additional information should be provided regarding specific content that will be offered in the founding year. Instructional Calendar should highlight teacher PD days and what will be covered within those days.	Greg Schermbeck	Curriculum a
What assessments will be used to determine student placement? Are you planning to use the state assessments for entrance into ELL or your own assessment? A Special Ed teacher should only be involved in ELL placement if the ELL student has a learning disability.	Shannon Sellers	Special Prog
data and evidence still needed need alternatives to the proposed curricula examples of assessment and diagnostic tools further detail on the data used for RTI examples of ELL assessments	Amy Ruck Kagan	Special Prog
There is minimal mention of using diagnostic exams to identify all learners and of how data will be used to differentiate instruction for students. Additional information should also be gathered regarding how small group or pull out instruction will increase students learning. Particularly those performing below grade level.  There is a strong plan in place to work with ELLs. More questions should be asked regarding the specifics of the planned program.  A clear plan is not in place to enhance the academic opportunities for gifted students. The application states that differentiated instruction and student grouping will be utilized, however outside of identifying gifted students, no clear plan is described.	Greg Schermbeck	Special Prog
Clear process and steps are outlined. School should be encouraged to utilize data more frequently to better gauge progress.	Greg Schermbeck	Exceptional
What is the process if a parent makes a referral for evaluations? Who will determined if a student should be evaluated or not? This portion is out of compliance in regards to determining eligibility.	Leigh MObley	Exceptional
Is the student services staff highly qualified to provide specially designed instruction? What is the process if a parent makes a referral for evaluations? Is there an Exceptional Children's teacher?	Leigh MObley	Exceptional
who comprises the SS team?	Amy Ruck Kagan	Exceptional
A clear process and framework are in place. Again, the school should be encouraged to use data more frequently. Once a semester is not sufficient.	Greg Schermbeck	Exceptional
Students with IEP's should receive progress reports throughout the semester, not just at the end.	Shannon Sellers	Exceptional
More specificity should be given to the performance standards. It appears a rough outline is provided however the school should continue to break down these goals in	Greg Schermbeck	Student Perf



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

order for each to be student and family friendly.  There is a clear list of evaluation assessments that will be utilized. It will be critical that the school leader and teachers properly use this data to drive instruction.  There is mention of policies and standards for promotion however more detailed is required. Statements are general and do not provide a clear process.		
describe grade level standards how are they measuring goals- growth for example? still unclear how assessment information is going to be utilized may retain a great deal of students base don reading levels	Amy Ruck Kagan	Student Perf
How will the data from these assessments be used to drive instruction? How will data be shared with the board?	Shannon Sellers	Student Perf
The draft student handbook is thorough however it is leveraged from the Kennedy Charter handbook. Questions should be posed regarding why the school wanted to use a similar frame and code of conduct as Kennedy. Specifically, since Kennedy has recorded low academic outcomes, how does FCS plan to differentiate their handbook and ensure their school is successful.  More information should also be provided regarding the student discipline policy. Outside of the character traits listed, minimal information is provided within the application. The handbook does explain different levels of discipline for a variety of student acts yet there is no specificity to how the levels of discipline will be decided. There is also no mention of a students conduct program that reinforces positive behavior and holds students accountable through clear steps in the discipline process.	Greg Schermbeck	Student Cond
wide berth for ten day suspension unclear about infractions unclear about special education or other at risk students how will the 8 pillars be taught or reflected in school environment	Amy Ruck Kagan	Student Cond
What is the discipline procedures for students with disabilities, including manifestation determination review, change in placement and provision of services? Discipline procedural safeguards for students with disabilities are not in the handbook.	Leigh MObley	Student Cond

Reviewer	Score
Amy Ruck Kagan	Pass
Leigh MObley	Fail
Cheryl Turner	
Helen Nance	
Tracy Kelley	Pass
Alan Hawkes	
Steven Walker	
Shannon Sellers	Pass
Becky Taylor	
Greg Schermbeck	Pass
Alex Quigley	

**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:* Francis Classical School

*Mailing Address:* 617 N. Summit Avenue

*City/State/Zip:* Charlotte NC 28216

*Street Address:* 617 N. Summit Avenue

*Phone:* 704-369-2505

*Fax:* 704-688-2960

*Name of registered agent and address:* Dr. Frederick G. Grosse  
617 N. Summit Avenue  
Charlotte, Mecklenburg County, North Carolina 28216

*FEDERAL TAX ID:* 47-1922427

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

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

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

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

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

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

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

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

Lisa Bartholomew Haislip		MECKLENBURG	Sole Proprietor , Credit Research Services		
James Emerson Humphrey		MECKLENBURG	Interim Pastor		
Michael Arthur Stewart		MECKLENBURG	Retired from Wells Fargo		
Rondell Gaddist	Secretary	MECKLENBURG	VP, BB&T		
Peter Weems Estelle		MECKLENBURG	EVP, Willis Charlotte Office		
Frank Bradley Gilliam	Vice Chairperson	MECKLENBURG	Owner, BrandRPM LLC		
Margaret Jane Parrish	Chairperson	MECKLENBURG	Retired HR and Retail Executive		

**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.*

The School Board of Francis Classical School will be comprised of members of the Board of Governors of Elon Homes and Schools for Children, Inc. (EHSC), a NC nonprofit corporation which has been in existence since 1907. (Since 1998 the EHSC Board has functioned as the School Board for Kennedy Charter Public School. In this position the Board has many years of experience functioning as a duly authorized School Board. During this time the Kennedy School Board has met with numerous officials from the State Board of Education and NC Department of Public Instruction and become a trained and effective board.)

The FCS Board will meet as an authorized School Board and will follow all applicable laws and regulatory standards as set forth by charter school law and the State Board of Education. The School Board has been trained by and is represented by attorney Donna Rascoe. Board members are required to attend Policy Governance training which is the Board's model of governance ([www.policygovernance.org](http://www.policygovernance.org)).

The Board's primary responsibility, as detailed in the Board's policies, is to ensure appropriate school performance and fulfillment of the school's mission. The Board will create and maintain: the link between stakeholders and the school; written governing policies in compliance with the charter to include mission, constraints on executive authority, governance process, and Board-Superintendent linkage; assurance of successful Superintendent performance; and in accordance with charter requirements, the Board will

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

approve various operational means including the curriculum, annual school budget and annual audit. The Board will also hire and dismiss teachers.

The FCS Board will meet monthly and will expect monthly monitoring reports from school administration on all aspects of the school performance toward fulfillment of the mission. In addition to academic performance and progress toward all school goals, monitoring reports will include the following: interaction with students and families; treatment of staff; financial planning/budgeting; financial conditions and activities; asset protection; and compensation and benefits. The Board will review the monitoring reports and vote to approve/disapprove at the meeting.

The President of EHSC serves as Superintendent of FCS. The Superintendent will work for the FCS School Board and will be responsible for the operations of the school and for employing and supporting the academic leader for the school. At no time will there be less than two EHSC employees who could step in as Interim Superintendent in the instance that the services of the current Superintendent were unavailable. If a permanent replacement is needed, the EHSC Board would prepare a job description for an ad-hoc Search Committee that identifies products the Committee must achieve, authority of the Committee including budget, and timeline. The job description of the Superintendent would be reviewed and finalized. The Board would elect the Search Committee to identify qualified candidates, adhering to all applicable laws, prudent and ethical business practices, and industry standards. Likely means of identifying candidates include extensive advertising, leveraging relationships throughout the region and U.S., and an appropriate search firm. Following the policies outlined in the EHSC and FCS Board manuals as well as the employee manuals, final candidates would be interviewed (phone and in person) and a replacement selected, pending proper background checks. Supervision of the Superintendent is described in detail in the Board manuals in the Board-Superintendent Linkage Policies. In summary, the Board will instruct the Superintendent through written policies which prescribe the Mission to be achieved, and describe organizational situations and actions to be avoided to meet the mission. Monitoring of performance will be solely against these stated criteria.

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 will effectively lead the school toward excellence in performance while complying with all laws and regulations having oversight of a NC charter public school. The bylaws call for the School Board to consist of 5-15 members. The primary duty of the School Board is to achieve the school's mission and fulfill the requirements of the school's charter. The School Board has a Chairperson, Vice Chairperson and Secretary. Every board meeting is to be attended by every School Board member and accurate minutes are to be taken, approved and made available to the public.

The School Board represents the community it serves. As a Policy Governance structured Board, top priority is not finding Board members that reflect a specific constituency or demographic of the community, but instead, each Board member is expected to become knowledgeable enough to appropriately

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

represent all constituencies and demographics of the community it serves, drawing upon whatever resources are necessary to accomplish this job. Still, we expect the Board composition to reasonably reflect the community.

The skills and expertise we seek in Board members include: the ability to see the 'big picture of governance' and not the 'lesser picture of micromanagement'; the ability to focus on the future in a way that is visionary yet practical; commitment to inclusive and fair process; comfort with the diversity among stakeholders and their varying opinions and values; comfort with accepting responsibility and the the shared authority it imposes; respect for the authority of others; acceptance of a role that carries no individual authority; ability to participate assertively in group process; ability to accept and not undermine a group decision legitimately made; time available to participate fully in preparation and in actual Board work; capacity for conceptual flexibility and for addressing high-level issues in a disciplined process; ability to uphold group rules and to follow those rules with respect to relationships with staff and others; and willingness to play a role in making judgments about the performance of the Superintendent, but only in relation to preexisting criteria.

To fulfill its responsibilities and ensure the school's success the Board dedicates time to the following: linking with stakeholders, including parents and teachers, through various means including surveys, panel discussions and meetings with stakeholders; learning about the education and skills that young people need in order to be productive and responsible citizens in their communities; learning about effective and rigorous curriculum and instructional practices so informed decisions can be made when voting on the curriculum; connecting with other charter school boards and ongoing training about School Board responsibilities, testing/assessments and understanding data; participating in training about its own responsibilities including fiduciary and legal responsibilities as well as adherence to the Policy Governance model which has a rich history of excellence in governance. Through the process of following its own policies the Board determined that adherence to the classical school tenets would ensure all State Standards would be met.

To verify that the school is an educational and operational success and meeting the mission, school monitoring includes performance standards, data from test scores, formal assessments plus monitoring policies outlined in the Board Policy Manual. The School Board will evaluate the performance of the school, and thus equally that of the Superintendent, based upon the accomplishment of stated goals. All meetings are held in conformity with the NC Open Meeting Laws so any parent or other stakeholder has immediate access to the full School Board at any meeting. On at least one occasion per year the School Board will distribute surveys to the parents to gauge satisfaction and responsible feedback about school educational and operational issues.

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

The founding members of the FCS School Board are drawn from the members of the Board of Governors of Elon Homes and Schools for Children, Inc. (EHSC) and are in place and functioning as reflected in FCS Bylaws. After careful study, research and reflection the EHSC Board resolved to apply for this

second NC charter public school in Mecklenburg County as a benefit to the children and families of our community and as continuing outreach of our organization. The Board adheres to the philosophical belief that a K-12 school functions best with no more than approximately 750 students. This allows teachers and students to know each other in a safe, nurturing environment that is financially viable. The EHSC Board has been functioning as the Kennedy Charter Public School's School Board since 1998 so it has extensive experience as a NC charter school board. Membership on the Board shall not be restricted on the basis of sex, age, race, national origin, religion or physical disability. The Nominating Committee will guide the process of identifying, recruiting, and proposing board members, and guide the orientation process.

Open positions of the Board are filled by a detailed process of recruitment and training. Any person who will be nominated for service on the Board will typically be identified at least one calendar year before the actual term of service. During this time, the Nominating Committee can properly orient the person to the mission, procedures and protocols of the Board and the school. Prior to Board service, a candidate must read the School Board Policy Manual, attend at least one School Board meeting, interview with the Superintendent and at least two School Board members, take a lengthy visit to the school itself, view a sampling of the videos on the Barney Charter School Initiative website that provide detailed information about classical education including sample lessons provided by Hillsdale professors, and attend the mandatory Policy Governance training with Miriam and John Carver in Atlanta (offered fall and spring). In this process we have built "go" or "no go" points along the way, meaning a candidate or Nominating Committee may indicate this is perhaps not a good match. All Board members are expected to suggest individuals to add to the candidate pool. Candidates should have the skills and aptitudes listed above and a strong interest in quality, classical education and the FCS mission.

Any vacancy occurring on the Board may be filled by a majority vote of the Board. Persons elected to fill a vacancy in office of Director shall serve for the unexpired period of the term of the seat so filled, and Directors elected other than at the annual meeting shall take office immediately upon election. If the total number of duly elected and qualified Directors falls below the number necessary for a quorum, the remaining Directors, however reduced in number, shall have authority to fill vacancies in the Board. The term of the Directors shall be 3 years and shall be apportioned insofar as practicable so that one-third of the Directors shall be elected each year. No Director shall be elected to serve more than two successive terms, but shall be eligible to serve again after remaining out of office for one year. Any amendment to this provision shall not apply to reduce the unexpired portion of any term at the time of amendment.

Every person's nomination to election for Board service is conditional upon a formal background check for both criminal convictions and child welfare violation convictions. No person may serve on the Board or any committee of the Board if he/she has a misdemeanor criminal conviction related to financial matters or violence, any criminal conviction or a formal listing on the state or national registry for sex offenders or violence/abuse against children.

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

*the bylaws established.*

The board will meet at least once a month. Special meetings may be called by or at the request of any two Directors. The annual meeting will typically in held in April to elect Directors and Officers and transact business properly brought before the board.

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

It will be the responsibility of a Nominating Committee to meet this standard by:

- 1) Identifying, recruiting, and proposing board members;
- 2) Guiding the orientation process;
- 3) Guiding ongoing training and professional development.

The Board chair will appoint a Nominating Committee and chair. The Superintendent will serve on the Committee and provide administrative support. All committee members should be skilled as board members, have extensive connections in the community, and be able to make fair, impartial judgments. A non-board member from the community may be appointed if desired. The committee will develop a written plan of action with activities and timelines that is prepared in advance of the first Board meeting of the school year. The plan will likely include the following:

- 1) Ensure that committee functions are in compliance with By-Laws.
- 2) Review the recruitment and job description policies.
- 3) Identify and continuously add to a pool of prospective board members, utilizing the input of other board members.
- 4) Cultivate the interest of prospective board members.
- 5) Screen and meet with candidates.
- 6) Recommend candidates to the full board for a vote.
- 7) Inform, orient and involve new board members.
- 8) Nominate officers.
- 9) Ensure continuing education plan.

This Committee will work in conjunction with the Superintendent and school attorney to address orientation, annual training needs and calendar. New Board members must complete the requirements listed in the section above prior to serving on the Board. Board members are expected to attend all scheduled meetings and deemed to have resigned after two unexcused absences during the year.

Summer - Voluntary, encouraged, attendance at the annual Barney Charter School Initiative Summer Seminar at Hillsdale College. One board meeting will offer an overview of a Classical School provided by Barney Charter School Initiative faculty when they are in Charlotte to train teachers.

At each meeting - Through performance data presentation by school leaders, Board members will deepen their knowledge of testing and interpretation of data. Board members will receive updates/requirements from Office of Charter Schools to deepen their understanding of all aspects of charter school law and regulations; and receive relevant legislative updates. The timing of these two issues will be determined by need. The Board will monitor and

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

discuss the Board's process and performance at the end of the meeting. Self-monitoring will include comparison of Board activity and discipline to its own policies.

August meeting - The school attorney shall conduct an annual orientation and training for the School Board on ALL aspects of operations and responsibilities of a School Board member. There will be a review of the Board Manual which includes policies, Charter law, and the Charter itself.

September meeting - review of the book *The Making of Americans* by E. D. Hirsch, Jr.

October meeting - Review of the book *Cultural Literacy* by E. D. Hirsch, Jr.

January meeting - The Board will participate in a Policy Governance rehearsal.

February meeting - Review of the book *Why Johnny Can't Tell Right from Wrong* by William Kilpatrick.

During the year - Board members are encouraged to access online training opportunities at the Hillsdale College and Barney Charter School Initiative website. These include sessions from the classical education Summer Seminars offered at Hillsdale, and the courses taught by Hillsdale faculty in topics such as *The Constitution 101 and 201*, *History 101 and 201*, *Economics 101*, the *Great Books*. At least two visits will be scheduled to other classical charter schools and one visit with another board.

When available - Office of Charter Schools trainings; voluntary, but encouraged, participation in conferences and workshops offered by groups such as the NC Alliance for Charter Public Schools.

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

The School Board will follow its Conflict of Interest Policy which mirrors the policy from the Charter School Financial Guide pages B-4, B-5 and B-6 entitled *Conflicts of Interest Policy*. This policy exists to protect the school's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Corporation. This policy is intended to supplement but not replace any applicable state laws governing conflicts of interest applicable to nonprofit and charitable corporations. The policy defines the "interested person" and "financial interest," and also provides procedures to follow for duty to disclose, determining whether a conflict of interest exists, procedures for addressing the conflict of interest and violations of the conflict of interest policy. Annually Board members will sign a statement to confirm that he or she received the conflict of interest policy; has read and understands the policy; has agreed to comply with the policy; and understands that Francis Classical School is a charitable organization and that in order to maintain its federal tax exemption it must



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

engage primarily in activities which accomplish one or more of its tax-exempt purposes.

We do not know of any existing relationships that could pose actual or perceived conflicts if the application is approved.

In addition, the Board commits itself and its members to ethical, businesslike, and lawful conduct, including proper use of authority and appropriate decorum when acting as Board members. Further,

1. Members must have loyalty to the school, not be conflicted by loyalties to staff, other organizations, and any personal interest as a consumer.

2. Board members will not use their Board position to obtain employment in the organization for themselves, family members, or close associates. Should a Board member apply for employment, he or she must first resign from the Board.

3. Board members may not attempt to exercise individual authority over the organization.

4. Members' interaction with the Superintendent or with faculty/staff must recognize the lack of authority vested in individuals except when explicitly Board authorized.

5. Members will respect the confidentiality appropriate to issues of a sensitive nature.

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

The Board will direct, control and inspire the school through the careful establishment and use of written policies reflecting the Board's values and perspectives. Francis Classical School (FCS) will primarily model its Board policies from the Elon Homes and Schools for Children (EHSC) policies. These policies have been developed with the assistance and approval of school attorney Donna Rascoe and are included in the Board Manual which details the technical and legal requirements by which the School Board will operate. The Board will enforce upon itself whatever discipline is needed to govern with excellence. Discipline will apply to matters such as attendance, preparation for meetings, policymaking principles, respect of roles, and ensuring the continuance of governance capability. Although the Board can change its governance process policies, it will observe them scrupulously while in force. Should a member of the School Board, the Superintendent, the school attorney, or other stakeholder feel a policy revision or new policy should be considered, for any reason, including changes in the law, the following procedure should be followed:

1. Send written suggested policy change to the Chairperson with a copy to the Superintendent.

2. The Chairperson will add this to an upcoming Board agenda for discussion. The Superintendent may be asked to gather reasonable resources or information for use in Board deliberation.

3. Members will be properly prepared for Board deliberations and deliberate with an eye to the mission, utilizing the skills and expertise outlined above in Section 2. Pending results of the full Board discussion, the policy draft will be crafted by the Board into a final policy.

4. The final policy will be considered for a vote at an upcoming Board

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

meeting. Members will support the legitimacy and authority of the final determination of the Board on any matter, without regard to the member's personal position on the issue.

The Superintendent will ensure that any additions, deletions or changes to Board policies are communicated as needed and reflected when necessary in Employee Manuals and Student Handbooks.

FCS will also use the KCPS template for the initial employee and student policies, customized for FCS and aligned with the Board policies. These policies will be reflected in the Employee Manual and Student Handbook drafts. FCS will glean, with permission, from other classical charter school student handbooks, with which FCS feels a philosophical alignment. The staff responsibility for finalizing and properly maintaining the school employee and student policies will shift to the Principal once he or she is hired.

Existing policies were developed using resources and guidance from the Office of Charter Schools and the Department of Public Instruction and are in compliance with all laws, as well as professional ethics and practices commonly accepted in schools. Policies are, and will be on an ongoing basis, reviewed at least annually by the school attorney.

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

Francis Classical School (FCS) has an Advisory Committee consisting of members of the community who have an interest in the charter approval, founding, and success of the school. School Board members may serve on the FCS Advisory Committee, but only as a volunteer, not as a governing Board member. The role of the Committee is relationship building, student/family recruitment, support of the leadership and faculty of the school, and eventually will have a fundraising component. The Committee currently advises and helps the school leadership carry out the Board directives in applying and founding the school. The Committee provides periodic reports to the School Board and when the Principal is hired will work directly with him or her (assuming the Principal still has a need for this committee). For now, the Superintendent and designees provide support for the Advisory Committee.

The school also intends to form a Parents Association to promote friendly relationships among parents, acquaint them with the spirit and culture of FCS, secure their cooperation with the school's goals for the development of their children and to initiate the parents' involvement in, and support for, projects and functions that aid the school academically, socially and financially. The Parents Association will provide reports to the Board and once the Principal is hired work directly with him or her.

The Principal may establish any advisory bodies that would be helpful to him or her. These bodies would have no formal authority and no role in evaluating, on a formal or informal basis, the Principal or any other staff or faculty member.

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

Francis Classical School (FCS) will have a well-defined grievance policy

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

both for students and parents and also an employee grievance policy for staff members of the school.

A grievance is any situation that occurs within the school which causes a student, parent or guardian to believe that the student has been wronged because of a violation, misapplication or misinterpretation of a specific policy, rule or law. Students and parents should attempt to discuss concerns informally with the other persons involved before invoking the grievance procedure.

At Level I, a student, parent or guardian may invoke the grievance procedure by making a written request for a conference with the Principal. A written request for a conference should be submitted within ten days after disclosure of the facts giving rise to the grievance. The Principal shall grant the conference within five school days following the request. The Principal will provide a written response to the grievance within five school days after the occurrence.

At Level II, the student, parent or guardian may appeal the Principal's decision in writing to the Superintendent. A written appeal must be submitted within five school days after receipt of the Principal's written response from Level I. The Superintendent will review the grievance within five school days after receipt of the appeal. The Superintendent will provide a written response to the grievance within ten school days after the Level II review.

If the grievance is not resolved at Level II, the student, parent or guardian may appeal the Superintendent's decision to the Board within ten school days after receipt of the Level II response. The Board will provide a final written decision within thirty days.

#### Employee Problem Resolution:

To strengthen work relationships, reduce employee dissatisfaction, facilitate problem solving and promote a positive work environment, FCS provides both formal and informal processes for employees to express dissatisfaction and resolve disputes before they develop into more serious issues. The process outlined below encourages employees to express their concerns and explore solutions.

If an employee has a question about the interpretation or application of a FCS policy, disagrees with a coworker or supervisor, feels that treatment of him or her has been unfair, or has an unresolved work-related problem, the employee may first present the concern in writing to his or her immediate supervisor within five days of the situation which gave rise to the problem or concern. The immediate supervisor will make every reasonable attempt to investigate the employee's complaint or concern and respond. If the employee is unsatisfied with his or her immediate supervisor's response or if the employee feels uncomfortable approaching his or her immediate supervisor about the problem or concern, the employee may present a written complaint to the supervisor of his or her immediate supervisor within five business days. This supervisor will make every reasonable attempt to provide that employee with a written response. If the employee is not satisfied with the answer of the next level of supervisor, the employee may make a final appeal to the Superintendent within five business days from the receipt of the last written decision. The Superintendent will make every

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

attempt to conduct a thorough review of the situation and will make every reasonable attempt to make a decision within a reasonable timeframe. Decisions by the Superintendent may be appealed to the Board.

FCS strictly prohibits any type of retaliation against any employee who takes advantage of the FCS Employee Resolution System.

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

#### Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix F)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).
3. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix H).
4. A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix I)
5. Copy of any board policies if adopted already (Appendix J).
6. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).

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

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

**X Not Applicable**

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

**X Not Applicable**

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

**X Not Applicable**

### Projected Staff:

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

LIST OF STAFF POSITIONS (All are full time):

Superintendent (paid through EHSC budget)

Principal

Assistant Principal

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Business Manager

Registrar

Administrative Assistant/Enrollment Coordinator

Administrative Assistant/Receptionist (1 in years 1-3; 2 in subsequent years)

Custodian

Kindergarten teacher (2)

First grade teacher (2)

Second grade teacher (2)

Third grade teacher (2)

Fourth grade teacher (2)

Fifth grade teacher (2)

Sixth grade teacher (2)

Student Services Director

Special Education teacher

Paraprofessional

Teacher's Aide (6)

PE teacher

Music teacher (2)

Art teacher (2)

Modern foreign language teacher (1 in first two years; 2 in subsequent years)

Literature teacher (1 in first year; 2 in years 2 and 3; 3 in subsequent years)

History teacher (1 in first two years; 2 in subsequent years)

Math teacher (1 in first 2 years; 2 in year 3; 3 in subsequent years)

Science teacher (1 in first year; 2 in years 2 and 3; 3 in subsequent years)

Latin teacher (2)

Humanities Generalist grades 7-12 (1 in year 4; 2 in subsequent years)

Dual roles with EHSC - Superintendent, Chief Operating Officer, Chief Financial Officer, VP of Institutional Advancement, Technology Specialist.

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

Include the following information for the proposed charter school:

#### RECRUITMENT:

FCS will conduct a national search to find excellent teachers trained in classical education, leveraging the national network of classical schools, classically-inspired post-secondary institutions and the relationship with Hillsdale College (Hillsdale has a highly-selective, classical teacher training program plus a targeted annual Job Fair), as well as organizations such as the American Classical League, Classical Association of the Middle West and South, and participation in the National Latin Teacher Recruitment Week.

Because the mission and approach of the school is unique, we expect many scholars who would not traditionally pursue teaching to express an interest, as has been the case with other classical schools.

We anticipate a well-structured protocol for recruitment and vetting based upon:

1) Review of printed materials including resume/CV; Statement of educational philosophy; cover letter tailored to position; transcripts and scores.

2) Phone interview.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

- 3) Mock teaching presentation.
- 4) In person interview with hiring panel.
- 5) Reference/background check.

#### RETENTION:

Active involvement in the FCS instructional program and rich challenges in a collegial atmosphere will be key to retaining teaching/subject matter masters. A comprehensive professional development plan will be instituted for the school year and in advance of the school year. Staff will work together to create and/or adjust scope and sequence for all courses and grades, devise assessments to measure instruction results and participate in team building. Frequent, regular observation by administrators and peers in each teacher's classroom will inform all PD initiatives. By empowering instructional staff to work collaboratively and learn from one another while developing their own capacity, the school will engender a collegial atmosphere wherein constant improvement and growth is the norm. Teacher satisfaction and support will be a primary objective.

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

The School Board of Francis Classical School is responsible for establishing policies for FCS employees. The Board employs the Superintendent to whom it delegates responsibility for the day-to-day administration of the school. The Board and Superintendent employ staff in accordance with the policies established and approved by the Board, and in accordance with NC law. Employees of FCS through the Principal are accountable to the Superintendent through whom all communications to the Board are channeled. The FCS Board follows the Policy Governance model ([www.policygovernance.com](http://www.policygovernance.com)). A grievance policy is available when needed to address any complaints and through which employees may interact with the Board. Board meetings are open to employees and we anticipate presentations from time to time by employees covering significant developments at the school.

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

Applicants are required to complete and sign an employment application. False or deliberately misleading or omitted information on an application is grounds for immediate discharge.

If the job applied for requires driving or potential driving for Francis Classical School, applicants will also be required to have a satisfactory driving record. In addition, FCS will conduct motor vehicle records checks on all incumbent employees whose position requires them to operate a FCS vehicle. Such employees must maintain a satisfactory driving record.

Any offer of employment is contingent upon, among other things, satisfactory completion of a criminal background check and drug screen. Offers of employment are conditioned on final approval of the Superintendent. For teachers only, the School Board makes all final decisions regarding hiring and discharge. NC Gen. Stat. 115C-238.29F(e)(1)

FCS will conduct thorough background checks on applicants for employment that include obtaining references, performing criminal background checks,

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

and performing driver's license checks, to the extent allowed by law under NC G.S. 115C-238.29F(e1) and 115C-332. A criminal records check may also be conducted on a selective, random or rotating basis for any current employee, annually rehired employee, or employee whose contract is scheduled for renewal.

FCS procedures will be set forth in the staff handbook to describe the behavior expected of all staff for successful teamwork. Failure to meet standards of performance or conduct, will result in disciplinary action by a supervisor. The action may include, but is not limited to, a counseling interview, a verbal warning, a formal written reprimand, probation, suspension, or termination of employment. The type of discipline given will depend on the nature and seriousness of the offense. Any situation regarding termination of employment will be brought before the board for a final decision.

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

Employee compensation is established prior to employment by written offer. Salaries are determined individually and are commensurate with an employee's qualifications/experience. Salary ranges for faculty and staff are based on the LEA salary schedule, according to years of teaching experience.

POSITION	MINIMUM	MAXIMUM
Principal	\$ 67,000	\$ 115,000
Assistant Principal	53,000	87,500
Teacher (Bachelor's)	35,400	62,245
Teacher (Bachelor's NBPTS)	39,700	69,700
Teacher (Master's)	39,000	69,400
Teacher (Master's NBPTS)	43,600	77,700
Teacher's Aide	19,000	30,000
Business Manager	35,600	52,500
Registrar	28,000	42,500
Administrative Assistant/Enrollment Coor.	28,000	42,500
Administrative Assistant/Receptionist	28,000	42,000
Custodian	35,000	50,000
Student Services Director	46,600	75,000
Special Education Teacher	38,000	65,000
Paraprofessional	35,000	62,000

FCS will provide benefits to staff members who meet required number of work hours for eligibility for specific programs. All employees will be covered by Workers Compensation insurance. FCS employees will participate in the NC State Employees Health Benefit plans and State Retirement plans. Employees may participate in the Dental, Life, and Disability plans with established companies currently contracted to provide benefits to EHSC.

FCS reserves the right to evaluate benefit plans with respect to school budgets and make changes if needed to maintain budget integrity and consistency with applicable employment laws.

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

If an employee has a question about interpretation or application of FCS policy, disagrees with a coworker or supervisor, feels that treatment of him or her has been unfair, or has an unresolved work-related problem, the

employee may present the concern in writing to his or her immediate supervisor within 5 days of the situation which gave rise to the problem or concern. The immediate supervisor will make every reasonable attempt to investigate the employee's concern and respond. If the employee is unsatisfied with his or her immediate supervisor's response or if the employee feels uncomfortable approaching his or her immediate supervisor about the problem or concern, the employee may present a written complaint to the supervisor of his or her immediate supervisor within 5 business days. This supervisor will make every reasonable attempt to provide the employee with a written response. If the employee is not satisfied with the answer of the next level supervisor, the employee may make a final appeal to the Superintendent within 5 business days from the receipt of the last written decision. The Superintendent will make every attempt to conduct a thorough review of the situation and will make every reasonable attempt to make a decision in a reasonable time. The Superintendent decision may be appealed to the Board. FCS prohibits any type of retaliation against any employee who takes advantage of the Employee Problem Resolution system.

Terminations will be treated in a confidential, professional manner. FCS will strive to ensure thorough, consistent and even-handed termination procedures. All employees are at will and FCS reserves the right to terminate at any time, with or without cause. FCS will normally conduct an exit interview on the day employment ends. The interviewer will explain terms of separation including COBRA insurance continuation and conversion rights and retirement benefits.

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

The President of Elon Homes and Schools for Children (EHSC) will serve as Superintendent of Francis Classical School. This salary is paid through the Elon Homes and Schools for Children budget.

Four positions within the parent company that will be available to assist within the school but are not in the school budget include the Chief Operating Officer, the VP for Institutional Advancement (largely fund development), the Chief Financial Officer, and the Technology Specialist. These positions are paid through the EHSC budget.

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

Francis Classical School will retain a Student Services Coordinator to oversee the SPED and ELL programs, one special education teacher and one paraprofessional (Based on current enrollment projections). These teachers will be appropriately licensed, will administer all services to eligible students as stated in the Instructional Program section and will ensure compliance with all state and federal guidelines. Additional staff to support a special education population and/or ELL population larger than that estimated by current statistics will be hired as needed.

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

**SUPERINTENDENT**

The Superintendent (paid through EHSC budget) is responsible for ensuring the overall success of the school's mission as outlined in the school charter and ensuring all applicable laws, mandates and requirements are appropriately met. The Superintendent should have a minimum of a Master's



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Degree.

#### PRINCIPAL

The Principal is responsible for implementing the mission of the school, maintaining the academic and financial integrity of the school, managing the school and faculty, and supervising the students. He or she must have a minimum of a Bachelor's Degree in a related field, teaching and administrative experience, the ability to speak and write clearly, a commitment to classical education and the ability to oversee a classically-based curriculum. The Principal will likely teach one advanced course.

#### ASSISTANT PRINCIPAL

The Assistant Principal is the authority in charge of student discipline, supervision of non-academic programs, facilities, college/career counseling and certain ancillary staff. He or she must have a minimum of a Bachelor's Degree in a relevant field, experience in a supervisory role, ability to mediate difficult situations, experience in working with students in sports or activities, knowledge of business practices and the ability to speak and write clearly.

#### BUSINESS MANAGER

He or she will ensure strict budget preparation and adherence, compliance with all Federal and State insurance and contractual obligations, adherence to all charter school law and funding requirements and accuracy in records and reporting. Minimum requirements include a Bachelor's Degree in a related field and relevant experience.

#### REGISTRAR

The Registrar will compile, process and maintain student records in a manner consistent with administrative, ethical, legal, and regulatory requirements; develop school schedule for students, classrooms and teachers; compile and submit report cards; coordinate and submit student count report; work with the Principal to evaluate transcripts for new students to determine appropriate and equivalent awarding of credits and grade placement; facilitate new student registration; maintain electronic school records and physical files including report card grades, immunization records, emergency card information. Minimum requirements include a Bachelor's degree and relevant experience.

#### ADMINISTRATIVE ASSISTANT/ENROLLMENT COORDINATOR

This position is responsible for enrolling each student and clerical duties. He or she will be the point person for all new families to FCS; manage the lottery for every grade; create and maintain class lists and schedule elementary and middle school classes. Minimum requirements include a high school diploma and relevant experience.

#### ADMINISTRATIVE ASSISTANT/RECEPTIONIST

The position provides clerical support including data entry and typing and greets visitors calling or visiting the school. Requirements include a high school diploma and relevant experience.

#### CUSTODIAN

Responsibilities include maintaining the facility in accordance with all applicable requirements. A high school diploma is required and relevant experience.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

#### TEACHER

Teachers are responsible for the education of their students. Teachers are expected to demonstrate high character and embrace the virtues of a democratic society. Teachers are accountable to the Principal. They are employed at will, and operate as professionals within the guidelines established by the School Charter and the School Board. They will provide instruction that is consistent with the Core Knowledge Sequence and the high school curriculum. Teachers are responsible for adherence to FCS mission and philosophy; have a depth of understanding in one or more academic disciplines if teaching upper grades and a breadth of understanding across the curriculum if teaching in the elementary school; command of the English language;

excellent teaching ability; ability to ensure classroom decorum and maintain good parental relations; and professionalism in all aspects of the job. Minimum job requirements include a Bachelor's Degree in a relevant field; demonstrated mastery of an academic discipline (upper grades and specialists); ability and willingness to teach the Core Knowledge Sequence or high school curriculum as defined in the charter; ability to speak and write clearly and effectively; and conviction in the values of a rigorous liberal arts education. Desirable characteristics include previous teaching experience or experience working with young people; a liberal arts education; experience with the Core Knowledge or higher liberal arts teaching; and experience in charter or independent schools. Care will be taken to maintain the required percentage of licensed teachers as mandated by law.

#### STUDENT SERVICES DIRECTOR

The Student Services Director works in conjunction with the Principal as the authority in charge of 1) ensuring the academic integrity of the school by overseeing the appropriateness of modifications and accommodations for students in specialized programming, 2) overseeing and education of students with IEPs and 504 Plans, and other individualized plans, and 4) managing the Student Services department to include the supervision and evaluation of Student Services staff. The Student Services Director should have a minimum of a Master's Degree in a relevant field or an equivalent combination of education and experience; a Bachelor's degree in a relevant and appropriate field as it pertains to student learning and development; familiar with special education laws and regulations regarding IDEA and Section 504; have a special education license; management and K-12 classroom experience; and the ability to adjust to the needs to the changing student population.

#### SPECIAL EDUCATION TEACHER

This teacher will be a member of the Student Services team and help implement a program that meets the individual needs of students and complies with all applicable standards and laws. He or she will be responsible for educating students, managing student behavior, evaluating student progress, maintaining professional communications, preparing and maintaining accurate and complete records and reports as required by law, state directives, school policy and administrative regulations. Minimum requirements include a Bachelor's Degree and current NC teaching licensure in this area.

#### PARAPROFESSIONAL

A paraprofessional will support the special populations as a member of the Student Services team. While not requiring a special education license this employee must have a Bachelor's Degree and mastery of Riggs to assist in

literacy remediation.

#### TEACHER'S AIDE

Teacher's Aides support the educational program in the classroom. They may teach at the direction of the classroom teacher or Principal, and report to the school's Assistant Principal. Teacher's Aides are expected to support and supplement the educational program in the classroom; work under the teacher's direction; research and gather resources needed for lesson units; appropriately teach the virtues; and work effectively as a team member to improve the students' education. Minimum requirements include a high school diploma; demonstrated competence in reading, writing and math. A desired characteristic is a Bachelor's degree.

#### HUMANITIES GENERALIST (4th year)

A generalist teacher with a broad and substantial liberal arts foundation in their education will teach where needed, primarily in grades 7-12. Minimum requirements include a Bachelor's Degree, strong background in the liberal arts, highly articulate, and good command of English.

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

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

The Principal and Assistant Principal will be responsible for insuring that qualified teachers with appropriate licensure are hired and quality professional development is implemented to achieve the school mission.

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.*

#### MENTORING

While a veteran teacher typically might mentor a new teacher, FCS will set protocol to approach mentoring differently. Veteran teachers are expected to mentor new teachers about particular topics such as classroom management, working collaboratively with families and colleagues, and effective pedagogy. New teachers, likely to be content masters with a classical education, will be mentors for veteran teachers in topics such as explicit phonics, classic children's literature and grammar instruction.

The Principal and Assistant Principal will mentor teachers, intensively in the early years as the curriculum is mastered and the culture of the school matures. Each teacher will develop a professional development plan, continually updated, in collaboration with the Principal (or designee). The plan will draw from the NC Professional Teaching Standards and include measurable (SMART) goals to improve professional skills. Development of the plan should begin with an assessment of the teacher's knowledge and early performance.

The Principal or designee will observe teachers at least 4 times annually and hold a post-conference within ten days of the observation. Additional assessment conferences will be held to reflect on the progress of each teacher in meeting goals established for professional growth. Observations and coaching might result in plan adjustments.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

## RETENTION

FCS has established a comprehensive plan to screen, interview and hire qualified individuals. Staff will be oriented and provided support for fulfilling responsibilities. An atmosphere of teamwork among competent professionals will contribute to a collegial workplace. Protocols for coaching and review will help to maintain the competent work atmosphere. Multiple opportunities for mutual feedback will be available so that everyone will be able to improve and contribute to school performance. In the rare instance where improvement is not possible proper discipline will be employed so that poor performance will not hinder student progress. Teachers will have adequate time for planning and instruction. Internal promotion will be fostered when possible from teacher aides, substitutes, volunteers and alumni.

## EVALUATIONS

All teachers observed under NCEES will receive the required annual orientation that includes copies of and/or links to the Rubric for Evaluation NC Teachers, SBE Policy TCP-C-04 and the schedule for completing all components of the evaluation process. Staff will be provided with expectations and requirements of school and school culture.

Teacher evaluations will include:

- Teaching effectiveness within mission and curriculum.
- Student outcomes including student growth value as calculated by the statewide growth model.
- Collegiality and professionalism.
- Parent and community interactions.
- Ethics.

## MONITORING

Performance will be monitored through the year with feedback provided to support continuous improvement. This includes:

- Progress toward PD goals.
- Benchmark testing.
- Class visits from Principal or designee.
- Parent survey at least once a year.

## LICENSURE

Care will be taken to maintain the required percentage of licensed teachers as mandated by law. FCS will provide assistance for teachers to meet licensure requirements established by DPI and SBE as appropriate. Teachers with or without certification must have an undergraduate major or minor or higher degree or expert status as demonstrated to the Principal and Board's satisfaction in the subject area they teach. Other professionals (i.e. special education) must hold the appropriate licensure or certifications for the services they provide.

Teachers of core subject areas will be licensed in those subjects as appropriate to meet Section 1119 of the No Child Left Behind Act and ESEA. Licensure will be monitored for compliance.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Administrators will conduct exit interviews with staff to make adjustments to work environment if needed.

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

The professional development (PD) of our teachers is of primary importance as student success and mission accomplishment at Francis Classical School is directly linked to the ability of teachers to provide excellent instruction. Through PD efforts, teachers will continue to master their academic disciplines and the skills necessary to provide a classical education.

Professional development will embody the following core components:

1. In addition to formal evaluation measures, professional development will include coaching.
2. Feedback will be embedded in practice, as administrators as well as teachers carry out informal classroom observations and job-embedded coaching sessions.
3. Professional development will include observations of effectiveness by the Principal.
4. Each teacher will have an individualized PD plan.
4. Uniform professional development will be utilized for core instruction in classical education fundamentals, rounded out by individual study and reading.

In summer of 2016, through the Barney Initiative, teachers will receive 10 days (3 in subsequent years) of professional development prior to the first day of school. Professors from Hillsdale College, or other professionals as designated by the Barney Initiative, will provide training in the foundations of a classical education and the key curriculum. Teachers will break into grade appropriate groups for Riggs training. Within the school year, these professionals will provide guidance as needed.

The Principal and other internal or external sources as appropriate will provide three additional days training in additional topics listed in the next section.

All K-8 core curriculum have extensive on-line resources to assist in effective teaching and testing, particularly through The Riggs Institute, Core Knowledge Foundation and Singapore Math. Excellent on-line resources are available on the Hillsdale College website, including classes highly relevant to teachers in a classical school.

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

The Principal will attend the summer Boot Camp sponsored and scheduled by the Barney Charter School Initiative.

As teachers are hired, they will be assigned relevant reading materials, such as books by E. D. Hirsch, *Climbing Parnassus* by Tracy Lee Simmons, *Left Back* by Diane Ravitch and others, as well as on-line resources such as those found at Hillsdale College. All teaching staff will arrive two and a half

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

weeks prior to opening day. These days will be packed with relevant professional development and information required for a successful year, including:

1. Through the Barney Charter School Initiative: Ten days training that will include foundations of classical education, Riggs, Singapore Math, Core Knowledge Sequence, grammar and composition, literature and other essential tenets of classical education, all which are challenging and crucial to meeting the school's mission.

2. Through internal and external sources:

- Lesson planning, classroom organization, and professional teams and mentor relationships.
- Special populations.
- Mandates required by law.
- Technology.
- Review of staff and student handbooks, policies, expectations and professional standards.
- Organized time for small group planning meetings.

Unique aspects of classical education, such as explicit phonics and content rich curriculum, can be challenging in the beginning. For example,

1) Riggs:

Teachers grades K-6 will teach Riggs and many will likely be unfamiliar with its Writing and Spelling Road to Reading and Thinking which is a neurolinguistic approach to cognitive development and English literacy. To learn this initially challenging but highly effective approach, teachers will be divided into two groups for instruction, K-3 and 4-6, since the needs and approaches are different. K-3 will focus on learning to teach explicit phonics to non-readers and early readers and the methodologies for doing so. The instructor will demonstrate how to teach handwriting and correct spelling patterns with user friendly teaching aids. For example, dotted-line paper and the numbers 2, 10, 8 and 4 on a clock face form eight reference points which are touched as letters are formed. Teachers will learn to teach the 71 phonograms in isolation without key words, pictures, capital letters or letter names with the help of student/teacher dialogue (in red print on actual cards) on the backs of the phonogram cards. This facilitates handwriting instruction. Teachers will learn to use direct Socratic instruction in dictation.

Teachers in grades 4-6 will learn to teach the basic methodologies of Riggs also but will focus on teaching the applicable rules necessary to learning to decode new words such as those found in science or literature.

Student Services faculty must know Riggs and learn best practices for literacy remediation and re-teaching as necessary among all the grades.

2) Core Knowledge:

The first year of teaching Core Knowledge (CK) is challenging with new topics to master and a year long plan to prepare. While the CK Sequence, grade specific handbook, and other CK materials including sample lesson plans, contain a wealth of knowledge about teaching the curriculum, teachers

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

will need additional resources and strategies for optimum teaching success. Teachers should: look for ways that special area teachers can enhance and connect with topics; involve local groups and individuals who can visit the classroom and share relevant knowledge; learn more about the ideas behind CK through E. D. Hirsch's writings; and continue to learn more about a subject to do a better job teaching it.

Teachers should work together to plan for the year, develop lessons and assessments, and discover resources. This can help ease the challenges and workload associated with the first year of implementing CK. Group planning sessions during the year will also lead to better classroom instruction as well as build a collegial atmosphere among the faculty.

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.

We expect to provide 13 days of professional development prior to the opening of the first school year (six days in subsequent years). Teachers will likely begin most of these days at 8 a.m. and end at 3 p.m., with a 45 minute lunch break. This will provide at least 60 hours of training prior to the first school year. Additionally, at least one staff meeting per month, usually after school, will be dedicated to professional development for 1-2 hours each. Teacher workdays when students are not in school will likely be used at least twice per year for additional professional development on topics that have arisen during the school year as needed. This will provide a minimum of six additional hours of professional development. Formal and informal meetings for coaching feedback, lesson planning and group planning meetings will take place primarily after school.

### **Enrollment and Marketing:**

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

### **Marketing Plan**

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

To market Francis Classical School (FCS) to prospective students and parents, the academic rigor and unique qualities of a classical education will be highlighted. Additionally, the effectiveness of such an education among a wide range of children from various ethnic and socioeconomic backgrounds will be demonstrated through evidence-based findings. While FCS is planned to be located so that it is conveniently accessed by lower income families, the school will market throughout the District to attract a student population that is geographically, culturally, ethnically, and socio-economically diverse.

The FCS Advisory Committee, chaired by a member of the School Board, has prepared a Marketing Plan, working with the Superintendent and designees. All marketing will clearly state that FCS is a proposed charter school that is pending approval.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Goals include:

Build and maintain for five years a rolling list of at least 1,000 names of prospective families.

Each year enroll number of students projected in charter application.

Establish collaboration with local entities that promote children's interests.

Educate prospective families about classical education.

Create informative and attractive collateral and online presence.

Generate a wait list by 2018-2019.

Summer 2014 - Summer 2015:

Advisory Committee meets monthly to monitor and adjust marketing plan as needed.

Create FCS logo.

Create website. Include such things as FCS charter application, the application process, information about classical education, curriculum, the story of the Francis family, board members.

Distribute second interest survey to prospective parents and others concerned about education in the community.

Connect with Bright Beginnings program and NC Pre-K Program which collectively serve more than 3,000 Mecklenburg County children.

Meet in small groups with interested community members.

Establish and maintain online presence via social media (i.e. Facebook).

Collateral created (flyers, brochures, sample curriculum, business cards, etc.).

Establish relationships with faith community, community organizations, civic clubs, neighborhood associations, preschools and child development centers, the Charlotte Museum of History, Freedom Foundation and others.

November 10 - Public forum for community and prospective families/students.

January - June 2015:

Submit press releases; seek guest column/op ed opportunities about classical education and impressive results in classical schools.

Host public forum for community and prospective families/students.

July 2015 - June 2016 (leading up to Open Enrollment and beyond)

Advisory Committee meets monthly. Monitor and adjust marketing as needed.

Invite community to a classical education seminar.

Seek opportunities to meet with neighborhood residents, city, county leaders.

Intensify efforts to promote the mission and the brand, including media opportunities, classical music station ads (sponsorships), Circe ads, Facebook ads and others as appropriate.

Order apparel, stickers, backpacks, (make available via an online bookstore) and display table covering with the logo.

Post student application on website and make printed copies available. Post and have available handbooks, updated brochures and other collateral material.

Participate in community and neighborhood events.

Hold occasional Q & A sessions via call-in forums.

Seek guest speaking opportunities at local clubs/organizations.

Hold monthly public forums for community and prospective families/students in various neighborhoods and at school when possible.

Share news as Principal and others are hired.

Closely monitor applications and adjust marketing as warranted.



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

Summer 2016

Ribbon cutting, open house for community and families to showcase the school and faculty.

2016-2017 School Year

Continue intense marketing plan and adjust as warranted.  
Periodic open houses replace community forums.

Subsequent years:

Continue marketing plan, while reducing costs as possible.

## **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.*

Francis Classical School will continue to partner with the community, engaging parents, community leaders, businesses, and other stakeholders in the process of operating a successful charter school.

The hub of communications efforts after approval will include the Advisory Committee as it expands to leverage the collective expertise of numerous people, including prospective parents, diverse professionals and a broad cross section of the community. Examples of ways Advisory Committee members may support the school in addition to their work on the Committee include volunteering at community forums, school events and Open Houses, offering consultation as requested in their areas of expertise, sharing critical information about FCS throughout the community and planning for potential fund development efforts. Each member brings his or her sphere of influence to the committee. We will ask members to communicate to their circle of friends and acquaintances and spread the word via ongoing grassroots efforts. Through these efforts and others we will build our mailing list and e-mail lists of citizens who are interested in the school for varying reasons.

We will solicit media opportunities as appropriate and invite the community and parents to educational events to learn more about the school.

The FCS website and Facebook page will be sources of information about all areas of school activity and progress toward opening as well as providing information about a classical school education in general including curriculum.

Parental support is essential to the success of classical education. Parents will be asked to create consistency in expectations at home, including, for example:

1. Frequent communication about school values, behavioral and academic expectations, and student responsibilities.
2. Parent participation and understanding of assessment scores, student progress, and appropriate academic goals.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

3. A commitment to ensuring students attend school promptly, consistently, and with the necessary materials and supplies.

The FCS rigorous academic program will also be supported by a well-regulated campus that fosters positive student/parent/teacher relationships as well as school/community relationships. Volunteers will play an integral role at FCS. Volunteers assisting in the classroom will receive thorough training and parents will be encouraged to volunteer in classrooms as appropriate and in many other capacities. This might include extracurricular sponsors, coaches, and office support. Volunteers will complete an informational form, go through the appropriate background check and procedures will ensure compliance with all applicable laws.

All parents of FCS students will be members of what shall be referred to as the Parents Association, which exists to promote friendly relationships among parents, to acquaint them with the spirit of FCS, to obtain their cooperation with its objectives for the development of their children and to initiate the parents' involvement in, and support for, projects and functions that aid the school academically, socially and financially. The roles of the FCS Parents Association could include:

1. Help the school communicate with parents.
2. Help the parents understand the fundamental premises upon which the school functions.
3. Help schedule, promote and host student and parent activities.
4. Help initiate fundraisers for extracurricular programming.
5. Welcome new parents into the association and convey the need for their continued involvement and support of the school.
6. Encourage pride in the children and the school.

FCS will support the organization by having a designated school representative available at all meetings as requested, providing space and support for meetings and initiatives, and leading parent trainings as needed. Year one will offer extraordinary volunteer opportunities as parents and others can help set up initial classrooms and build the school culture.

## **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.*

FCS proposes an open enrollment period lasting from the first Fri. of Jan. until the last Fri. in Feb., but in no case will the period be less than 30 consecutive days. The open enrollment will be publicized in various ways, including public information sessions and FCS website. Applications will be available at FCS, public forums and on the website. FCS will mail applications as requested by families.

Admission to FCS is open to any child who is qualified under NC law for admission to a public school. Enrolled students are guaranteed admission in subsequent years provided the appropriate grade is available. As part of the application process, FCS requests that parents/guardians of new students participate in a tour and information session with FCS administration to discuss the educational goals of the family and the school. The purpose is to help parents make an informed choice for their child.

To be eligible for admission, the student must provide a completed application. Applications request basic identifying information including grade level and a signature verifying that the information is correct and that the parents/guardians are choosing education at FCS for their child. Application forms must be submitted to the school by the annual deadline determined by the Board (last Fri. in Feb.).

FCS does not discriminate against any student on the basis of ethnicity, national origin, gender, or disability. Except as otherwise provided by law or the school's mission as set out in the charter, FCS shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, race, creed, gender, national origin, religion or ancestry.

If the number of applicants exceeds the school's enrollment cap by grade, a fair and open lottery process will be instituted for application selection:

1. The applicant pool will be sorted according to admissions preferences within each grade.
2. Applications will be sorted by a) children of the school's full time employees; b) children of the school's Board; and c) new student applicants. (In year 2, siblings of current students will be sorted ahead of new applicants.)
3. The school will reserve spaces for students in categories a) and b)(limited to 15% of total enrollment). Any remaining spaces will be allocated by holding a drawing of names in category c).
4. If multiple birth siblings apply for admission and a lottery is needed, one surname will be entered into the lottery for all the multiple birth siblings. If that surname is selected, all will be admitted.
5. The lottery date, time and location will be publicized and open for anyone to observe. Names are drawn one-by-one, and as each name is drawn, that student is placed in his/her respective grade level. After all grade levels have been filled, names that remain will be placed in drawing order on the FCS waiting list.

FCS will fill openings from the waiting list in order of category, or, if no names remain on the list, will continue to market, review applications and admit eligible students.

Admission decisions will be made by the above process on the date set by the

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

board. Parents/guardians will be notified by mail and phone of each child's admission status and have 10 calendar days after the postmarked date on the notification to reply for each child offered enrollment. If no response is returned within 5 days, FCS will make 3 attempts to contact the family before the 10 day deadline. If no form is returned by the 10 day deadline, the child's seat or waiting list order will be given to the next eligible candidate.

Should parents decide to withdraw their student from FCS once the enrollment process is complete (and/or after the student has attended), they may withdraw their student and transfer to his/her respective public school without penalty. Once withdrawal is complete, the next student from the waiting list will be invited to enroll to fill the vacant seat.

**PROJECTED ENROLLMENT**

**2016-17 through 2020-2021**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Charlotte-Mecklenburg Schools

LEA #2

LEA #3

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000	LEA 600	LEA 000	LEA 000
Kindergarten	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 01	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 02	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 03	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 04	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 05	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 06	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 07	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 08	54	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 09	0	0	0	54	0	0	54	0	0	54	0	0	54	0	0
Grade 10	0	0	0	0	0	0	54	0	0	54	0	0	54	0	0
Grade 11	0	0	0	0	0	0	0	0	0	54	0	0	54	0	0
Grade 12	0	0	0	0	0	0	0	0	0	0	0	0	54	0	0
	486			540			594			648			702		

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

Reviewer	Score
----------	-------

## **V. OPERATIONS**

### **Transportation Plan:**

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

Francis Classical School will develop a transportation plan so that transportation is not a barrier for any child who is enrolled in the school. We anticipate locating the school in an area that includes a significant population of lower income families so that an excellent, research proven educational alternative is available within a short traveling distance for students with limited means and opportunities.

We anticipate carpools as part of the transportation plan for FCS and school families. While some parents will likely organize their own carpool plans, FCS will coordinate a carpool program for families who are interested in a school-coordinated option. By accessing the addresses of families who wish to participate, central locations for pick-up and drop-off can be identified.

FCS expects many families will take advantage of the excellent Charlotte Authority Transit System (CATS) which makes public transportation in the Charlotte area accessible, affordable and convenient. To make this option even more accessible, FCS will offer passes at a subsidized cost for families wishing to access public transportation and needing financial assistance to do so.

FCS will also offer a bus alternative that will be provided through a contract with a local vendor. Based on the transportation needs identified by families and the student addresses, FCS will identify cluster stops for the bus service.

FCS will ensure that any transportation program is in compliance with all federal, state and local rules and regulations governing vehicle safety equipment, inspections and licensing.

### **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.*

Francis Classical School will provide healthy, appealing meals to all students for lunch every day during the traditional school year. The school's business manager will oversee the relationship with an appropriate vendor to provide and prepare meals according to all applicable regulations. The school's registrar will collect and submit the required forms for the lunch program to regulators as required. The school's registrar will also process Federal Eligibility Applications for free and reduced meals and file the claims for reimbursement. The registrar will manage all aspects of compliance with the Federal School Lunch Program, including oversight of student invoicing and payment for meals not funded through the program.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

The vendor selected through a public bidding process to offer food services will be chosen based on their experience providing food service for similar programs governed by similar regulations, cost of the services, and demonstrated capacity to provide healthy meals that are appealing to students. FCS will follow all federal, state, and local laws and regulations regarding school nutrition to meet the nutritional needs of students.

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

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

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

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$2,600.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$4,000.00
Property Insurance	\$250,000		\$1,200.00
Motor Vehicle Liability	\$1,000,000		\$350.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$475.00
Other	\$0		\$ .00
Total Cost			\$8,625.00

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

**Health and Safety Requirements:**

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

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

francisclassical2016                      09/26/2014

(Board Chair Signature)

(Date)

**Facility:**

*Note that the SBE may approve a charter school prior to the school's obtaining a facility; however,*



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

*students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.*

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

Francis Classical School desires a location that ensures accessibility for economically disadvantaged families and will also draw a diverse student population similar to CMS. Our needs survey indicated considerable interest in the Plaza Midwood/North Davidson (No Da) area of town. This area would most likely meet our goal as stated above. We will also look in West Charlotte (and other neighborhoods if opportunities are discovered). The steps the board will take include the following:

Fall 2014

Working with the Superintendent the board will determine early funding options and form an ad-hoc facilities committee of the Superintendent, board members and community members knowledgeable in this area to develop a plan and a timeline for finding an appropriate space and contingency spaces. The committee will meet regularly and consider 1) existing public school facility not in use; 2) existing non-public school facility not in use; and 3) existing non-school facility. The Barney Initiative will assist in finalizing our needs list for a facility. The committee will also consult with the School Planning Office to assess how this office can provide assistance as well as the NC Public Schools Facilities Guidelines. The full board will be updated regularly.

January - May 2015

Visit two schools that the Barney Initiative assists. Identify needed partners, such as commercial real estate, a school architect, potential funders, and others. Identify actual facilities and visit.

June 2015

Finalize a needs list that details the space requirements for classrooms, restrooms, public spaces, offices and all areas of the school, as well as the infrastructure needs and health and safety issues, based on the research gathered.

July - August 2015

Narrow down the facility choices based on school requirements (such as location, costs involved, timeline) and take final options to the full board. The board will then make a final decision and offer to buy/rent (whatever arrangement is made) and proceed.

September 2015

Professional services are arranged as needed and renovation/upfit work begins.

September 2015 - December 2015

Work progresses and Superintendent handles the day to day supervision. The Superintendent (or designee) will research vendors for furniture, desks,

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

supplies, technology and make decisions by calendar year end.

January 2016

Orders are placed with selected vendors. Ideally the school will be usable at this point for an open house and meetings.

February - April 2016

Work continues.

May 2016

Renovations are complete and the building is ready. A Certificate of Occupancy is issued.

May - June 2016

Equipment, furniture, books, supplies are moved in. Technology is finalized.

July 2016

Teachers, staff arrive for training and to set up and prepare for student arrival.

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

We anticipate growing into a 40,000 - 50,000 square foot facility. We are budgeting an average cost of \$10/sf (exclusive of operating costs) based on the lower end of commercial real estate rental rates in our target market areas.

**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.*

Elon Homes and Schools for Children (EHSC) operates Kennedy Charter Public School on the Johnson C. Smith University (JCSU) campus. The University has generously made the campus available in terms of offering lab space, gymnasium, and the Arts Factory. Francis Classical School would likely use space on the JCSU campus if the facility identified were not ready. The new STEM building on the JCSU campus will be open and functioning by 2016 which will free up other classroom space currently in use. The University charges EHSC \$20 a year for use of the campus. We do not anticipate paying any more than that for temporary space for FCS. We will work with the University this fall to develop an agreement for this contingency including classroom space and use of other school facilities such as that available to Kennedy Charter Public School. The JCSU location is easily accessible.

The facilities committee plan will include identifying additional locations as a back up, starting with a school building that is not in use.

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

check for transportation costs in budget	Amy Ruck Kagan	Transportati
How will district provide special transportation to students with disabilities if required per their IEP?	Leigh MObley	Transportati
FCS should expect to provide more transportation options outside of a carpool program. As it suggests, CATS and a bus route will be needed. A transportation plan is provided however it is not thorough.  Further details should be provided regarding budgetary implications of both a subsidized CATS pass and bus route. These details should also be scaled as the school grows.	Greg Schermbeck	Transportati
any provision of breakfast?	Amy Ruck Kagan	School Lunch
Close attention should be paid to the budget to ensure an appropriate amount is being leveraged to cover projected food costs.	Greg Schermbeck	School Lunch
don't see workmen's comp o this list	Amy Ruck Kagan	Civil Liabil
Appendices are attached but are incomplete. Neither provides information regarding a projected facility or related inspections.  The timeline for securing a facility is appropriate however additional details should include proposed buildings in the neighborhood that serves the desired population. Projected costs of those buildings should also be included.  A contingency plan is included however it is not detailed. The plan suggests that classrooms at JCSU would be utilized however it there is no official agreement or description of specific need.	Greg Schermbeck	Facility and
Have discussions occurred with the college to use their facility? If so, has a lease been discussed?	Shannon Sellers	Facility and
would need assurances about contingency plans and need to know about location	Amy Ruck Kagan	Facility and

Reviewer	Score
Cheryl Turner	
Amy Ruck Kagan	Pass
Leigh MObley	
Becky Taylor	
Helen Nance	
Alex Quigley	
Greg Schermbeck	Fail
Tracy Kelley	Pass
Shannon Sellers	Pass
Alan Hawkes	
Steven Walker	

## VI. FINANCIAL PLAN

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

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

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

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

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

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

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

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

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

LEA #1 600 - Charlotte-Mecklenburg Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,505.20	486	\$2,189,527.20
Local Funds	\$2,318.40	486	\$1,126,742.40
Federal EC Funds	\$3,768.11	49	\$184,637.39
<b>Totals</b>			\$3,500,906.99

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
<b>-State ADM Funds</b>	\$2,189,527	\$2,500,658	\$2,750,725	\$3,000,791	\$3,250,857
<b>-Local Per Pupil Funds</b>	\$1,126,742	\$1,251,936	\$1,377,130	\$1,502,323	\$1,627,517
<b>-Exceptional Children Federal Funds</b>	\$184,637	\$212,056	\$231,691	\$255,253	\$274,888
<b>-Other Funds*</b>	\$0	\$0	\$0	\$0	\$0
<b>-Working Capital*</b>	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	\$3,500,907	\$3,964,650	\$4,359,546	\$4,758,367	\$5,153,262

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

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

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

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Principal	1	\$100,000	\$100,000	1	\$102,000	\$102,000	1	\$104,040	\$104,040	1	\$106,121	\$106,121	1	\$108,243	\$108,243
Asst Principal	1	\$65,000	\$65,000	1	\$66,300	\$66,300	1	\$67,626	\$67,626	1	\$68,979	\$68,979	1	\$70,358	\$70,358
Business Manager	1	\$50,000	\$50,000	1	\$51,000	\$51,000	1	\$52,020	\$52,020	1	\$53,060	\$53,060	1	\$54,122	\$54,122
Registrar	1	\$38,000	\$38,000	1	\$38,760	\$38,760	1	\$39,535	\$39,535	1	\$40,326	\$40,326	1	\$41,132	\$41,132
Admin Asst/Enrollment Coord	1	\$35,000	\$35,000	1	\$35,700	\$35,700	1	\$36,414	\$36,414	1	\$37,142	\$37,142	1	\$37,885	\$37,885
Admin Asst/Receptionist	1	\$28,000	\$28,000	1	\$28,560	\$28,560	1	\$29,131	\$29,131	2	\$29,714	\$59,428	2	\$30,308	\$60,616
Custodians	1	\$38,000	\$38,000	1	\$38,760	\$38,760	1	\$39,535	\$39,535	1	\$40,326	\$40,326	1	\$41,132	\$41,132
A - Total Admin and Support:	7		\$354,000	7		\$361,080	7		\$368,301	8		\$405,382	8		\$413,488
Instructional Personnel:															
Core Content Teacher(s)	18	\$40,000	\$720,000	20	\$41,720	\$834,400	22	\$43,231	\$951,082	26	\$44,858	\$1,166,308	27	\$46,138	\$1,245,726
Electives/Specialty Teacher(s)	8	\$38,750	\$310,000	8	\$39,525	\$316,200	9	\$40,280	\$362,520	9	\$41,086	\$369,774	9	\$41,908	\$377,172
Exceptional Children Teacher(s)	3	\$42,667	\$128,001	3	\$43,520	\$130,560	3	\$44,390	\$133,170	3	\$45,278	\$135,834	3	\$46,184	\$138,552
Teacher Aides	6	\$23,000	\$138,000	6	\$23,460	\$140,760	6	\$23,929	\$143,574	6	\$24,408	\$146,448	6	\$24,896	\$149,376
B - Total Instructional Personnel:	35		\$1,296,001	37		\$1,421,920	40		\$1,590,346	44		\$1,818,364	45		\$1,910,826

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

A+B = C - Total Admin, Support and Instructional Personnel:	42		\$1,650,001	44		\$1,783,000	47		\$1,958,647	52		\$2,223,746	53		\$2,324,314
Administrative & Support Benefits															
Health Insurance	7	\$5,561	\$38,927	7	\$5,839	\$40,873	7	\$6,131	\$42,917	8	\$6,439	\$51,512	8	\$6,761	\$54,088
Retirement Plan--NC State	7	\$7,692	\$53,844	7	\$7,846	\$54,922	7	\$8,003	\$56,021	8	\$7,707	\$61,656	8	\$7,861	\$62,888
Life Insurance	7	\$7	\$49	7	\$7	\$49	7	\$8	\$56	8	\$7	\$56	8	\$8	\$64
Disability	7	\$126	\$882	7	\$129	\$903	7	\$132	\$924	8	\$127	\$1,016	8	\$129	\$1,032
Medicare	7	\$733	\$5,131	7	\$748	\$5,236	7	\$763	\$5,341	8	\$735	\$5,880	8	\$749	\$5,992
Social Security	7	\$3,135	\$21,945	7	\$3,198	\$22,386	7	\$3,262	\$22,834	8	\$3,142	\$25,136	8	\$3,205	\$25,640
D - Total Admin and Support Benefits:	42		\$120,778	42		\$124,369	42		\$128,093	48		\$145,256	48		\$149,704
Instructional Personnel Benefits:															
Health Insurance	35	\$5,561	\$194,635	37	\$5,839	\$216,043	40	\$6,131	\$245,240	44	\$6,438	\$283,272	45	\$6,760	\$304,200
Retirement Plan--NC State	35	\$5,632	\$197,120	37	\$5,845	\$216,265	40	\$6,047	\$241,880	44	\$6,286	\$276,584	45	\$6,459	\$290,655
Social Security	35	\$5	\$175	37	\$6	\$222	40	\$6	\$240	44	\$6	\$264	45	\$6	\$270
Disability	35	\$93	\$3,255	37	\$96	\$3,552	40	\$99	\$3,960	44	\$103	\$4,532	45	\$106	\$4,770
Medicare	35	\$537	\$18,795	37	\$557	\$20,609	40	\$577	\$23,080	44	\$599	\$26,356	45	\$616	\$27,720
Life Insurance	35	\$2,296	\$80,360	37	\$2,383	\$88,171	40	\$2,465	\$98,600	44	\$2,562	\$112,728	45	\$2,633	\$118,485
E - Total Instructional Personnel Benefits:	210		\$494,340	222		\$544,862	240		\$613,000	264		\$703,736	270		\$746,100
D+E = F - Total Personnel Benefits	252		\$615,118	264		\$669,231	282		\$741,093	312		\$848,992	318		\$895,804
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	49		\$474,778	49		\$485,449	49		\$496,394	56		\$550,638	56		\$563,192
B+E = H - Total Instructional Personnel (Salary & Benefits)	245		\$1,790,341	259		\$1,966,782	280		\$2,203,346	308		\$2,522,100	315		\$2,656,926
G+H = J - TOTAL PERSONNEL	294		\$2,265,119	308		\$2,452,231	329		\$2,699,740	364		\$3,072,738	371		\$3,220,118

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
	Administrative & Support:					
Office:	Office Supplies	\$6,000	\$6,286	\$6,714	\$7,429	\$7,571
	Postage	\$3,000	\$3,171	\$3,429	\$3,771	\$3,857
	Computers & Software	\$6,000	\$6,343	\$6,857	\$7,543	\$7,714
	Communications & Telephone	\$14,400	\$15,360	\$16,800	\$19,200	\$19,680
	Copier leases	\$14,400	\$14,400	\$14,400	\$21,600	\$21,600
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000
	Audit Fees	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000
	Other Professional	\$18,000	\$18,000	\$18,000	\$18,000	\$18,000
Facilities	Facility Lease/Mortgage	\$400,000	\$462,000	\$540,000	\$585,000	\$700,000
	Maintenance	\$30,000	\$33,000	\$36,300	\$39,930	\$43,923
	Custodial Supplies	\$6,000	\$6,600	\$7,260	\$7,986	\$8,785
	Custodial Contract	\$30,000	\$33,000	\$36,300	\$39,930	\$43,923
	Insurance (pg19)	\$22,485	\$24,977	\$26,453	\$28,679	\$29,524
	Other	\$5,000	\$5,100	\$5,202	\$5,306	\$5,412
Utilities	Electric	\$52,000	\$56,700	\$61,875	\$63,000	\$70,000
	Gas	\$14,000	\$14,700	\$16,875	\$16,875	\$19,500
	Water/Sewer	\$6,000	\$6,300	\$6,750	\$6,750	\$8,000
	Trash	\$12,000	\$12,600	\$13,230	\$13,892	\$14,586
Transportation	Buses	\$180,000	\$180,000	\$225,000	\$225,000	\$270,000
Other	Marketing	\$25,000	\$20,000	\$15,000	\$15,000	\$15,000
	Child nutrition	\$87,480	\$97,200	\$106,920	\$116,640	\$126,360
	Travel	\$6,000	\$6,300	\$6,615	\$6,946	\$7,293
	Other	\$12,000	\$13,800	\$15,180	\$16,698	\$18,368
	<b>K - TOTAL Administrative &amp; Support Operations</b>	<b>\$966,765</b>	<b>\$1,052,837</b>	<b>\$1,202,160</b>	<b>\$1,282,175</b>	<b>\$1,476,096</b>
	Instructional:					
Classroom Technology	Software	\$3,600	\$12,000	\$36,000	\$36,000	\$48,000
Instructional Contract	Student Services	\$14,580	\$18,900	\$20,790	\$23,360	\$26,066
	Staff Development	\$31,500	\$33,000	\$35,250	\$39,000	\$39,750
Books and Supplies	Instructional Materials	\$36,450	\$54,000	\$61,182	\$68,746	\$76,709
	Curriculum/Texts	\$36,450	\$67,500	\$80,190	\$90,720	\$101,790



Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

	Copy Paper	\$12,150	\$13,500	\$15,296	\$17,187	\$19,177
	Testing Supplies	\$12,150	\$16,200	\$23,760	\$32,400	\$42,120
	L - TOTAL Instructional Operations	\$146,880	\$215,100	\$272,468	\$307,413	\$353,612
	K+L = M - TOTAL OPERATIONS	\$1,113,645	\$1,267,937	\$1,474,628	\$1,589,588	\$1,829,708

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2016-2017</b>	<b>2017-2018</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>
J - TOTAL PERSONNEL	\$2,265,119	\$2,452,231	\$2,699,740	\$3,072,738	\$3,220,118
M - TOTAL OPERATIONS	\$1,113,645	\$1,267,937	\$1,474,628	\$1,589,588	\$1,829,708
J+ M =N TOTAL EXPENDITURES	\$3,378,764	\$3,720,168	\$4,174,368	\$4,662,326	\$5,049,826
Z - TOTAL REVENUE	\$3,500,907	\$3,964,650	\$4,359,546	\$4,758,367	\$5,153,262
Z - N = SURPLUS / (DEFICIT)	\$122,143	\$244,482	\$185,178	\$96,041	\$103,436

**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.*

Francis Classical School, opening with grades K-8, will become a K-12 school in 5 years by adding one additional grade level in years 2-5. This will give the inaugural year 8th graders five years of a rigorous education in a school attuned to diverse needs and remediation that is likely needed among a portion of its students. We decided on the student enrollment projections based on a number of factors, all of which enforce our belief that there is a demand for a classical liberal arts school. 1) This is a mere fraction of the total student population in Charlotte-Mecklenburg and with the excellent classical education we intend to offer we anticipate a strong demand among families as indicated, for example, through a survey, a public forum and small group meetings. 2) We believe a K-12 model eliminates the academic achievement gap that often occurs when students transition from one school to another, such as from elementary school to middle school to high school. 3) The small school environment and continuity of curriculum and approach from kindergarten through 12th grade ensures students who attends FCS are prepared for the rigors of life beyond high school. 4) A K-12 school offers many families the option of a single school for, in many cases, all of their children, instead of having siblings spread throughout two or more locations. 5) A K-12 of around 702 students is large enough to attract excellent teachers with various fields of mastery, yet small enough so that the Principal knows every student and each student's needs can be more readily supported.

We believe that the school can operate at a break-even level the first year with 300 students without having to undertake significant changes. Staff and teacher positions can be reduced with corresponding reductions in operating expenses.

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

The Board will not only be monitoring its financial decisions closely, but will also be listening intently for the community's response and interest as the school is announced and marketed. The Board will be developing contingency plans throughout the planning process based on this community

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

feedback, particularly as it approaches decisions around the facility and other significant financial considerations.

In addition to responding to early demand interest, the Board will be mindful of the risks of long-term commitments and will seek to negotiate contracts and commitments that can be adjusted should enrollment not meet minimum levels.

The largest areas of financial exposure are in personnel, transportation, and facility costs. If expenses need to be reduced due to lower than anticipated enrollment, reductions could be made in each of those areas to have the greatest impact.

*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 budget was developed on the foundation that the ADM-based funds provided by the State and County would cover all reasonable and necessary expenses to meet the educational mission of Francis Classical School. We also took a conservative approach in estimating many of the expenses by building contingencies into the line items. Our 5-year budget results in average annual surpluses of over 3.5% that can be set aside for unanticipated needs and to support growth.

To further strengthen the financial structure of the school and to fund enhancements to instructional materials, staff development, extra-curricular opportunities, and the school environment, we will apply for grants and charitable contributions from public and private sources. We will seek community support through in-kind donations of goods and services. And, we will leverage the development experience and successes of Elon Homes & Schools for Children to support those efforts. We chose, however, not to include these additional funding sources in our budget as they cannot be guaranteed and we do not want to have to rely on them to cover the fundamental needs of the school.

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

Instructional Staff Ratio of 14:1

- 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.*

Francis Classical does not intend to contract for student accounting and financial services. We intend to hire both a Business Manager and a Registrar who bring relevant experience with them and can perform those services with the support and infrastructure provided by Elon Homes & Schools for Children.

We will contract for exceptional children instructional support and for other student services, as needed, to ensure every student has the supports necessary to succeed.

We have budgeted to utilize 3rd party vendors for custodial, transportation, and food services. These contracts, and any others, will be awarded

according to school policies which will include guidelines for competitive bidding, independent awards, reviews by the superintendent, and pre-audit certifications. In addition any purchases made from restricted funding sources will be made in accordance with the funder's requirements. In all cases, vendors will be scrutinized to ensure appropriate certifications, licensing, insurance coverage, and bonding, if required.

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

The budget supports the school's mission and curricular offerings by investing in highly qualified staff and in meaningful instructional materials to support a classical education. Spending for classroom technology will be moderate, which aligns with the classical model based on a rigorous liberal arts education.

The school will develop a transportation plan to ensure that transportation is not a barrier to any child who is enrolled. The budget includes providing a combination of up to 4 buses and/or public transit passes in year 1 to supplement carpooling and family drop-offs.

The budget provides for the leasing of a 40,000 - 50,000 square foot facility using a phased approach for improvements to accommodate the growth.

Ultimately, the budget provides a financial model that holds the board and the staff accountable to operate responsibly and within its means. This framework aligns with the school's mission to operate within the principles of moral character and civic virtue.

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

The budget was developed with a modest goal of a surplus of an average of 3.5% per year over the first 5 years - without reliance on additional sources of funding, such as charitable giving and grants. By year 5, the fund balance will have accumulated to over \$750,000, which represents 15% of the 5th year budget (or approximately 2 months of expenses). The first five years are characterized as building years, requiring funds being reinvested in that growth. After year 5, the school will be at capacity and expenses will normalize. As such, with the positive fund balance, the school will be in a strong position to strategically plan for future needs while continuing to build its reserves to further support its mission.

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

The school does not intend to use traditional lender financing to purchase assets in the first 5 years. The school does intend to lease its facility and may enter into leasing arrangements for equipment and technology in the school. These considerations have been included in the budget provided.

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*

We have not made arrangements to secure assets from other sources at this

Francis Classical School - To train the minds and improve the hearts of young people through a rigorous, classical education in the liberal arts and sciences, with instruction in the principles of moral character and civic virtue.

time.

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

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

The school will use generally accepted accounting principles to record financial transactions. We will use the ISIS accounting software which incorporates the standard chart of accounts approved by the North Carolina Department of Public Instruction. Policies will be written and enforced to ensure adequate review and approval procedures are in place to include segregation of duties, safeguarding of assets, and accurate and adequate record-keeping.

The Business Manager will be supported by the Chief Financial Officer (CFO) of Elon Homes & Schools for Children. The CFO will review the bank statements and financial statements on a monthly basis, as will the Board. The CFO will work with the school staff to assign budget accountability and to regularly review actual and projected budget variances so that timely and informed decisions can be made.

An annual audit will be conducted by an independent certified public accounting firm as prescribed for charter schools according to North Carolina state law. As part of the annual audit, internal controls will be assessed and tested, with findings presented to the Board.

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

No related party transactions are anticipated.

*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.*

STOUT STUART MCGOWEN & KING LLP  
Patricia Rhodes, Partner  
P.O. Box 1440  
1233 S. Church Street  
Burlington, NC 27216-1440  
Tel: 336-226-7343, Fax: 336-229-4204

<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
486 students is a lot for the first year not sure that this is realistic. 49 EC Students seems low.	Shannon Sellers	Budget Reven
2nd box was not checked because it is not applicable for this candidate.	Greg Schermbeck	Total Budget
upon what number are they calculating EC federal funds?	Amy Ruck Kagan	Total Budget
Question the need for a receptionist, registrar and administrative asst in year 1, seems someone top heavy but may be feasible given ED/Superintendent is not on school payroll.	Tracy Kelley	Personnel Bu
Paying a Principal \$100,000 does not seem to be an appropriate use of funds nor is it realistic in a charter's founding year. Questions should be asked regarding the pay structure, particularly for a Principal of a school that is projected to have less than 60 students per grade level.	Greg Schermbeck	Personnel Bu
\$100,000 seems like a lot for a Principal during the first year. Office Personnel seems to be a bit much the first year. Is it necessary to have a registrar and an enrollment assistant?	Shannon Sellers	Personnel Bu
Additional questions should be asked about the following budget items: Child Nutrition - \$87,480 - It is unclear what these funds should cover. The school should budget costs to pay for the food vendor but also discuss if cafeteria or any food specific workers will be hired. Staff Development - \$31,500 - It is also unclear how these funds will be spent and what will be covered within the \$31,500. Buses - \$180,000 - The school budgeted the same amount of funds for years 1&2 however the school is expected to increase students in year 2. The transportation budget should reflect these costs and growth. Further, it is unclear what the \$180,000 will cover (number of buses, length of route, insurance, etc.).	Greg Schermbeck	Operations B
What will the \$180,000 for years one and two be spent on in regards to transportation? \$180,000 is a lot in transportation for the first year.	Shannon Sellers	Operations B
low computer costs low legal counsel costs what is other professional? more details about lease custodial contract with full time custodian insurance costs differ from other page	Amy Ruck Kagan	Operations B
Is there money allocated for contracted related services?	Leigh MObley	Operations B
need more detail about fluctuating surplus	Amy Ruck Kagan	Total Expend
no contingency plan	Amy Ruck Kagan	Budget Narra
Still believe that 486 students in year one is a high number. Has the budget been worked with 300 students versus the projected 486? The financial contingency plan does not seem to be in place. The applicant states they will apply for grants, what happens if you do not receive these grants?	Shannon Sellers	Budget Narra
As the application states, the school does not project to use a traditional lender to finance assets. Additional information should be gathered to understand how these assets will be financed.  A contingency plan is not outlined. The application simply states that a contingency plan will be developed as the school is projected to open.  Additional information should be gathered to determine if \$180,000 could actually cover the costs of 4 buses for transportation.	Greg Schermbeck	Budget Narra
A financial audit process is mentioned but thorough procedures and methods are not included.	Greg Schermbeck	Financial Au

<b>Reviewer</b>	<b>Score</b>
Alex Quigley	
Cheryl Turner	
Helen Nance	
Greg Schermbeck	Pass
Amy Ruck Kagan	Pass
Alan Hawkes	
Leigh MObley	
Steven Walker	
Tracy Kelley	Pass
Becky Taylor	
Shannon Sellers	Pass



**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).*

francisclassical2016

Date: 09/26/2014

**Applicant Signature:**

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

Print/Type Name: francisclassical2016

Board Position: Superintendent

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

Date: 09/26/2014

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

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Official Seal

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

## OVERALL ASSESSMENT

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

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

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

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

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

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>
7 HN, AQ, ES, TS, BT, SR, CT	4 JM, SW, AH, 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.***

<b>Initial Screening</b>	
<b>Mission, Purposes, and Goals</b>	- shannon1974
<b>Education Plan</b>	- shannon1974
<b>Governance and Capacity</b>	Ok, even though Appendix E is not attached. - shannon1974
<b>Operations</b>	A facility has not been located at this time, so there is nothing to attach to the appendix. - shannon1974
<b>Financial Plan</b>	- shannon1974
<b>OVERALL</b>	- dtsmith840 - shannon1974 - shannon1974

<b>External Evaluator</b>	
<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> more details about classical education - aruckkagan</p> <p><u>Educational Need and Targeted Student Population</u> Evidence of Educational Need is attached. More information should be requested including the number of respondents (not %), anticipated school leader and other pertinent information. It lists statistics from other successful charters that follow a similar model, but that does not guarantee success in the Charlotte area.</p> <p>Additional information should also be provided regarding the projected population that will be served at FCS. The given information states the school will serve a similar population to that of any CMS school and will be located in possibly three different areas of the city. However, no information is provided regarding the demographics of those three areas or the related academic achievement metrics of those areas.</p> <p>- gscherbeck</p> <p><u>Educational Need and Targeted Student Population</u> where has it been tested and with what results? don't yet see correlation between program and target population - aruckkagan</p> <p><u>Educational Need and Targeted Student Population</u> There doesn't seem to be a certain targeted student population. It mentions the Charlotte Mecklenburg area but does not address specific targeted population. Still have concerns about 400 plus students in the opening year. Appendix A shows the need for a charter school of this type. How many people were surveyed? What is the targeted population? - shannon1974</p>

	<p><u>Purposes of Proposed Charter School</u>  The applicant clearly outlines how FCS will provide expanded learning opportunities in Charlotte (#3). However, the professional development opportunities for teachers is vague. Additional information should be provided regarding the content covered in PD sessions and how success will be measured. Simply stating "10 training days" is not sufficient nor does it guarantee student success.</p> <p>The second box was not checked because the identified purposes are vague and doesn't specify how success will be measured.  - gschermbek</p> <p><u>Purposes of Proposed Charter School</u>  continually mention that classical education thrived at the time of the founding- how will they make it still relevant?  - aruckkagan</p> <p><u>Goals for the Proposed Charter School</u>  A clear process for performance goals are not outlined nor are performance goals measurable.</p> <p>The listed goals are focused on grades 7-12 and do not provide clear metrics for how success will be measured and why grades K-6 are not a focus point. Further, Goal 1, which indicates academic proficiency, states that success will be measured by students transitioning from one grade level to the next. However, no information is provided regarding how students will progress to the next grade.</p> <p>In all, goals are listed but are clearly defined nor is information provided regarding how each goal will be measured. - gschermbek</p> <p><u>Goals for the Proposed Charter School</u>  goals weak and do not demonstrate correlation to standards or assessments  governance goal is not measurable  stakeholder involvement  monitoring and tracking included - aruckkagan</p> <p><u>Goals for the Proposed Charter School</u>  Goals are not clear nor specific. How will these numbers be reached? By what standards are students promoted? Judgement calls can often contain bias. Is there going to be a set standard for an "S, N, or U"? - shannon1974</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u>  more info needed about assessments, how approaches will work together, ways in which these approaches will be used, curriculum, etc.  no evidence cited - aruckkagan</p> <p><u>Instructional Program</u>  The evidence is there from other districts on how the programs will work. More information is needed on how the programs will be implemented at the school. What assessments will be used other than teacher made test and end of year assessments? How will the school use data. - shannon1974</p> <p><u>Instructional Program</u>  The application provides evidence regarding successes of the proposed approach in other markets. Additional information should be gathered regarding how data will be used</p>

<p>within the proposed approaches and how success will be measured. Simply listing strategies is not sufficient. - gscherbeck</p> <p><u>Curriculum and Instructional Design</u> The framework is very broad for elementary and middle only focusing on history. This needs to be more comprehensive. The calendar clearly shows student days. What about professional development days? - shannon1974</p> <p><u>Curriculum and Instructional Design</u> Curriculum Outline is attached and fairly detailed. More information should be included that states the related objectives for each unit. Core Content - The attached document lists example content for 9-12, however the school is serving grades K-8 in its opening year. Therefore, additional information should be provided regarding specific content that will be offered in the founding year. Instructional Calendar should highlight teacher PD days and what will be covered within those days. - gscherbeck</p> <p><u>Special Programs and "At-Risk" Students</u> data and evidence still needed need alternatives to the proposed curricula examples of assessment and diagnostic tools further detail on the data used for RTI examples of ELL assessments - aruckkagan</p> <p><u>Special Programs and "At-Risk" Students</u> What assessments will be used to determine student placement? Are you planning to use the state assessments for entrance into ELL or your own assessment? A Special Ed teacher should only be involved in ELL placement if the ELL student has a learning disability. - shannon1974</p> <p><u>Special Programs and "At-Risk" Students</u> There is minimal mention of using diagnostic exams to identify all learners and of how data will be used to differentiate instruction for students. Additional information should also be gathered regarding how small group or pull out instruction will increase students learning. Particularly those performing below grade level.</p> <p>There is a strong plan in place to work with ELLs. More questions should be asked regarding the specifics of the planned program.</p> <p>A clear plan is not in place to enhance the academic opportunities for gifted students. The application states that differentiated instruction and student grouping will be utilized, however outside of identifying gifted students, no clear plan is described. - gscherbeck</p> <p><u>Exceptional Children – Identification and Records</u> What is the process if a parent makes a referral for evaluations? Who will determine if a student should be evaluated or not? This portion is out of compliance in regards to determining eligibility. - michelle_mobley</p> <p><u>Exceptional Children – Identification and Records</u> Clear process and steps are outlined. School should be encouraged to utilize data more frequently to better gauge progress. - gscherbeck</p> <p><u>Exceptional Children – Education Programming</u></p>
---

	<p>who comprises the SS team? - aruckkagan</p> <p><u>Exceptional Children – Education Programming</u> Students with IEP's should receive progress reports throughout the semester, not just at the end. - shannon1974</p> <p><u>Exceptional Children – Education Programming</u> Is the student services staff highly qualified to provide specially designed instruction? What is the process if a parent makes a referral for evaluations? Is there an Exceptional Children's teacher? - michelle_mobley</p> <p><u>Exceptional Children – Education Programming</u> A clear process and framework are in place. Again, the school should be encouraged to use data more frequently. Once a semester is not sufficient. - gscherbeck</p> <p><u>Student Performance Standards</u> describe grade level standards how are they measuring goals- growth for example? still unclear how assessment information is going to be utilized may retain a great deal of students based on reading levels - aruckkagan</p> <p><u>Student Performance Standards</u> How will the data from these assessments be used to drive instruction? How will data be shared with the board? - shannon1974</p> <p><u>Student Performance Standards</u> More specificity should be given to the performance standards. It appears a rough outline is provided however the school should continue to break down these goals in order for each to be student and family friendly.</p> <p>There is a clear list of evaluation assessments that will be utilized. It will be critical that the school leader and teachers properly use this data to drive instruction.</p> <p>There is mention of policies and standards for promotion however more detailed is required. Statements are general and do not provide a clear process. - gscherbeck</p> <p><u>Student Conduct and Discipline</u> The draft student handbook is thorough however it is leveraged from the Kennedy Charter handbook. Questions should be posed regarding why the school wanted to use a similar frame and code of conduct as Kennedy. Specifically, since Kennedy has recorded low academic outcomes, how does FCS plan to differentiate their handbook and ensure their school is successful.</p> <p>More information should also be provided regarding the student discipline policy. Outside of the character traits listed, minimal information is provided within the application. The handbook does explain different levels of discipline for a variety of student acts yet there is no specificity to how the levels of discipline will be decided. There is also no mention of a student's conduct program that reinforces positive behavior and holds students accountable through clear steps in the discipline process. - gscherbeck</p> <p><u>Student Conduct and Discipline</u> wide berth for ten day suspension unclear about infractions</p>
--	---

	<p>unclear about special education or other at risk students how will the 8 pillars be taught or reflected in school environment - aruckkagan</p> <p><u>Student Conduct and Discipline</u> What is the discipline procedures for students with disabilities, including manifestation determination review, change in placement and provision of services? Discipline procedural safeguards for students with disabilities are not in the handbook. - michelle_mobley</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Not checked since status is yet to be obtained. - gschermebeck</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> They have not applied for the non-profit status as of yet. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> can the board members have full crossover with an already existing non profit? need more info on the school structure- authority of superintendent- unclear how he is president of one org. and sup of school qualifications? discussed gov. vs. management- would like more detail first mention of replicating board from another NC school very administratively heavy - aruckkagan</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> This part of the application covers most bases and meets the suggested requirements. However, many aspects of this application refers to either a relation to Kennedy Charter or using similar systems. Attention must be paid to the academic success (or lack thereof) to Kennedy Charter. More specifically, should a proposed charter suggest a similar model and board that is related to an existing low-performing charter?</p> <p>Org. chart is attached however additional information should be provided regarding the structure of teachers, grade level teams and team leaders.</p> <p>The Superintendent of EHSC is also mentioned as being responsible for the Principal and the school's results. Additional information on the Superintendent, such and their professional background and results would be helpful.</p> <p>The application also states that there is overlap between the board of Kennedy Charter and that of FCS. Questions should be posed regarding the academic performance of Kennedy Charter and if it has captured appropriate successes to open a similar school.</p> <p>There is mention of evaluation criteria for the board but no clear plan. Additional details should gathered.</p> <p>It's made clear that the board is established to ensure FCS reaches its proposed goals. However, more clarity should be given regarding how each goal will be monitored, assessed and reached. - gschermebeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Potential conflict exist by having president of EHSC serving as Superintendent (i.e Executive Director. The role of FCS Board is to hold Superintendent accountable, if FCS Board is comprised of EHSC board members and the Superintendent has not resigned</p>

<p>from the EHSC board there is an inherent conflict of interest. What is the proficiency levels of Kennedy charter School? Who on the proposed board also serves on the Kennedy board? - kelleytracy</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The plan for governance seems to mimic that of Kennedy Charter School? Is this going to be a replication of another Charter School? Also, the superintendent is from EHSC is this a conflict of interest? How long can board members stay on the board? Can the board members on this board be the same board members of the EHSC board only with a different name? There is a mention of an evaluation for the board but no specifics. What is the evaluation for the administrator? - shannon1974</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Not checked because options were not applicable. - gscherbeck</p> <p><u>Projected Staff</u> I sped teacher? how will dual roles be managed? - aruckkagan</p> <p><u>Projected Staff</u> Will one Special Education teacher be enough? - shannon1974</p> <p><u>Staffing Plans, Hiring, and Management</u> huge salary ranges more information bout hiring high performing staff - aruckkagan</p> <p><u>Staffing Plans, Hiring, and Management</u> A recruitment and retention plan are included. Additional details should be included regarding a timeline for expected hires in order to ensure the school is fully staffed by its opening day.</p> <p>Questions should also be geared towards the Principal's potential maximum salary of \$115,000.</p> <p>The attached Employment Policies are detailed however was adopted from the Kennedy Charter, which some consider a low-performing charter school. FCS should provide clarity regarding why it felt FCS should use similar policies as Kennedy Charter. - gscherbeck</p> <p><u>Staff Evaluation and Professional Development</u> Its not clear if time is built into the school day for staff collaboration, with collaboration serving as PD. Whether the CPT is focused on taking instruction/learning to the next level of development, and addressing the needs of thw hole child. And unclear if there are established systems and protocols to guide collaborative discussions. More information is needed about how the school leaders will design a coordinated PD plan that aligns with stae standards for school performance and student achievement, as well as school priorities. How will PD and structures for collaboration be evaluated for their effect on raising student achievement. Please describe how teachers will receive post-observation feedback that is timely, actionable, and bite-sized and specifically targeted at areas that have immediate impact on student learning and improving instructional practices. - kelleytracy</p> <p><u>Staff Evaluation and Professional Development</u></p>
--



	<p>The application states that teachers will be observed "at least 4 times annually." A minimum of 4 observations should not be considered regular and questions should be directed towards understanding FCS's plan for teacher evaluation.</p> <p>Plans and process are in place for teacher development yet no framework or north star is mentioned. Therefore, it will be difficult to measure success without using a clear rubric or guiding document that all teachers understand. - gschermebeck</p> <p><u>Staff Evaluation and Professional Development</u> Will teachers have time to plan together? What will the PD look like during faculty meetings and teacher workdays? - shannon1974</p> <p><u>Marketing Plan</u> Additional information should be provided regarding the specific neighborhoods that will be hit and related number of families contacted throughout the marketing plan. A 1,000 names of prospective families are mentioned, but there aren't any specific dates related to that number. - gschermebeck</p> <p><u>Parent and Community Involvement</u> An Advisory Committee is mentioned yet there is no clear plan that describes the frequency or mediums for parent communication. Facebook and the FCS website is mentioned however it is fair to assume that not all FCS families will have regular and reliable internet access. - gschermebeck</p> <p><u>Parent and Community Involvement</u> Application does not provide details on community partnerships, linking the school with opportunities to learn outside of the school building i.e. universities, businesses, community based non profits, political stakeholders etc.)Will these opportunities be provided? - kellestracy</p> <p><u>Parent and Community Involvement</u> What about parents that don't have Facebook or other social media? How will you reach all parents? What community partnerships will be made? - shannon1974</p> <p><u>Admissions Policy</u> looks like they have done it before - aruckkagan</p> <p><u>Projected Student Enrollment (Table)</u> Its unclear whether or not the projected grade configuration and enrollment projections are realistic in design and scope. - kellestracy</p> <p><u>Projected Student Enrollment (Table)</u> Again - projected enrollment seems high for a first-year school. Great detail and plans must be provided and followed in order for marketing and student recruitment to be successful. Further, 54 students per grade level is small.</p> <p>13 boxes were selected however much more information should be gathered regarding this section of the application. - gschermebeck</p> <p><u>Projected Student Enrollment (Table)</u> 486 students is a lot for the first year in Charlotte. - shannon1974</p>
<b>Operations</b>	<p><u>Transportation Plan</u> FCS should expect to provide more transportation options outside of a carpool program.</p>

	<p>As it suggests, CATS and a bus route will be needed. A transportation plan is provided however it is not thorough.</p> <p>Further details should be provided regarding budgetary implications of both a subsidized CATS pass and bus route. These details should also be scaled as the school grows. - gschermebeck</p> <p><u>Transportation Plan</u> check for transportation costs in budget - aruckkagan</p> <p><u>Transportation Plan</u> How will district provide special transportation to students with disabilities if required per their IEP? - michelle_mobley</p> <p><u>School Lunch Plan</u> Close attention should be paid to the budget to ensure an appropriate amount is being leveraged to cover projected food costs. - gschermebeck</p> <p><u>School Lunch Plan</u> any provision of breakfast? - aruckkagan</p> <p><u>Civil Liability and Insurance</u> don't see workmen's comp o this list - aruckkagan</p> <p><u>Facility and Facility Contingency Plan</u> would need assurances about contingency plans and need to know about location - aruckkagan</p> <p><u>Facility and Facility Contingency Plan</u> Have discussions occurred with the college to use their facility? If so, has a lease been discussed? - shannon1974</p> <p><u>Facility and Facility Contingency Plan</u> Appendices are attached but are incomplete. Neither provides information regarding a projected facility or related inspections.</p> <p>The timeline for securing a facility is appropriate however additional details should include proposed buildings in the neighborhood that serves the desired population. Projected costs of those buildings should also be included.</p> <p>A contingency plan is included however it is not detailed. The plan suggests that classrooms at JCSU would be utilized however it there is no official agreement or description of specific need. - gschermebeck</p>
<p><b>Financial Plan</b></p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> 486 students is a lot for the first year not sure that this is realistic. 49 EC Students seems low. - shannon1974</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> 2nd box was not checked because it is not applicable for this candidate. - gschermebeck</p> <p><u>Total Budget Revenue Projections 2017-2021 (Table)</u> upon what number are they calculating EC federal funds? - aruckkagan</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u></p>

<p>Paying a Principal \$100,000 does not seem to be an appropriate use of funds nor is it realistic in a charter's founding year. Questions should be asked regarding the pay structure, particularly for a Principal of a school that is projected to have less than 60 students per grade level. - gscherbeck</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> Question the need for a receptionist, registrar and administrative asst in year 1, seems someone top heavy but may be feasible given ED/Superintendent is not on school payroll. - kellestracy</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> \$100,000 seems like a lot for a Principal during the first year. Office Personnel seems to be a bit much the first year. Is it necessary to have a registrar and an enrollment assistant? - shannon1974</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Additional questions should be asked about the following budget items: Child Nutrition - \$87,480 - It is unclear what these funds should cover. The school should budget costs to pay for the food vendor but also discuss if cafeteria or any food specific workers will be hired. Staff Development - \$31,500 - It is also unclear how these funds will be spent and what will be covered within the \$31,500. Buses - \$180,000 - The school budgeted the same amount of funds for years 1&amp;2 however the school is expected to increase students in year 2. The transportation budget should reflect these costs and growth. Further, it is unclear what the \$180,000 will cover (number of buses, length of route, insurance, etc.). - gscherbeck</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> low computer costs low legal counsel costs what is other professional? more details about lease custodial contract with full time custodian insurance costs differ from other page - aruckkagan</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> What will the \$180,000 for years one and two be spent on in regards to transportation? \$180,000 is a lot in transportation for the first year. - shannon1974</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Is there money allocated for contracted related services? - michelle_mobley</p> <p><u>Total Expenditure Projections (Table)</u> need more detail about fluctuating surplus - aruckkagan</p> <p><u>Budget Narrative</u> As the application states, the school does not project to use a traditional lender to finance assets. Additional information should be gathered to understand how these assets will be financed.</p> <p>A contingency plan is not outlined. The application simply states that a contingency plan will be developed as the school is projected to open.</p>
--

	<p>Additional information should be gathered to determine if \$180,000 could actually cover the costs of 4 buses for transportation. - gschermebeck</p> <p><u>Budget Narrative</u> no contingency plan - aruckkagan</p> <p><u>Budget Narrative</u> Still believe that 486 students in year one is a high number. Has the budget been worked with 300 students versus the projected 486? The financial contingency plan does not seem to be in place. The applicant states they will apply for grants, what happens if you do not receive these grants? - shannon1974</p> <p><u>Financial Audits</u> A financial audit process is mentioned but thorough procedures and methods are not included. - gschermebeck</p>
<b>OVERALL</b>	<p><u>Grade Levels Served and Total Student Enrollment:</u> Additional questions should be asked regarding why the school is opening as a K-8 and with 54 students per grade level.</p> <p>Opening a K-8 in a schools first year is aggressive and potentially damaging. Further, it is unclear how the school will be financially sustainable with only 54 students per grade level. - gschermebeck</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> opening K-8 is high stakes and requires different skillsets - aruckkagan</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> I have concerns about how realistic it is to enroll k-8year 1. Given that Kennedy charter is currently transitioning from alternative charter school to a reg charter school, and the learning outcomes have been less than stellar in terms of student academic achievement levels, concerns persist around the organizational capacity of this group to take on another k-8 charter at this time. - kelleltracy</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> 486 students seems high for Charlotte area schools as several that opened in 2014-2015 have struggled to reach 100. - shannon1974</p>

<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and Goals</b>	<p>Mr. Quigley explained that the board of Francis Classical School is affiliated with Kennedy Charter School. He noted that there were questions about their ability to manage both schools at the same time. The members of the board introduced themselves.</p> <p>Mr. Quigley asked what free services the college would provide to the school. The board chair responded that the college would provide support for the classical curriculum. It is funded through philanthropy.</p> <p>Mr. Maimone asked if there are any residential students at Kennedy. There are none. There are 10 percent in foster care.</p>

	<p>Ms. Sutton inquired about the urgency for starting the school since the results for Kennedy werent consistent. The board responded that they did not see a reason to wait. None of the board thinks that this is something that will not happen and they are excited about getting started. They are trying to crack the code to discover strategies that will be effective for the students at Kennedy. Mr. Sanchez stated that the board wanted to crack the code but there was no urgency to put it inside Kennedy. The board chair responded that Kennedy staff had been sent to Hillsdale for training.</p>
<p><b>Education Plan</b></p>	<p>The school will use Classical Education at Francis Classical. At Kennedy Charter the BOD has chosen to implement parts of the classical education program although students have struggled. Ms. Turner stated Johnson C. Smith has lost their education program.</p> <p>Ms. Taylor asked where Hillsdale College was located. A representative from Hillsdale college replied that it was located in Michigan. Mr. Walker asked about the Barney Charter School Initiative. The representative explained that it was an out reach from the college to help promote classical education. The Barney initiative is a department at the college that works with 8 schools around the country that are operating.</p> <p>Ms. Taylor asked why wouldn't the board offer the Barney program to Kennedy school since it was not doing well. The board chair replied that the board decision was to start fresh. In 4 to 5 years Kennedy may be turned into a classical school. The Barney mission is school start up and reform of school. Some components of the model have been implemented at Kennedy.</p> <p>Mr. Quigley noted that Kennedy had struggled and had benefited from the classical model and wondered why the classical curriculum was not implemented there first. The board replied that it was a matter of staffing and the board was not running the school</p> <p>Ms. Turner noted that Kennedy had been struggling for years and if the board had all of the responsibilities of the new start up they may treat the Kennedy students like throw a ways. Board stated Kennedy exceeded its growth numbers last year. Three members are not present today.</p>
<p><b>Governance and Capacity</b></p>	<p>Mr. Quigley asked about the relationships to Elon Homes. The board chair responded that Elon Homes, Kennedy Charter School and Francis Charter school are all under one umbrella but each has a separate 503c.</p> <p>Mr. Quigley asked the board about their connection to Kennedy Charter School and what were the hopes of opening a new school. The board replied that Kennedy was started by Elon Homes and it was a residential high school that moved its location. At first it was only foster kids and then it became alternative. Then it expanded to what is now a K-12 school. The board is trying to determine ways to improve Kennedy and they came across the classical school model and used some of it at Kennedy and it seemed to be going well and we wanted to expand the mission. All of the members that are on this board are also on Kennedys board. To be on the board of Francis or Kennedy you must be on the Elon Homes board.</p> <p>Ms. Taylor asked if anyone on the board had an education background. The board replied that none of them had an education background.</p> <p>Mr. Quigley asked if the superintendent reported to the board. The board chair explained that the superintendent, Fred Grosse, would be in charge of both Kennedy and Francis and</p>

	<p>would answer to the board.</p> <p>Ms. Nance asked why the principals salary would be \$100,000. The board replied that was the range for CMS and they wanted to be competitive and be able to get a qualified administrator.</p> <p>Ms. Taylor asked what would be the boards greatest challenge. The board responded that telling the story effectively to the market. Finances would not be an issue. It would be making sure that they got the numbers.</p> <p>Mr. Quigley asked for clarification on the board make-up. The board chair explained that all of the people on Francis are on Kennedy. Two original board members have dropped off.</p>
<b>Operations</b>	<p>Mr. Quigley asked for clarification on the enrollment and asked why that would be realistic. The board replied that there were eight thousand children on waiting list at the charter schools. The board wanted to open a K-8 and they could be comfortable with 300 students. They are anticipating very strong response from the community with 1200 applicants in the pool. The other Barney schools are oversupplied in other areas.</p> <p>Mr. Quigley stated that it would be hard to fill every grade level K-8 with the recent data in Charlotte. Mr. Maimone urged the board not to underestimate the demand for classical education. Charter schools are not supposed to be a carbon copy of what the LEA does. It is a very strong curriculum that is in demand.</p> <p>Mr Sanchez asked how the college would be able to provide ongoing support since they are so spread out across the US. The representative replied that the support would be provided in different phases and forms. Once the school is operating they take several professors to perform several days of teacher training. Once of the school is up weekly call and semester visits are had with the school leaders.</p> <p>Ms. Nance asked if Kennedy is on Johnston Smiths campus. The board replied that the high school was on the college campus. Francis Classical is looking at locations central to Charlotte.</p>
<b>Financial Plan</b>	
<b>OVERALL</b>	<p>Mr. Maimone commented that the outside evaluators thought that it was a strong model and would like to make a motion to forward them to the Ready to Open Process. Ms. Gibbs seconded the motion. Ms. Nance pointed out that the final decision was split between the external evaluators. Mr. Sanchez added that the board should be focused on Kennedy before splitting their time and governance for another school. Mr. Walker noted that Kennedy exceeded growth and when the classical curriculum was introduced they continue to have growth. These people are professionals and they can make the time to run both schools. Mr. Hawkes added that he has heard nothing bad about Hillsdale. Problems that we have heard from schools is finances and this school knows what they are doing. Mr. Maimone added that classical education works for at-risk students. Mr. Quigley commented that the school is in a major transition of moving an existing school and he does not feel that this is a right fit. Ms. Gibbs added that that people are serious about what they are doing with Hillsdale College. The children would be losing a year in which they could be learning. Mr. Sanchez noted that there has been a lot growth at Kennedy and the high school scores are still struggling. The motion failed 4-7 with Ms. Sutton, Mr. Quigley, Ms. Turner, Ms. Reeves, Ms. Taylor, Ms. Nance, and Mr. Sanchez</p>

	dissenting.
--	-------------

<b><u>Overall Summary</u></b>	
<b>Initial Screening</b>	OCS deems this application complete.
<b>10/22/2014</b>	The CSAB voted unanimously to deem this application complete on November 14, 2014.
<b>Application Review</b>	<p>On January 12, 2015 the CSAB subcommittee voted to move or deny this application to interview. The subcommittee vote was 6 yes to 0 no. The full CSAB vote was 10 yes to 0 no for interview.</p> <p>Concerns outlined consisted of the following:</p> <p>The subcommittee wants to talk to them. Board strengths and they understand governance.</p>
<b>Application Interview</b>	<p>On February 10, 2015 the CSAB subcommittee voted to not recommend this application to the SBE to start the planning year. The full CSAB vote was 7 to 4.</p> <p>Mr. Maimone wants support to approve this school to move forward to Ready to Open. Ms. Gibbs made the second. Mr. Sanchez restated concerns on capacity due to the current performance of Kennedy Charter. The full CSAB discussed the growth of Kennedy Charter. Mr. Walker encourages the applicant group to continue to implement the Classical components at Kennedy and feels the board is professional people and knows how to manage their time. Mr. Quigley has concerns about the BOD capacity with the current transitions that have happened with Kennedy this school year. Mr. Sanchez states the capacity of the board comes into question.</p>
<b>OVERALL</b>	This application will not move forward to Ready to Open. The CSAB encourages them to reapply next year