



### 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:

Deanna Townsend-Smith  
Kevin Piacenza  
Phyllis Gibbs  
Glenn Allen  
Avril Smart  
Robert McQuat  
Becky Taylor  
Steven Walker  
Tracy Kelley  
Brian Smith  
Tammi Sutton  
Sherry Reeves  
Buffy Fowler  
Anthony Helton

#### Date of Review:

Bonnie Cone Classical Academy - Bonnie Cone Classical Academy (BCCA) will equip students with the tools of learning to think critically, reason effectively, and communicate persuasively through the rigors of a classical education.

09/30/2016



# NORTH CAROLINA CHARTER SCHOOL APPLICATION

## Bonnie Cone Classical Academy

**Public charter schools opening the fall of 2018**

**Due by 5:00 pm, September 19, 2016**

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**  
**2016 Application Process**  
**To open a charter school in the 2018-2019 school year**

**APPLICATION DUE DATE/TIME**

**September 19, 2016** 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 19, 2016 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.
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

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## I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Bonnie Cone Classical Academy

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

Name of non-profit organization under which charter will be organized or operated: *Bonnie Cone Classical Academy*

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: *Martin F. McCarthy*

Title/Relationship to nonprofit: *Board member*

Mailing address: 4205 Quail Hunt Lane  
Charlotte NC 28226

Primary telephone: 704-763-0065 Alternative telephone: 704-543-8561

E-Mail address: mfm108@aol.com

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:

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

No:

Yes:

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

No:

Yes:

Bonnie Cone Classical Academy - Bonnie Cone Classical Academy (BCCA) will equip students with the tools of learning to think critically, reason effectively, and communicate persuasively through the rigors of a classical education.

*Acceleration*

Yes:

No:

*To be considered for acceleration applicants must meet four specific criteria. Provide supporting evidences of the following:*

*\*Demonstrate a clear and compelling need for the accelerated planning year*

*Partner with a two of four year institution of higher education in North Carolina*

*Attach Appendix A from the four year institution of higher education in NC to demonstrate a partnership  
Verify the absence of a charter school in the proposed county of location*

Yes:

No:

*Agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award.*

Yes:

No:

*What is the name of the nonprofit organization that governs this charter school?* Bonnie Cone Classical Academy

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

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

*Projected School Opening: Year 2018                      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	207
Second Year	K,01,02,03	276
Third Year	K,01,02,03,04	345
Fourth Year	K,01,02,03,04,05	414
Fifth Year	K,01,02,03,04,05,06	483

*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.*

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*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.*

bonnieconeclassical  
*Signature*

Chairperson  
*Title*

bonnieconeclassical  
*Printed Name*

09/19/2016  
*Date*



<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b><u>Reviewer</u></b>	<b><u>Page Reference</u></b>
<u>The enrollment figures are unrealistically large for year one. Please explain your reason for opting for going on a year round schedule? How will that decision impact the quality of learning. How will recruitment strategy be structured to enroll 2nd graders?</u>	<u>Tracy Kelley</u>	<u>Grade Levels</u>
<u>How are the projected enrollment numbers in alignment with the local LEA or charter schools in the area?</u>	<u>Brian Smith</u>	<u>Grade Levels</u>
<u>How many charters and traditional public schools are located in the region near UNCC? Is there significant interest from parents in the area for a classical school?</u>	<u>Sherry Reeves</u>	<u>Grade Levels</u>
<u>Is 69 students per grade level reasonable for a new school in a system operating with the number of existing charter schools in the CMS district? How will no transportation and students being expected to pack a lunch in the first year impact these numbers?</u>	<u>Buffy Fowler</u>	<u>Grade Levels</u>
<u>Here the box is checked that it will be a year round school but in description it describes the rationale for a traditional calendar. Which is correct?</u>		

<b><u>Reviewer</u></b>	<b><u>Score</u></b>
<u>Deanna Townsend-Smith</u>	
<u>Kevin Piacenza</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Glenn Allen</u>	
<u>Avril Smart</u>	<u>Pass</u>
<u>Robert McQuat</u>	
<u>Becky Taylor</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Tracy Kelley</u>	<u>Pass</u>
<u>Brian Smith</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Buffy Fowler</u>	<u>Pass</u>
<u>Anthony Helton</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:*

Bonnie Cone Classical Academy (BCCA) will equip students with the tools of learning to think critically, reason effectively, and communicate persuasively through the rigors of a classical education.

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

The mission of BCCA is to inspire each student to think critically, communicate effectively and achieve academic excellence by providing academic choice. The mission is to align the curriculum development in sequential and related stages (grammar: K-5; Logic: 5-8 & Rhetoric) to that of a child's brain development, to produce curious, literate young adults with continually developing intelligence. The mission uses history as its organizing principle, touching the life experience of all persons.

### **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.*

BCCA student demographics will closely reflect that of Charlotte-Mecklenburg Schools (CMS) which currently serve nearly 150,000 students (42% African America, 32% Caucasian, 18% Hispanic, 5% Asian, 3% Native American or multiracial). We anticipate that CMS demographics of 50% being economically disadvantaged will be the same for BCCA. We will locate the school in an area near UNCC that has broad access to the minority communities Charlotte region. BCCA will seek students in the Mecklenburg/Cabarrus area and will grow from K-2 to K-8 by its seventh year. CMS students represent enormous diversity and our school will strive to reflect this. We expect students from wide ranging backgrounds and we have selected curriculum and supplemental programming that recognizes the diverse learning abilities that attend this expectation.

The UNCC area is unique in that it is a large, well respected University, that is not surrounded by a high performing public school district. Through the stages and sequencing of classical education (each stage of a child's life development has learning foci that differ and are best worked with through the sequential stages of development: K-5 focuses on concrete thinking, whereas 6-8 focuses on conceptual thinking). While this is well proven, we note that each subject also has its own grammar, logic and

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rhetoric. So, for example, in the early years of a child's education it is more logical to focus on the grammar of the subject. In the middle school years it is appropriate to focus more on the logic of the subject. In this method learning is staged, cumulative, sequential, spiraling, and ever deepening. In this model of education children learn how to learn since they become more deeply proficient by the time they finish high school with all the tools of learning (each subject has its own grammar, logic and rhetoric, and they learn how to work with this). Essentially we address the learning deficit by utilizing a proven method that aligns with the brain development of the student and equips them with the tools for learning.

- 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).*

BCCA's total projected enrollment of 207 students in year one, is comprised of 69 students per grade level which represents less than 1% of the grade level enrollment throughout the CMS system. The local LEA has a student population nearing 150,000. Relevant to this is the recently published United Nations Population study that projects Charlotte to be the fastest growing large city in America for the next two decades. As a consequence demand for choices will grow even more evident. With the CMS population continuing to grow, we expect our percentage of enrollment to diminish relative to the local LEA.

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

BCCA will look to the past to provide an academic program of future success for its students through a classical curriculum. The classical curriculum structure was founded by the Greeks around ~2500 years ago (and even dates back to the Egyptians), and continues to enjoy refining development in the renewing movement of Classical in America. The Greeks believed a student had to be strong in mind and body in order to be a viable and contributing citizen to their democracy. The basic approach of their educational system, we have come to learn, as it is practiced in contemporary schools, is to provide instruction that is compatible with the development of the brain. The curriculum is organized in to three sequential and related stages, commonly known as: grammar, logic, and rhetoric (or the what, the how, and the why). In the grammar phase (K-5) the young mind is presented with the "what" such as the facts of the alphabet, numbers, cities and states. The middle school years introduces logic, or the focus on "how". For example the student learns about the human body and its related structure - the skeleton, associated ligaments, arteries, vessels, organs, and how the body accomplishes movement. In the final phase, the rhetoric component introduces the notion of "why". Why did the human body develop as it did?

Grammar instruction is taught prescriptively incorporating the use of diagramming to incorporate a visual picture of the rules of language. Students learn vocabulary by studying the knowledge of the origin and meaning of words emphasizing Latin and Greek roots. Latin provides the basis for over half of our English words. Its complex grammar allows students to gain a critical knowledge of the English sentence structure. Knowledge of Latin is a bridge to all romance languages. Additional characteristics defining literacy instruction are frequent and there is

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intensive use of dictionaries, along with reading and memorization of selections from classical literature.

Each lesson across all subject areas begins with key content area vocabulary that introduces students to new words critical to their understanding of the lesson, while reviewing vocabulary learned in previous years. Coupled with instruction in Latin and Greek roots, students are able to apply background knowledge and root word knowledge to discover the meaning of words.

Access to important and timeless works of literature is a key component of a classical education. One further component of literacy is a wide reading of the "Great Books" of the Western tradition. While students are encouraged to read many types of literature independently, the study of these classical works is done in a forum where overarching questions of each work allow the student to begin to explore depth and meaning to the great questions of life. Regardless of ability students come to understand and learn much about humanity by reading the writings of the greatest thinkers and writers of the Western tradition.

The trivium found in the classical curriculum applies in nearly every educational sphere because it accounts for the entire range of what education is supposed to do: the learner must grasp information, acquire it intellectually, and use it purposefully. To master any subject is to learn its language. The trivium integrates the theoretical and the practical, tying together facts, arguments, and real world applications.

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. BCCA will create new professional opportunities for teachers, including ownership of the learning program at the school site. At the end of the

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school year, administrators and faculty will complete a survey of the current learning programs in place and the professional development provided through the year. In addition there is a professional development needs assessment by administrators and faculty at both the beginning and the end of the school year. These results are analyzed along with student academic performance to update the professional development plan. If there is a discerned need for further professional development during the course of the academic year, the plan will be revised to include in-service training. The faculty members are the primary owners of the School's learning program. Faculty members in a particular core area meet periodically to assess how students are progressing and whether there are needs for curriculum modification. Recommendations are brought forward to the faculty for discussion and vote. Any approved revisions are then presented to the Administration for implementation.

2. Accountability will be a continual monitoring process through teacher observation and in class assignments. Highly qualified teachers are the best gauge regarding the growth and learning of each student. As teachers collect assignments and track progress on a daily basis, they are the first to notice when a problem emerges. They provide the intervention necessary when they see that the student is beginning to struggle. Our administrative team is in continual communication with teachers offering necessary support or guidance.

3. BCCA offers a small community to parents and students which stands out as an option for optimizing student/teacher relationships. In contrast, many of the traditional public schools have large student populations. The intimate community and accountability created by the smaller nature of the BCCA enrollment create an option some families want.

4. Classical education is language focused and learning is accomplished through written and spoken words. Subjects are aligned so that different disciplines speak to each other and students are able to make connections between them. The challenge of finding links between various fields of study is accomplished by using history to organize learning. This begins with the ancients and progresses to the moderns in history, science, literature, art and music. Classical education is knowledge centered. The mind is trained to collect and analyze information, and to draw conclusions based on that information. The teachers meet as grade level teams to discuss student achievement and growth along with the pacing of the curriculum. Grade level team leaders guide these meetings and report any concerns or questions to the Administration. The faculty also meet as subject area teams. These teams help to assure the consistency, sequencing and alignment of the curriculum. They also have opportunity to discuss student achievement and report any appropriate concerns to the Administration.

5. The classical curriculum is a proven track record of success for lower level learners. The curriculum is designed with differentiation in mind and lends itself to individualized instruction and to closing the gaps in learning. The assessments are built into the curriculum and provide formal assessment of the student. Coupled with the use of informal assessment throughout the year, teachers can consistently monitor the growth of individual students. Students needing assistance will be supported by caring teachers, peer tutors, and expanded after school tutoring program and

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assistance in other subjects by utilizing reading in the content area techniques.

6. BCCA offers a school where students in the district can attend for their entire K-8 career. This school model creates an atmosphere of academic excellence through a consistent K-8 design.

### **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.*

English/Language Arts -- Academic Improvement: By the end of the 2021-22 school year 80% of our students will be in the "meeting or exceeding" categories in Reading as shown on grade level data in fluency, comprehension and vocabulary.

Kindergarten, first and second grades will determine student achievement in the area of reading by using the following assessments: STAR, PALS, and or BAS (K uses Early Literacy Assessment in place of BAS such as DIBELS). Targets are Year 1 = 70%; Year 2 = 75%; Year 3 = 80%.

Mathematics -- Academic Improvement:

By year 3, 85% of students will be proficient at computation and problem solving at their grade level as measured on state tests and district benchmarks. Math targets each year include 65% will be proficient in computation and problem solving in Year 1; 75% will be proficient in Year 2; and 85% will be proficient in Year 3. Also, 60% of special education students, 65% of English language learners and 70% of minority students will be proficient by Year 5.

Professional Development Growth Goal:

Each school year BCCA will increase the professional staff development for charter identified instruction and learning support programs. The first and second year of operation will provide systematic professional development programs based on a written continuum that ensures all instructional staff have early and ongoing access for implementation of charter identified instructional and learning support programs. By year five, leadership demonstrates a commitment to increasing teacher instruction and providing individualized supports for staff such as instruction, mentoring and coaching programs to ensure that charter identified instructional and learning support programs are implemented. This will be implemented by the following strategies.

Evidence: Charter agreement; Professional development continuum; Collaboration calendar; Board approved budget; Leadership classroom observation log(s) with notes on areas of needed improvement and identification of school resources to address need; Accreditation external report.

Financial Goal:

BCCA's Board of Directors is responsible for ensuring that the school has adequate resources and that they are managed with fiscal integrity and discipline. The Board, in partnership with the school administration, will establish an annual fiscal plan in the first year of operation. There will

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be a budget administrator who will manage daily expenditures and publish a monthly variance report. This will provide the basis to ensure that the funds are managed in line the budgeted allowances. The Board will also ensure that accountability and responsibility are understood and will be monitored.

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

The governing Board will know that BCCA is working toward attaining their mission by:

**Academic:** The Board will examine annual academic scores and reports and monitor NWEA MAP results to make certain the school is meeting targeted growth and proficiency. the Board will examine the Professional Development Program to ensure that the school's instructional staff is being supported in their charge to carry out the mission of the school.

**Governance:** The Board will perform an Annual self-evaluation and will undergo annual training to ensure that Board meetings are conducted regularly and in accordance with the Charter Bylaws / Articles of Incorporation/ State statute. In addition, the Board will require a monthly operations update from the Head of School highlighting the progress of certain administrative or committee projects and assignments. The Board will conduct an evaluation of the Head of School on an annual basis. Lastly, the Board will establish and monitor a multi-year strategic plan, modifying as necessary and measuring progress.

**Financial:** The Board will monitor all financial transactions through the required accounting system via a set of monthly financial and transaction reports. The Board will compare current spending and revenue flow with the annual budget and identify any potential for overspending and take action to mitigate the negative effects of budget variances. The Board will also review the annual budget with the independent auditor to identify areas for increased efficiencies and improvements in financial management, thereby ensuring sufficient resources to support the school's core curriculum and mission.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<p>Why is history the organizing principle behind the mission and purpose of the organization?</p> <p>What specific student needs justify the use of sequential curriculum aligned to brain development?</p> <p>How can you clarify the connection between academic choice and curriculum aligned to the stages of a child's brain development? Is there a need for such curriculum in the current public school setting?</p>	Avril Smart	Mission Stat
<p>Short, concise mission statement that makes it clear that the school is about classical education.</p>	Steven Walker	Mission Stat
<p>What professional development is going to be offered to staff for classical education, FOSS, and other programs?</p>	Brian Smith	Mission Stat
<p>Targeted population is non-specific other than the proposed area of the school's location. Applicant projects population will mirror that of CMS.</p>	Sherry Reeves	Educational
<p>Has there been any survey of the community to determine interest?</p>	Buffy Fowler	Educational
<p>The group does not provide an articulation of how or why the CMS was chosen or why the specific classical model will meet the needs of CMS students. There is no discussion of the research basis for the selected educational program. What is the connection between the schools name and the CMS community? What about the classical (grammar, logic, rhetoric) approach will help close the gap and how does it specifically differ from what families have in CMS. What specific skill gaps will CMS students come with that your program design is equipped to remedy?</p>	Tracy Kelley	Educational
<p>Can the applicant provide any specific insight or evidence clarifying why the classical approach would be effective with the target population? Has the applicant gathered any data to support need (surveys, public meetings, questionnaires)?</p>	Kevin Piacenza	Educational
<p>Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>.</p>	Deanna Townsend-Smith	Educational
<p>How does the sequencing and stages of classical education align with the Common Core and NC State Standards? What data indicate a learning deficit can be addressed by curriculum aligned with the sequential stages of development? What research has been collected by the applicant (i.e., from parents or the surrounding community) to justify the application of classical sequencing approach with potential student population? In what way does the curriculum model presented here appeal to the sensibilities of currently home-schooled or private school students? How does the enrollment and projected growth interact with ADM in CMS for comparable K-8 schools? What are the explicit similarities/differences between the proposed education plan and that of the surrounding CMS k-8 public schools?</p>	Avril Smart	Educational
<p>Legislative Purpose 2. How can you provide more detail about the formative and summative evaluation and tracking of student achievement? What systems will the administration use to monitor and record observation and performance data?</p> <p>Legislative Purpose 3. What additional educational opportunities/choices are afforded to parents beyond a smaller community?</p> <p>Legislative Purpose 4. What evidence connects a classical education approach to student outcomes in K-8?</p> <p>Legislative Purpose 5. Beyond assessments, what features of the curriculum are designed to support high risk students? How can you explicitly connect the key components of classical curriculum to achievement outcomes?</p> <p>Legislative Purpose 6. How does classical curriculum offer innovative instructional approaches?</p>	Avril Smart	Purposes of
<p>Are there many licensed teachers who are trained in classical education? How</p>	Sherry Reeves	Purposes of



<p>will you assure that staff is appropriately equipped to teach using this model?          Will intensive professional development be offered before school begins Year 1?          Provide specific research that demonstrates how a classical education model is proven effective with low achieving students.</p>		
<p>The group does not outline the PD opportunities teachers will receive to support the classical (rhetoric, grammar, logic) model which is the core of the overall school design); as a result the purposes are not clearly aligned with the proposed mission--to provide a classical education model. The group's description of how it will improve student learning is not sufficiently specific and not meaningfully targeted or focused on improving academic outcomes for the targeted student population. Discuss evidence to support contention that the classical education approach has a record of success in educating lower level learners. How does the specific curriculum lend itself to individualized instruction in a way and with more intentionality than the LEA or other approaches in CMS. The discussion of accountability is not discussed in terms of creating a data driven learning environment. There is no discussion as to how the school as a whole will hold itself accountable or how it will know that the instructional program is effective. The issue of accountability rests with the teacher who discovers that learning is not taking place rather than school leaders holding teachers accountable for student learning. The group attempts to address 5 out of 6 legislative purposes but addresses none of them with the necessary intentionality that instills confidence that they will have a positive, sustainable, and meaningful impact on student learning. Discuss your core beliefs on education, student learning and how best to close the achievement gap.</p>	<p>Tracy Kelley</p>	<p>Purposes of</p>
<p>Explain how teachers and administrators will be held accountable for meeting measures.</p>	<p>Buffy Fowler</p>	<p>Purposes of</p>
<p>I agree with the sentiment in number 2, and it is very important to have highly qualified teachers that are able to discern the growth of a student. Tests are great tools, but an involved teacher can often find the trouble areas before the test could.</p>	<p>Steven Walker</p>	<p>Purposes of</p>
<p>How does the 70% in reading and 75% in math of year 1 compare to the CMS school district?          Is this realistic when compared to the surrounding schools you will be pulling from described in the application as low performing?          What information or criteria was used for percentages for special education and EL students?          How do you define minorities?          By stating you are locating near the UNCC campus you are targeting a diverse population and choosing a method that promotes individualization, why do you project a 15 point achievement gap?</p>	<p>Buffy Fowler</p>	<p>Goals for th</p>
<p>Why lower standards specifically for exceptional children and minorities?          Section detailing professional development growth goals is very confusing.          Goals in general lack specificity and measureable terms.</p>	<p>Sherry Reeves</p>	<p>Goals for th</p>
<p>If Reading or Math targets are not met, what adjustments will be made? How are surrounding schools performing?</p>	<p>Brian Smith</p>	<p>Goals for th</p>
<p>The professional growth goals are not specific or measurable. There is no discussion of how the school will link PD with student outcomes. Instead, the focus is on attending and providing PD with no mention of how to measure the effectiveness of the PD, or how it will be followed up on or implemented. The PD "goals" are not aligned with the classical logic, rhetoric, grammar approach so there is not way for the school to measure the effectiveness of the instructional program as a whole.          The financial goals for the board are not measurable or reasonable in light of its fiduciary duty. The financial goals for the school are not measurable or specific and include no fiscal or financial targets. There is a significant lack of intentionality and understanding of what are the most critical financial measures to have in place for the school and the board(i.e. cash on hand, clean audits, strong internal controls, debt management etc). Please describe the board and school level goal setting process. The process the board intends to use to monitor academic and school level goals is insufficiently comprehensive and lacking in</p>	<p>Tracy Kelley</p>	<p>Goals for th</p>

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<b>fundamental details like targets, process, training, desired outcomes, strategic planning, accountability structures etc.</b>		
<b>Attainable goals and I like the use of MAP testing so that Board can also keep track of the academic progress that the teachers are seeing in the classroom.</b>	<b>Steven Walker</b>	<b>Goals for th</b>
<b>What is the justification for delaying differentiated/personalized professional development until year 5? Are instructors expected to receive the same training for the first 4 years?</b>	<b>Avril Smart</b>	<b>Goals for th</b>
<b>Can the applicant provide and discuss available data (baseline) on target population to establish "attainability" of goals?</b>	<b>Kevin Piacenza</b>	<b>Goals for th</b>
<b>Clearly Classical focused in this section. MAP testing is a solid measuring tool.</b>	<b>Anthony Helton</b>	<b>Goals for th</b>

<b>Reviewer</b>	<b>Score</b>
Glenn Allen	
Steven Walker	Pass
Anthony Helton	Pass
Tracy Kelley	Fail
Avril Smart	Pass
Brian Smith	Pass
Deanna Townsend-Smith	
Tammi Sutton	
Robert McOuat	
Sherry Reeves	Pass
Kevin Piacenza	Pass
Buffy Fowler	Pass
Becky Taylor	
Phyllis Gibbs	

### III. EDUCATION PLAN

(No more than ten total pages in this section)

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

#### **Instructional Program:**

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

BCCA will provide students in K-8th grades with a high quality, sequential, rigorous, and comprehensive classical education intertwined with the Common Core guidelines. A Classical Education is based on the concept of the trivium, or "three roads," which speaks to the structure of every subject and discipline. The trivium model describes three stages grammar, logic, and rhetoric which follow the developmental growth of children from their ability to memorize information to giving a name to everything in their world to becoming argumentative, looking at the big picture, and expressing thoughts and opinions.

Anytime a person learns something new they naturally progress through these stages of learning. As new information is acquired, an individual begins to process it logically and make judgments. These stages are performed at all ages and by all learners. Classical Education, from a research base, is most closely aligned with Cognitivist learning theories. These theories postulate that children generate knowledge and meaning through sequential development of an individuals cognitive abilities, such as the mental processes of recognize, recall, analyze, reflect, apply, create, understand, and evaluate. The Cognitivists' (e.g. Piaget, Bruner, Vygotsky) learning process is adoptive learning of techniques, procedures, organization, and structure to develop internal cognitive structure that strengthens synapses in the brain. The learner requires assistance to develop prior knowledge and integrate new knowledge. The purpose in education is to develop conceptual knowledge, techniques, procedures, and algorithmic problem solving using Verbal/Linguistic and Logical/Mathematical intelligences. BCCA will focus on teaching methodology that enhances learning opportunities including direct instruction, cooperative learning, and inductive instruction. To enhance learning in the middle school years, students begin to synthesize and evaluate new learning through teacher modeling, Socratic circles, reflection and task structuring. Design Thinking is based on resolving real-life cases through group analysis and brainstorming. Mind Maps are a common technique for exploring self-learning.

Research shows that inquiry-based instruction has considerable advantages in the classroom. Students in regular and special education classrooms have the opportunity to develop problem-solving and reasoning skills through concrete, hands-on science activities that make up inquiry-based instruction. The National Science Education Standards advocate the use of inquiry teaching, using such methods as posing questions, examining data, planning investigations, collecting and interpreting data, and proposing explanations (Varma et al., 2009).

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

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

The basic learning environment will be classroom-based with class sizes of 22-23 in the K-2 and 23-25 in the 3-8th. BCCA's elementary school's basic learning environment will be a safe, positive, and clean atmosphere to learn, explore, and reach their individual potential. The faculty and staff are driven by a moral and ethical imperative to create a learning environment where teachers can teach and students can learn. We believe that all students want a rigorous and structured educational experience. By fully developing the mind, body and spirit of the students, they will become better citizens, better consumers, and more productive citizens in the community in which they live.

On a typical elementary school day, morning hours will be devoted to reading, language, and math, with integrated content from the sciences and social studies when meaningful. Active engagement in learning will be encouraged with best instructional practices to make learning interesting and exciting. Social studies and science will be explicitly taught and integrated with the reading, language arts, or math. Writing will be an important component of English/Language Arts, and skills will be applied across the curriculum. Hands-on, interactive learning will be encouraged across all subject areas as appropriate. Recess and special-area classes such as art, music, foreign language, physical education, and/or media offer subject learning and enrichment opportunities for the whole child, and support and enrich the Core Knowledge curriculum. Students may participate in after school activities such as sports, clubs or tutoring.

The 6-8 grade typical Reading Block for middle school students may include approximately 30 minutes of teacher-led reading from classical literature with the teacher and students taking turns reading aloud. During the last 20 minutes the students tie previous knowledge to the newly read material and make connections across the curriculum. The remaining time is spent with a teacher-led discussion (Socratic method) with students practicing rhetoric and logic. Learning to form opinions from reading classical literature and learning how to support those ideas along with rigorous high school/college prep, inquiry, collaboration, organization, and reading to support academic growth are relevant parts of the reading block.

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.*

Research shows that primary reading instruction in grades K-3 is vitally

important to future successes in the area of reading. However, good research-based practices shows that reading instruction must continue after the primary grades as text and content increase in difficulty. The idea that all teachers are "reading teachers" is more than a mantra, its a necessity. The Spalding Reading program equips students with the explicit basic skills they need at the elementary level to be able to succeed at the middle and high school levels. When academic literacy skills are taught, explicit instruction should be provided. Explicit instruction involves direct teaching including teacher modeling, guided student practice with feedback, and independent student practice (Marchand- Martella & Martella, 2013; National Institute for Literacy [NIFL], 2007). Biancarosa and Snow (2006) and Kosanovich et al.(2010) list explicit instruction as the chief way to promote student learning. This systematic instructional process provides a framework for the gradual transfer of responsibility for student learning from the teacher to the student as the student becomes increasingly successful(Marchand-Martella & Martella, 2013). Each step of comprehension (i.e. strategies, monitoring and metacognition, teacher modeling, scaffolding, and apprenticeship)requires the use of explicit instruction by teachers in order to be successfully implemented by readers (Biancarosa & Snow, 2006). The key to explicit instruction is ongoing interaction and communication between the students and the teacher (Rupley, Blair, & Nichols, 2009). Only then can students learn to comprehend, understand, and interact with written text. Spalding puts great emphasis on word study and fluency early on as deficits in word study negatively impact students' comprehension, vocabulary, and fluency (NIFL, 2007). Once achievement in word study has been achieved, instruction is augmented to finely integrate grammar and syntax, creative and organizational composition skills, and vocabulary development, which points out the relevance to that which the student already knows. Roots, prefixes, suffixes, homophones and homographs, antonyms, synonyms and graphic organizers to provide for a high-expectation, skills-based, complete language arts method designed to accompany any the vocabulary-rich literature of the Core Knowledge curriculum.The curriculum aligns with U.S standards, but there are major differences in the delivery compared to standard American teaching methods. Traditionally about 30 math concepts can be covered in one year using a spiral approach that introduces concepts and revisits them with added complexity. This method does not expect mastery, leaving some students bored when a concept is revisited, and moving on before its fully grasped by other students. If a concept is not fully internalized, its understandably difficult for a student (or his teacher) to pick up exactly where his progress laststood. In contrast, Singapore Math covers 10-14 concepts a year, stays with each 2-3 weeks, and expects mastery before introducing a new lesson. Singapore Math understands that there are multiple learning styles and ELL students will benefit from the programs clear and simple explanations of math concepts. With fewer topics and more time to thoroughly learn those topics, the programs detailed instruction, questions, problem solving, and visual and hands-on aids (blocks, cards and bar charts) ensure that students master the material. BCCA uses the Core Knowledge Sequence, as its guiding curriculum in core academic areas K-8 while aligning with the NC Accountability Model. The Core Knowledge Sequence, partnered with Spalding, Singapore and FOSS meets or exceeds the guidelines set forth by the NC Accountability Model. If an exact alignment does not exist, BCCA's administration and teachers will create or supplement the curriculum to ensure alignment.

4. *Describe the primary instructional strategies that the school will expect teachers to master and*

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*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.*

Teachers will use direct questions to help students understanding of problems and solutions (The Socratic Method). Teachers will use primary source documents such as letters, diaries and memoirs in order to bring history to life and provide insight and understanding to historical events. Classical virtues of self-command and self-sacrifice will be integrated throughout the curriculum in all grades. Standards of excellence represented in citizenship, cooperation, courage, honesty, integrity, perseverance, respect and responsibility as the guiding standards of behavior will be displayed throughout the school. Students will be taught study skills such as time management, note-taking, organizing, memory techniques, outlining and research methods.

These methods and more will help provide students with a rigorous and comprehensive education that challenges them to excel in both learning and character. For those students with major deficiencies due to a weak education or other reasons, the classroom teacher along with support staff will implement remediation strategies which may include additional tutoring and modified assignments for the purpose of bringing the student to grade level. Parents will also be involved in the remedial strategies.

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

The goal of assessments at BCCA is not to point out what a student does not know, but to encourage each student to learn, while providing each student with as many opportunities as possible to demonstrate improvement. The student learning is assessed in all core subjects as each student progresses from Kindergarten through the 8th grade. The internal assessment system is a comprehensive set of assessments, both formative and summative to capture as many aspects of each students learning as possible. The effectiveness of the curriculum is measured by the student achievement of the specific measurable objectives for the first year of operation. Expectations are that students will progress as well or better than they did before attending the charter school, and that the specific measurable objectives for BCCA are achieved from year to year. This information is shared with students, teachers, parents and administrators.

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

BCCA will use a traditional calendar type. The decision to utilize the traditional calendar was arrived at (and to our surprise) after our May Board meeting in which we reviewed the research on the subject from one of our teachers and the strongest advocate for a year round calendar. Accordingly, we decided to utilize the traditional calendar. The proposed calendar has been designed to provide students with the opportunity to learn

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content included in the school's curriculum while also providing instructional staff with the support and professional development time that they need to grow as teachers. The calendar meets the number of hours and days required by the state for a complete school year. The calendar reflects the school's commitment to academic excellence by including 185 instructional days, or 1,025 hours of instruction. When possible, BCCAs calendar will be aligned with the local LEA's calendar to accommodate families who may have students in more than one school. The start date will be no earlier than the Monday closest to August 26 and end date no later than the Friday closest to June 11. The local board will designate two workdays on which teachers may take accumulated vacation leave. This calendar, which outlines both the learning opportunity for students as well as the professional development opportunity for teachers, is intended to align with our mission of placing each student on the path to college readiness and support the school as it works to build the desire for life-long learning using framework of the classical curriculum.

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

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

The classical curriculum has a proven track record of success for lower level learners. The curriculum is designed with differentiation in mind and lends itself to individualized instruction and to closing the gaps between high and low level achievers. The assessments are built into the curriculum and provide formal assessment of the student. Coupled with the use of informal assessments throughout the year, teachers can constantly monitor the growth of individual students. Students needing assistance will be supported by caring teachers, peer tutors, an expanded tutoring plan after school and assistance in other subjects by utilizing reading in the content area techniques and aides.

Both the Spalding program and Singapore Math are designed to meet the individual needs of all students. spalding is a multi-sensory program that assesses where students are functioning, and offers highly targeted instruction in all grades, K-8, as needed. It has been used in the past to both prevent and correct learning disorders. It was patterned after the Orton-Gillingham model of reading instruction for students who may be dyslexic. Skills are presented in a specific order with opportunities for repetition. Students are assessed continually to determine mastery of skills.

Additionally, the effectiveness of the ESE program will be monitored and evaluated by providing and requiring participation of the EC teachers, and the general education teachers in professional development opportunities, that focus on writing successful IEPs, the use of research based instructional strategies for special education students, implementing accommodations in the general education classroom, and modeling how to analyze the effectiveness of student goals. This will assist each ESE teacher and any other staff member who assists in servicing special education students in understanding how to track the progress of their students.

Singapore Math is effective in addressing individual student needs as well.

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It lends itself to differentiation because of the three stages of learning contained in the materials: concrete, pictorial, and abstract. Students are continually assessed, so teachers know which students are ready to move throughout the stages. Students at the more concrete level are allowed to stay at that stage longer, with tools such as manipulatives, to assist in learning.

Planned services that will be provided as procedural safeguards to serve the needs of the exceptional students who enter below grade level include: Students will be mainstreamed into regular education classes. Those EC students who require extra attention will be pulled out for specialized instruction by a certified EC teacher, reading and/or math specialist. The amount of pullout will be determined by their Individualized Education Plan (IEP), as will the specific skill and content area to be remedied. Consultation and collaboration will be provided for those students who can succeed without the assistance of pullout but need extensive monitoring. A speech therapist will either be on staff, or contracted out, depending on the number of students requiring speech therapy as per their IEPs. Physical and occupational therapy will be contracted out as needed. Instructional materials and learning seminars will be made available to parents, family members and other volunteer tutors so they will know the best methodology to use with learning disabled or exceptional disabilities children. Weekly consultations with teachers will be held to ensure that appropriate modifications are occurring during instructional activities and teachers are providing the appropriate test modifications. A tutoring schedule will be provided for study skills and/or frustrations in the classroom. Professional development opportunities will focus on writing successful IEPs, the use of research-based instructional strategies for exceptional students, and implementing accommodations in the classroom.

## *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.*

All students enrolling in BCCA are given a registration packet that includes the Home Language Survey (HLS). The parents response to the survey will indicate whether their child is a potential ELL student. These students will be screened within ten days of entry into the school for aural/oral language proficiency. Ballard & Tighe assessment materials will be used to determine Listening, Speaking, Reading and Writing proficiency. (<http://www.ballardtighe.com/>). BCCA will use other methods of identifying ELL learners such as teacher observations and interviews, achievement tests, review of student records, parent information, student course grades, and alternative assessments such as the cloze procedure or dictation. ELL students who

enter the school with an IEP will be placed in the appropriate level of subjects in the mainstream classroom. Singapore Math has been used very successfully with students who are English Language Learners due to its pictorial stage (in between concrete and abstract). Spalding Reading program begins at the students speech and oral comprehension levels. It allows students to build one skill upon another, always moving from the known to



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the unknown. Students are presented with a limited number of concepts or information in a given period of time. They then practice these concepts in a variety of ways until mastery is achieved. This method serves ELL students in a well-sequenced manner. The core content teachers will implement the strategies delineated on the standardized lesson plan as well as ongoing professional development will equip the teachers to understand the types of issues that their ELL student may be facing as they adjust to a new country. Students will have access to intensive reading and math classes, a paraprofessional to provide support, and the after school tutoring class for one-on-one or small group sessions.

Students must be kept in the ELL program only as long as needed for them to develop adequate English skills to allow them to meaningfully participate in regular instruction. Students who may be eligible for exiting the ELL program should be tested with an objective assessment that has been validated for this purpose. Students are tested annually at the end of the year unless a teacher or parent requests another time of the year. BCCA will monitor the academic performance of former ELL students for two years following their exit from the program to make sure they can meaningfully participate in the regular educational program.

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.*

BCCA will identify gifted students and provide them additional challenge in their educational program. All second grade students who are educated primarily in a BCCA general education classroom will be screened with a nationally-normed aptitude test (at 87% or higher) and the Talent Development Identification Rubric (overall score of 12) to be eligible for further screening. For third through eighth grades, a classroom teacher, parent, family advocate, and/or counselor may refer a student who exhibits extraordinary strengths in academic performance. In order to be identified, an accumulation of 12 points on the Talent Development Identification Rubric must be accumulated using age-composite scores from a nationally-normed aptitude test or an NC End-of-year assessment. The Talent Development School-Based Committee will be comprised of the TD Catalyst teacher or an Academic Facilitator, a classroom teacher(s), a counselor and/or an administrator. Each gifted child will have a custom Gifted Educational Plan which notes areas of present academic performance, a defined set of goals, instructional objectives, specific services required, objectives and evaluation procedures. Flexible groupings will be used in third grade and higher to accommodate students' needs and interests. Teachers will practice modeling thinking strategies, posing higher level thinking questions, expanding on students' ideas or suggestions, and explicitly pointing out rules and relationships. Enhanced lesson plans will require teachers to use best researched strategies (which concluded that these strategies work well for ALL students) such as inquiry-based learning, differentiating the process, product or learning environment, learning contracts, tiered assignments at various levels of complexity, depth and abstractness, and enrichment strategies such as learning centers or mentorships. The Gifted Educational Plan is developed with parental

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participation. The

Gifted Educational Plan is periodically reviewed and modified appropriately per the students academic performance. The School has faculty with Gifted certification to ensure the Gifted Educational Plan is meeting the needs of the student. Advanced classes are offered in middle school to allow for accelerated learning. The Schools classical curriculum employs curriculum components that provide various levels of academic challenge such as Singapore Mathematics and Core Knowledge American History, World History, Geography, Science, Music and Art. BCCA will develop a written AIG school plan reflecting best practices and be aligned with BCCA's strategic plan. It will be written in accordance with state legislation and SBE policy, which is approved by the school's board and will be sent to SBE/DPI for review and comment. The TD school-based committee will monitor and evaluate the gifted program by matching the specific curriculum objectives to the standardized tests, performance-based tasks, and portfolio approaches. Students may advance more than one grade based on review of performance and ability criteria. Students may be advanced in one subject area and accommodated flexibly by advanced curricular placement. Monthly committee meetings will be held to review formative data and that the gifted program is in compliance with state standards (currently under revision). Quantitative and qualitative data will be collected and compiled. That disaggregated data will be presented to BCCA's board on a yearly basis.

### **Exceptional Children**

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

### **Identification and Records**

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

1. As part of the enrollment process, parents will be asked about any services their child received at a previous school or any diagnosis that may affect the child's learning. BCCA will request all student records including all academics, IEPs, 504s, and psychological test results from the previous school. BCCA will comply with all federal and state guidelines concerning the education of students with disabilities including the Individuals with Disabilities Act (IDEA) and section 504 of the Rehabilitation Act.

2. In compliance with the federal Child Find mandate, BCCA will identify and evaluate all students who either have or are suspected of having a need for

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special education services. BCCA will document the students data in order to demonstrate well-delivered, scientific, research-based instruction and interventions addressing the identified area(s) of concern and delivered by qualified personnel in the general education setting. These interventions will be based on the Response to Intervention (RtI) process. If interventions at Tier III of the RtI process are not working, an IEP team is formed that must include the general education teacher, EC teacher, administration, psychologist, parents, and anyone else pertinent to the team (speech pathologist, guidance counselor, reading specialist, student if appropriate). The team needs to agree that further testing and an IEP may be needed for this student. Once parental consent for testing is obtained, BCCA will ensure that the initial evaluation is completed within 60 school days (cumulative). When all testing is completed, another meeting of the team will take place to determine eligibility based on the results of the psychologists formative assessments. Placement of the student in EC services will be in the least restrictive environment. All communication and correspondence between BCCA and parents will adhere to the protection and privacy guidelines found in the Family Education Rights and Privacy Act (FERPA).

3.a) Within 30 days of enrollment at BCCA, records will be requested from the students previous school including: all academics, attendance records, IEPs and supporting documents, and/or 504 accommodation plans.

3.b) All student records at BCCA will be kept confidential in accordance with the

FERPA and IDEA mandates. Files will be kept in a locked facility and authorized personnel will be granted access to said records.

3.c) All required student records will be prepared, retained, and disposed of in compliance with federal and state statutes.

### Exceptional Children's Education Programming

- 1. Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
- 2. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*
- 3. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
- 4. Describe the proposed plan for providing related services.*

1. BCCA will comply with IDEA and provide accommodations and services for any exceptional child based on the child's IEP. All exceptional students will be educated in the least restrictive environment but will have an EC resource room available for pull-out, one-on-one instruction, or to allow for other services. Highly qualified and certified EC teachers will be on staff at BCCA.

2. BCCA will provide each student with a disability a free appropriate public education (FAPE) in the least restrictive environment. The school will provide a special education program with a variety of services designed to meet the needs of all students. BCCA will follow the inclusion model unless the severity of the disability warrants otherwise. Placement will be in accordance with LRE provisions. A speech/language therapist will either be on staff or contracted out. Physical and occupational therapy will be contracted as needed.

3. EC teachers will monitor students with disabilities in accordance with

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the goals specified on the IEP. Updates will be made to parents via quarterly progress reports. EC teachers will collaborate with classroom teachers to ensure student progress. IEPs will be reviewed annually with a re-evaluation every 3 years.

4. Speech /Language pathology, audiology services, interpreting services, psychological services, physical and occupational therapy will be provided as needed using contracted companies with qualified providers.

### **Student Performance Standards**

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

1. BCCA is committed to creating an environment of learning which will allow each student to attain at least one year of academic growth of the Common Core State Standards and the NC Accountability Model standards each school year. Our goal is to challenge students at all levels of learning while sustaining measured growth throughout the academic year. Through ongoing professional development and continued training, our teachers will be constantly learning new methods for helping their students succeed and implementing these new learning strategies for all their students.

2. BCCA will administer all NC mandated tests to ensure proper student growth.

Other non-curriculum assessments may include but are not limited to:

- \*Scholastic Reading Inventory (grades 2-8; beginning and end of year)
- \* Dynamic Indicators of Basic Early Literacy Skills (DIBELS) (K-3)
- \*Diagnostic Assessment of Reading (DAR) (K-5)
- \*Student projects, class work, presentations, and on-going portfolios
- \*Teacher-developed pre- and post-assessments
- \*Spalding Writing Road to Reading assessments
- \*Singapore Math Assessments

3. Students will be promoted based on classroom performance, EOY assessment results, attendance, and teacher recommendations. A team that includes teachers, parents, administration, and anyone else deemed appropriate will make decisions regarding retention. Students with disabilities following the general education curriculum must meet the state or district level of performance for student progress unless the students IEP team has determined that the student should follow a modified curriculum aligned with exceptional student education course requirements. BCCA will use a quarterly reporting schedule that will coincide with Parent-Teacher conferences. All student grades will be reported using an online grade book assessment tool.

4. BCCA will begin with grades K-2 and add subsequent grades each year. As grade/courses are added, teachers and administrators will ensure course alignment with state guidelines. Promotion requirements will be monitored using assessments, attendance records, and teacher input. BCCA will seek

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qualified volunteers to work with "At Risk" students. Tutoring will be coordinated with the classroom teacher and the volunteer. Student progress will be monitored to determine the effectiveness of the interventions and the need to use new strategies.

### **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.*

BCCA places a strong emphasis on virtue and the building of character in all students. BCCAs goal is to create a safe, respectful and responsible environment where learning takes place. Discipline policies and procedures are designed to provide guidance and direction on responsible and acceptable behavior. The discipline model is designed to teach students appropriate behavior, attitude and response in all situations and develop a sense of self-governance. The schools teachers and administrators will set the tone on virtuous behavior. Virtuous behavior will also be reinforced in the classroom during instruction when appropriate. Classroom Management: <http://www.dailyteachingtools.com/champsclassroom-management.html> BCCA utilizes elements of researched-based methods and techniques based on the CHAMPS model. This model is designed to create an instructional environment in which students are responsible, motivated and highly engaged in assigned specific tasks. Key elements of the CHAMPS method include:

Conversation: Can students converse during this activity? About what? With whom? For how long?

Help: How do students get your attention for help? How do students get questions answered? What should they do while they wait for you?

Activity: What is the expected end product of this activity? What is the task or objective?

Movement: For what reasons can students get out of their seats during this activity? Do they need permission to do so?

Participation: What behavior shows that students are participating or not participating?

Success: There are no questions for this one. When CHAMPS expectations are met, students will be successful.

New teachers will receive an Induction in practices and procedures that lead to a positive classroom environment. A new teacher will also be assigned to an experienced mentor teacher to receive support and training on best practices. Also, throughout the school year there will be periodic Teacher Learning Communities to gain from the experience of others.

Student Discipline Philosophy - The Schools goals of discipline are to:

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Maintain a highly effective learning environment where students focus on gaining knowledge with as minimum distractions possible. Utilize the need of discipline as a rich opportunity for students to learn about themselves and others, and to provide students with actual character education. Reinforce the Schools commitment to treating all students with fairness, respect, and equality.

BCCA will follow the District's Code of Conduct for discipline, suspension, dismissal and recommendation for expulsion. At the beginning of the school year, each student and parent will receive the School's Student Code of Conduct. School specific procedures will also be published in the Student's Code of Conduct Handbook.

In accord with the requirements of the Individuals with Disabilities Act (IDEAL), the School ensures that special needs students who require additional behavioral help are supported. The school acts proactively in identifying and supporting special needs students with behavioral needs. [www.doe.in.gov/sites/default/files/specialed/ideafaq.pdf](http://www.doe.in.gov/sites/default/files/specialed/ideafaq.pdf)

Major student infractions include disrespect, cheating, having a weapon on campus, having drugs on campus, property damage, sex offenses, fighting, skipping school and theft. Discipline options for major infractions include:

After School Administrative Detention In School Detention

After School Teacher Detention Principal or Designee Conference

Out of School Suspension Community Service

Work Detail

Expulsion

A Principal or designee has the authority to suspend a student as appropriate. The Principal will utilize the Districts due process guidelines. A suspension will last from one to ten days. All suspensions require a parent-principal conference to prepare a discipline plan before the student is to return to the School. Parents will also be notified in writing within 24 hours of suspension by mail.

<b>Section III: Education Plan Concerns and Additional Questions</b>		
A good explanation of the classical model.	Steven Walker	Instructiona
How does the classical education model align with Common Core standards?	Sherry Reeves	Instructiona
How does can the applicant make the connection between this approach and high risk student populations or students of color explicit? How does the assessment strategy align with the classical instruction approach and the stages of the child's development? Where are learning benchmarks assigned on the learning trajectory?	Avril Smart	Instructiona
The response does not include an articulation of the proposed assessment strategies that the school will use to confirm that students are learning and the instructional program is effective or needs to be adjusted to fit the specific needs of the student population. There is no documented evidence to support that the classical triduum approach will have a direct and meaningful impact on student learning for the targeted stud population. Describe the 3 main instructional strategies (inductive instruction, cooperative learning, direct instruction).	Tracy Kelley	Instructiona
How will the 4 teacher assistants be used spread across 9 classrooms? Explain more about how an individualized program will be implemented in classrooms of 23 students with only 4 teacher assistants. What are the number of instructional hours represented in the calendar in the appendix?	Buffy Fowler	Curriculum a
Application initially indicates that the school will operate on a year-round model but attached calendar is based on a traditional model. Which is correct? Statement about remediation strategies for "weak" students is unclear. Are there specific strategies within the classical model designed to bring students with deficiencies to grade level? Explanation of how instructional plan will ensure students are ready to transition from grade to grade is quite confusing. (goal of assessments is not to point out what a student does not know, but to encourage each student to learn; students will progress as well or better than they did before attending the charter school).	Sherry Reeves	Curriculum a
While the class size may seem a little high at first glance, I have seen this size work in other schools that employ a similar model as described here.	Steven Walker	Curriculum a
Where is the model currently being used and what are the results with a population like the stated target population? Can an existing program or other resource be used for identifying possible pitfalls, best practices for daily routines, schedules, etc.? Are the various elements cited (Singapore Math, Spalding Reading, Touchstone, Foss etc. typically used in similar classical programs? How did the applicant decide upon these?	Kevin Piacenza	Curriculum a
Given the subjectivity of the guiding principle, how can teachers measure their own understanding of the instructional approach and education plan?	Avril Smart	Curriculum a
What research was used to arrive at the usage of traditional calendar over a year round calendar? How are Spalding, Harvey, and Touchstone discussion project aligned? How will you know whether the students did better before coming to the charter school since most students are beginning with you? What professional development will be given for inquiry-based or classical instruction? Will FOSS be used for At-Risk students? What professional development will be provided for FOSS?	Brian Smith	Curriculum a
Please describe how core knowledge will integrate with the classical grammar, rhetoric, logic approach and Socratic method, Singapore math, Spalding, and FOSS curriculum frameworks and why they were selected and the selection process and how each decision will have a positive impact on student learning for the target population. Overall, the curriculum and instructional design of the proposed school is a cacophony of disconnected instructional tenants without cohesion or foundational basis for selection. The response does not present a theory for how best to educate at risk students, ELL, or struggling tier I learners. The response provides educational jargon that is neither clear or concise.	Tracy Kelley	Curriculum a
Who will make the final decision on placement, advance placement, and retention/promotion of the students?	Brian Smith	Special Prog
Provide specific research that demonstrates how classical model is successful with lower level learners.	Sherry Reeves	Special Prog

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How has Spalding program been used to "prevent and correct learning disorders"? Information provided in the Special Programs and At-Risk students section indicates lack of knowledge about special education, 504, EL, and AIG programs.		
The description goes directly into students being served by EC teachers. Can you describe the steps put in place before students are identified EC or don't qualify for EC services? The programs mentioned are the same programs identified for all students, what other strategies will be used with students that are struggling? Are you familiar with the ELL testing in place within the accountability department in the NC public schools? The test mentioned is a different test than what is used in NC public schools to identify ELL students.	Buffy Fowler	Special Prog
The schools plan for how it will support students not on track to proficiency in math and ELA is incomplete. There is no evidence that time within the school day will be set aside for individualized support. Overall, the response does not describe the structures necessary for how the school will provide a tier level of instruction, a data driven approach to prevention or early detection, and support for students who experience learning r behavioral challenges, including ELL and students with disabilities. Please clarify acronyms used without definition including, EC and ESE. Please describe the type of informal assessments will be used to progress monitor through the school year. How will this be tracked? Applicant needs to clarify what is meant by "Students needing assistance will be supported by caring teachers, peer tutors, an expanded tutoring plan after school and assistance in other subjects by utilizing reading in the content area techniques and aides." What specific system will be in place to progress monitor; what specific data will be used from this system to drive instructional decisions throughout the process? Within this system of interventions, what structures or process will be put in place to move students along a continuum of services and change placements according to identified progress or needs. The response does not provide a research based intervention plan that includes flexible tiers to supplement or enhance the curriculum for tier I students needing additional supports. Please provide an explanation of what is intended by the statement "Students are assessed continually to determine mastery of skills."  Overall, the responses in this section provide very few details as to how the school intends to provide tiered instruction and adequate learning time. There are too few details and little information to suggest that the team has the level of understanding necessary to have a positive impact on student achievement (i.e. ELL assessment)	Tracy Kelley	Special Prog
Are there specific intervention "trigger points" and steps associated with the approach?	Kevin Piacenza	Special Prog
What is your plan for identifying at risk students that are not already identified as a student with disability? What is the process for identifying and monitoring their progress while receiving intervention(s)?	Glenn Allen	Special Prog
Clarify evaluation separate than monitoring. What data is gleaned from evaluation and how does that filter into selecting instructional strategies?	Avril Smart	Special Prog
The response indicates a basic understanding of how records should be kept but there is no discussion of the requirements for 504 plans and accommodations.	Tracy Kelley	Exceptional
Explain more about the RTI process that will be used to identify students with disabilities. Tier III was mentioned, what happens prior to Tier III	Buffy Fowler	Exceptional
"Once parental consent for testing is obtained, BCCA will ensure that the initial evaluation is completed within 60 school days (cumulative)." Policy 1503-2.2 states (c) Timeline for initial referral. (1) Evaluations must be conducted, eligibility determined, and for an eligible child, the IEP developed, and placement completed within 90 days of receipt of a written referral "Within 30 days of enrollment at BCCA, records will be requested"--Could this result in delay of providing FAPE to students with disabilities that could result in providing compensatory education?	Glenn Allen	Exceptional
3.a. Is a 30 day information request window aggressive enough to expedite the exchange of student profile information in support of immediate and accurate placement at the beginning of the academic year?  How the the overall guiding principle of the charter school aligned with curriculum/instruction for exceptional children?	Avril Smart	Exceptional
This is a very boilerplate response. It does not align with the overall educational model	Tracy Kelley	Exceptional



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described. There are virtually no details provided that illicit confidence that the group understands and appreciates how services for EC students will mirror general education services. There is no mention of the classical model and how it translates for EC students. There is no mention of groups core beliefs about educating EC students and how the primary instructional strategies will also be used to support EC students. The response does not show how the EC plan will align with the overall proposed curriculum, methods, or school mission.		
"BCCA will use a quarterly reporting schedule that will coincide with Parent-Teacher conferences." - How will this feedback be communicated? How does the "report card" provide feedback in concert with the 'Classical' model?	Kevin Piacenza	Student Perf
What steps will be taken to assess students beginning competencies in order to assess and project benchmarks for growth? What is the plan for curriculum development to accommodate the addition of new grade levels each year?	Avril Smart	Student Perf
I would like to hear more about 1. I do not think the current answer is sufficient standing alone but I do think that other portions of the application explain the process of how the school will measure student achievement on an ongoing basis.	Steven Walker	Student Perf
The response does not align with previous sections (i.e. Goals section) indicating NWEA MAP would be used by the board to progress monitor student achievement. Will the school use NWEA to monitor student achievement and will it also inform instructional decision making process (i.e. interventions)? Applicant responses in this section are not clear, specific, measurable, attainable, time specific and do not denote high expectations for student achievement. Promotion standards appear to be very subjective and arbitrary. Please expand on what is meant by "classroom performance" how will the school develop norms for promotion decisions? What additional performance data will be used to make this decision other than EOY state assessments? How will parents be informed of student progress if their is a problem will they find out only at the end of the year? How will teacher generated pre and post assessments be normed to ensure high levels of rigor? Overall, the education plan and specifically the goals do not support the overall academic goals outline in question 2 and neither do the promotion policies. What mission specific goals will the school use to assess effectiveness of the overall program?	Tracy Kelley	Student Perf
Who will make the final decision on retention/promotion of the students in case there is a tie within the team?	Brian Smith	Student Perf
How do the goals in question one relate to the goals listed in the Mission, Purpose, and Goals section. If percents of students on or above grade level is predicted to increase each year then doesn't that mean some students will need to show more than a year's grow?	Buffy Fowler	Student Perf
Why would you adopt the district's student code of conduct? Shouldn't you create your own that is aligned to the principles of classical education?	Sherry Reeves	Student Cond
Explain more about individual student behavior development. The Champs model appears to focus on the role of the teacher, how will discipline issues be handled on a daily basis?	Buffy Fowler	Student Cond
A complete review of the classical model. A clearer, strengthen section on how you will measure success across the board	Anthony Helton	Student Cond
What is the District Code of Conduct for discipline? Is that different from the Students Code of Conduct Handbook?	Brian Smith	Student Cond
The student management system does not align with the overall mission and proposed education plan. Use of CHAMP and its components lack cohesion and the discipline plan is not aligned to overall mission and key design elements of classical education i.e. virtues, character development, philosophy.	Tracy Kelley	Student Cond
Describe how the district code of conduct align to classroom management strategies? How are behavioral/discipline issues elevated?	Avril Smart	Student Cond

Reviewer	Score
Deanna Townsend-Smith	
Buffy Fowler	Pass
Sherry Reeves	Fail
Tammi Sutton	

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Brian Smith	Pass
Tracy Kelley	Fail
Steven Walker	Pass
Becky Taylor	
Robert McOuat	
Avril Smart	Pass
Glenn Allen	
Phyllis Gibbs	
Kevin Piacenza	Pass
Anthony Helton	Pass

**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:* Bonnie Cone Classical Academy

*Mailing Address:* 4205 Quail Hunt Lane

*City/State/Zip:* Charlotte NC 28226

*Street Address:* 4205 Quail Hunt Lane

*Phone:* 704-763-0065

*Fax:*

*Name of registered agent and address:* Martin McCarthy  
4205 Quail Hunt Lane  
Charlotte NC 28226

*FEDERAL TAX ID:* 46-4248852

**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 D)  
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>

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William Mills	Treasurer	CABARRUS	Attorney		
Brian Lisk	Board member	GASTON	educational consultant		
Louise Baucom	Board Chairperson	MECKLENBURG	Retired Professor of Education/ UNCC		
Judy Russo	Board member	MECKLENBURG	Retired teacher / CMS		
Lynne Bradley Hiltz	Board member	MECKLENBURG	non-profit grant writer		
Marty McCarthy	Secretary	MECKLENBURG	retired pastor		
Stephanie Newbrough	Board member	MECKLENBURG	Teacher / CMS		

**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.*

Guided by the NCGS 115C-238.29E(d) the primary function of the Board of the Bonnie Cone Classical Academy (BCCA) will be to "decide matters related to the operation of the school, including budgeting, curriculum and operating procedures." The Board has been established in conventional fashion with non-compensated officers and directors and shall operate in accord with the bylaws. The Board will retain final authority for decision making pertaining to policy, procedure, financial, curriculum and other operating, instructional and non-instructional matters. The Board knows the boundary between governance and management. The Board will work closely with the Head of School in determining best practices and proper delegation of management issues. The Head of School will be hired by the Board after careful review of the candidate's qualifications, goals, track record and integrity. The Head of School will be subject to an employment agreement guiding expectations, authority, responsibility along with guidance pertaining to relationships with the Board and their staff. The Head of School will be evaluated annually by the Board (with possible engagement of relevant committee input) via a process that will include all stake holders in both official and unofficial feedback surveys. The evaluation will include a quantitative and qualitative analysis of academic, financial and operational performance. The Board may also use established, market based tools such as the Marzano Leadership Evaluation Model to evaluate its Head of School.

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*

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*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.*

BCCA currently has a Board membership of 7. We hope to expand our areas of professional expertise in the growth of the Board, which we would like to see number either 9 or 11 (adding a business owner, and an HR professional) once we are further developed. We are seeking persons with a range of professional qualifications and strong evidence of personal commitment to public education and civic engagement. The persons we seek have evidenced strong ability to govern with a constant eye on the mission of their organizations. The Board will be charged with all governance matters that include organization life and continuity, pedagogical excellence, risk management, community outreach, long range planning and other functions required to open and operate a successful public charter school. The Board is legally accountable for all aspects of BCCA. The Board will be required to answer to the State Board of Education and all other stakeholders pertaining to all aspects of the School's life (operations, education, future growth, and community impact). The responsibilities of the Board shall include but not be limited to: developing the fiscal, operating and personnel policies and procedures; hiring, supervising and evaluating the Head of School, negotiating contracts with vendors, compliance with the terms and conditions of the charter; compliance with applicable State and Federal laws; development of the annual budget and regular monitoring of budgetary performance and facilitation and review of the annual, independent financial audit. The Board will not engage in the day to day operations of BCCA, but will empower and oversee the work of the Head of School charged with those same functions.

We have intentionally sought a Board with diverse backgrounds and wide ranging expertise with a strong component of educational experience. We expect our Board to be actively engaged in the governance of the school and promoting it within their community of influence at every opportunity. We expect our Board to function effectively at externally promoting the School and its' educational mission, while working to internally develop strategic commitments to further our mission.

The BCCA Board will facilitate the annual evaluation of the Head of School. The evaluation will utilize tools designed to produce a measurable, specific assessment of performance, in both quantitative and qualitative terms in key areas such as academic growth and development, financial strength and accountability, operational performance, staff satisfaction and their professional growth, parent engagement and satisfaction, etc. The Board will conduct an annual self-evaluation, as well. This evaluation will involve a systematic process for capturing input from various stakeholders (parents, faculty, staff, outside community leaders, etc.). This process will also include the hard data of financial stability and projected growth, student testing results along with enrollment retention and growth. The results of the evaluation will provide a basis for assessment, ongoing improvement, goal setting, planning and any needed realignment. The Board will invite input from key stakeholders and will set aside time during each board meeting to receive comment from any stakeholder. The Board will use these learning opportunities to further

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understand the life of the school and consider any pertinent input that has been received.

- 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 board of BCCA is a diverse cross-section of the community that includes educators, an attorney, an IT manager, a grant writer, and a pastor. The Board expects to soon add a realtor and a law school administrator after further "on boarding" and background checks have been accomplished satisfactorily. The Board is also seeking an independent business owner. The Board is of differing age groups and racial diversity of educational offerings in the community. We have sought people of professional stature that are committed to the success of the school. In the event of a vacancy the Board will examine the range of concerns affecting a decision to recruit a replacement that include professional skill set, community leadership, known integrity, and commitment to public and classical education, and influence with philanthropic and charitable leaders. The Board intentionally seeks persons that bring a differing set of professional skills that also have access to diverse sectors of the community.

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

In addition to an Annual Meeting, the Board will meet at least 8 times per year. Decisions about the focus of monthly meetings will be guided by evident needs determined in cooperation with the Head of School. We now have access to PEFNC's webinars on Governance, Fiscal Responsibility and more. We will use these materials in our meetings

- 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.*

New Board members will be "on boarded" prior to election to the Board by members of the Nominating Committee to be certain they are committed to public charter and classical education. Board members will also be advised about the Board notebook and all pertinent matters to the life of the school within 30 days after election to the Board. The notebook will include everything from the Charter and State laws, Board roster, and list of teachers, to the historical minutes and any newsletters produced within the previous year pertaining to the life of the school. Orientation will address Board policies and procedures, Board member responsibilities and expectations, and the fundamentals of governance. Annually the Board will undergo a full day of board training. Topics covered will include governance vs. management, keys to effective governance, the qualitative aspects of charter school leadership, conducting effective meetings, maintaining legal compliance, managing parent relationships, conflict resolution and SBE Policy review. The first Board training will take place within 90 days of the charter approval by the SBE.

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

The Board realizes the importance of its members being charged as stewards of the public trust and that each member's ethical conduct is a reflection

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on the entire Board and the mission of the school. The Board is committed to preserving the public trust by taking proactive measures to ensure that the highest ethical standards are practiced by each Board member, and in turn, the Board as a whole. Specifically, as a matter of best practices, we have adopted a Conflict of Interest Policy to guide individuals and the entire Board on matters that will help us avoid or resolve constructively any potential matters of conflict. The Policy requires that current Board members (and prospective Board members) examine, evaluate, and disclose those personal and financial interests that could possibly create a conflict of interest between individuals and the Board, or simply between Board members. Every Board member has an affirmative duty to provide any and all information that a reasonable person would conclude is necessary to fully disclose any existing conflict of interest or potential conflict of interest.

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

Adoption of school policy by a quorum of the Board at a legally called meeting will be the culmination of a process that seeks (via a subcommittee of the Board) input from interested/affected constituent groups within the school community, research of available alternatives, careful study of the impact and costs of a potential policy and thoughtful deliberation of preliminary solutions. Upon completion of this process, the subcommittee will make a policy recommendation to the Board which will give the matter consideration and either ratify the recommendation, take no action or refer the matter back to the subcommittee for additional research and further guidance.

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

The Board of BCCA (to include future consultation with the School's Head) is ultimately responsible for, and accountable regarding the actions, performance and success of the School. While the Board recognizes stakeholder groups like teachers and parents, and will listen closely to their voices, the structure of Board accountability will not utilize advisory boards, councils or associations within its organizational chart. The organizational chart for BCCA reflects a clear decision making authority at every level with each level accountable to the level above. The Board will nonetheless proactively seek feedback and input regarding various matters from the various constituent groups as a part of the process of developing and evaluating policies, and also refining policies as the need arises.

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

The Board will establish a standing Grievance Committee. the purpose of the Committee is to evaluate and determine the merits of a properly filed grievance by a parent or member of the faculty or staff, and to possibly make a recommendation to the Board for consideration. Filing a valid grievance requires that the aggrieved party address the issue with the following individuals in a identified sequence:

STAFF:

- 1st) seek resolution of the matter with whom the staff member has a disagreement
- 2nd) seek to resolve the grievance in the presence of the employee's immediate supervisor
- 3rd) seek resolution via the Head of School.

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4th) seek resolution with the Board of the School

PARENTS:

1st) seek resolution directly with the student's teacher or the staff member of concern.

2nd) seek resolution with the teacher or staff member's direct supervisor

3rd) seek resolution with the Head of School. 4th) seek resolution with School Board.

Grievance forms are to be provided to the aggrieved person within 48 hours of the request, and at no charge. No reason need to be stated to ask for, or receive, a grievance form. The form shall prominently display the routing for the form (either physical address of the Grievance Committee Chairperson, or his or her email address). Multiple grievances must not be stated on the form. Another form will be required for a second grievance. Each grievance, whether one or multiple grievances from the same party, must be thoroughly reviewed by the Committee. The aggrieved party has the right to an expeditious, objective and thorough review of the grievance. Upon receipt of the grievance, the Chairperson of the Committee shall convene a quorum of the Committee within a reasonable time, not to exceed twenty (20) calendar days from the date of receipt.

The Committee will consider all available evidence but is not required to conduct hearings, nor hear verbal testimony. After thoughtful review the Committee may elect to dismiss the grievance (i.e., take no action), request additional information or recommend action to the Board.

If the Committee chooses to dismiss the grievance, the Chairperson of the Committee will issue a letter to the aggrieved notify them of the Committee's position and the reason for that position. The letter must state that the aggrieved may appeal the matter directly to the Board by submitting a letter to the Secretary of the Board stating: "I appeal the decision of the Grievance Committee." The aggrieved must then state their reason for the appeal. The findings of the Board will then be final. If the Grievance Committee chooses to recommend action to the Board, the Chairperson will issue a letter to the aggrieved stating that the grievance has been referred to the Board for further action. In addition the Grievance Committee Chair will issue a letter to the Board indicating the specific action that the Committee is recommending to the Board. the Board may accept the recommendation, take action in the matter of concern regardless of the Grievance Committee's recommendation, or take no action. The Board's decision on this matter shall be final. All records submitted or reviewed during the grievance process are to be preserved in accordance with the School's retention schedule. Grievance records containing protected information under the law are not public documents and are not to be disclosed, published or released in full or in part. Grievance Committee members may not make any comment outside of their own proceedings, regarding the grievance deliberations or final outcome.

## 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).



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(Appendix E)

2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).
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 G).
4. A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix H)

### **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.

Positions include:

Head of School

Administrative Assistant

Financial Assistant

Teachers

Teacher's Aides

ELL Teacher

ESL Teachers

Custodial service

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

Include the following information for the proposed charter school:

We observe that most teachers, and certainly the best among them, pursue this vocation as exactly that, a vocation and not a job. Accordingly, we expect to create an environment that promotes excellence in the art of teaching as well as nourishment for continuing professional growth. We also recognize that the key to effective education is a well supported teaching corp and their leadership. Accordingly, by prudent fiscal management we intend to allow the financial growth and stability of the school to support increasing salary strength so that BCCA is known for strong teacher and administrative support. BCCA will promote a collaborative work environment

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where best practices guide colleague interactions and instructional development. These qualitative measures will under gird an environment that promotes excellence. This in turn will be the foundation for our recruitment and retention program with faculty. BCCA will reach out to other Classical Schools, Teach for America, and College and Universities in NC to provide teaching opportunities for newly certified teachers. We expect each grade level to have a senior teacher capable of mentoring newer teachers, so that all participants benefit from the school culture. BCCA will conduct a nationwide search, advertising available teaching positions in local media as well as national publications such as the Chronicle of Higher Education, Education Week and commercial job search sites. BCCA will also work with the NCDPI Educator Effectiveness division to assist in recruiting high quality teachers, particularly from the North Carolina Teacher Corps program. Lastly, BCCA will seek and pursue referrals from parents and members of the community who have knowledge or existing relationships with quality educators who would positively contribute to the BCCA team.

*2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board.*

Although BCCA's Board retains final authority over all faculty and staff at BCCA, it will delegate the duties of hiring, evaluation, discipline, promotion, assignment and termination of faculty and staff (in accordance with established policy and procedure) to the Head of School. The Head of School will remain accountable to the Board for all decisions made with regard to personnel.

Every member of the faculty and staff of BCCA will have open and equal access to the grievance process and will contribute through formal and informal surveys to the annual process of evaluation of the Head of School.

Employees will elect a staff representative annually to serve as a liaison to the Board. This liaison will attend Board meetings, provide faculty and staff insights on issues of importance and provide feedback to the Board with regard to policy and procedure. In addition, teachers and staff will be encouraged to serve on subcommittees of the Board.

The Board is responsible for reviewing, and if satisfactory, approving the terms and conditions of all employment contracts recommended to the Board by the Head of School.

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

The hiring process will generally include the following steps, but may be modified slightly for particular positions or unique circumstances:

Initial applications for employment will be screened by designated personnel for appropriate experience and credentials, education track record and goals stated as requisite for the position. A qualitative review of applications will then be conducted by the Personnel Committee or other designated team, and qualified candidates will be granted a first round interview. First round interview will be conducted by the Head of School and any other relevant designees of the Board. A candidate chosen to proceed to the second round of interviews will undergo a thorough back ground check. This step will include verification of the candidates education and certification,

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achievements and references. The candidate will be required to submit to a multi-state criminal background check and pre-employment drug screening by a qualified company (such as Labcorp). Presuming all these steps are satisfactorily met then the offer for employment will be made.

BCCA will establish a protocol for evaluating employees. In instances where staff or faculty members are identified as under-performing the staff or faculty member will be counseled by the Head of School and may be required to participate in a corrective action plan that establishes clear expectations, timelines and benchmarks for continued employment. Progress on the action plan will be monitored regularly through the duration of the time line. Upon re-evaluation the employee will be retained or discharge based upon progress.

Employees who commit acts of violence, endangerment or other behaviors that compromise student and workplace safety may be discharged without notice or recourse.

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

We will provide right around \$85,000 for the Head of School, with possible adjustments related to experience.

The average teacher salary will be in the low \$40,000 range. We will seek a lead teacher with credentials and experience that warrant a higher number for each grade level (a lead teacher), and newer teachers under that person's mentoring at a lower number (averaging therefore in the lower \$40,000 range).

We will provide in the low \$20,000 range teacher assistants.

Average non-executive personnel will range from the low \$20,000 range and up. All salary considerations must be addressed in light of the complete budget needs of the school. When the school is scheduled to secure an Assistant Head of School that person will start half time in year one and then grow. Salary considerations will be managed in light of experience, budget latitude (remaining in line with other personnel), and professional expectations.

**Benefits:**

Employees will receive major medical insurance through the state health program. BCCA intends to pay a portion of the premium cost (for the sake of conservative planning the budget assumes 100% of employee premium costs, but economic conditions and uncertain market dynamics - particularly related to the continuing adjustments in health care programs - may not make it economically feasible for the School to fund the entire premium.

BCCA will also make supplemental insurance available through a Section 125 Cafeteria plan. Such coverage includes cancer, dental, short/long term disability, life, vision and other insurance. The Section 125 plan premiums would be the employee's responsibility.

BCCA will offer employees a fixed number of leave days in accord with prevailing law (Family Medical Leave Act) and participation in a tax deferred, defined contribution retirement plan. BCCA will provide a dollar for dollar match (or portion thereof) for employee contributions up to a maximum amount as defined by the plan documents.

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

In a previous section we discussed the process for Parents and Staff members. This is somewhat similar. The Board will establish a Grievance Committee for the purpose of responding to properly filed grievances. The Committee will determine the merits of the grievance and after investigation determine a recommendation that will be made to the Board in writing. Filing a valid grievance requires that the aggrieved party address the issue with the following sequence:

1st) seek resolution directly with the staff member perceived to be causing the problem

2nd) seek resolution via the staff member's immediate supervisor

3rd) seek resolution via the Head of School

4th) take the grievance to the Board.

BCCA forbids retaliation when it comes to any aspect of employment, including grievance and complaints.

Should the grievance merit action by the Head of School, then the affected employee will have an written, actionable sequence of expectations with a reasonable time line and benchmarks for improvement. Success in this process will determine further employment. Employees convicted of or pleading nolo contendere to a felony or to certain Class A1, 1 or 2 misdemeanors may be discharged without notice to the extent that the law permits. Employees who are charged with a felony or certain Class A1, 1 or 2 misdemeanors may be suspended with pay pending outcome of a trial or hearing. Employees who commit acts of violence, assault, endangerment or other behaviors on school property at anytime that compromises student and workplace safety may be discharged without notice.

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

Not applicable. We simply do not have any such dual responsibility position in mind or planned.

*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.*

Assuming special education enrollment at 12% of the total student population, the initial special education staff will include 1 Special Education Director, 1 Special Education Teacher and the possible addition of a special education teacher assistant. EC staffing will fluctuate up or down as exceptional child enrollment and IEP requirements dictate.

The faculty will include at least one certified teacher with ESOL/ELL certification or endorsement. Special education teachers will have a Bachelors degree in education, curriculum and instruction, or related field from an accredited college or university and will hold a teachers certification reflecting mastery of the principles of exceptional child education, special education curriculum and instructional theory and use of data to drive student progress and program improvement.

*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).*

Faculty and staff will be required to hold the appropriate licenses, certification, endorsement and experience necessary to faithfully and satisfactorily fulfill the roles and responsibilities for which they were hired and as required by their job description. Faculty and staff will

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conduct their work in a manner consistent with the mission of the school, the needs of every student and the expectations of all stakeholders.

#### Teachers:

In accordance with the State law, 50% of classroom teachers at the School will hold a valid NC Standard Professional ("SP") 1 Professional Educators License ;and the School will develop, maintain, and, as necessary, have approved by the NCDPI a teacher licensure program, allowing teachers to progress from a SP1 License to a SP2 License and renew SP2 Licenses from time to time. Educators who qualify for Lateral Entry in NC will be considered for employment as teachers. Teachers designated as Department Heads will be responsible for necessary evaluation and reporting on programs and staff and will possess experience and/or advanced credentials commensurate with the position.

#### Head of School:

The Head of School will provide educational and operational leadership, contractual accountability and logistical direction as part of his/her responsibility for the day-to-day management of the school. The Head is accountable to the Board. Minimum qualifications include a Master's Degree in administration, educational leadership, curriculum and instruction or a related academic management field and at least 5 years of experience at the executive leadership level. Preference will be given to candidates who have classroom experience as a certified/licensed teacher and those who have earned administrative certification through a recognized or accredited training program.

#### Assistant Head of School:

This person is responsible when the Head of School is off campus, or attending professional development work, or other similar circumstances. The Assistant Head will also (as appropriate and when designated) supervise the evaluation of instructional and non-instructional staff, will oversee and coordinate professional development programming and will serve as the chief disciplinarian in the event of student misconduct. Qualifications include possession of a valid state teaching certificate with preference given to those candidates with administrative certification through a recognized or accredited training program.

#### Business / Finance Officer:

This person is responsible for managing the requisition, purchasing and accounts payable, payroll, budget and financial reporting functions of the school. The Finance Officer will interact with the accounting staff, provide regular financial and budget reports to the Board as requested, assist in drafting the annual budget and coordinate the annual audit. Qualifications include a bachelor's degree in finance, accounting or a related field. In lieu of a bachelor's degree, candidates may qualify by demonstrating extensive experience and success in school business.

#### Guidance Counselor:

The primary function of the Guidance Counselor is to provide a comprehensive competency based counseling program focused on the learning, persona/social and career/vocational needs of all students. The Guidance Counselor will possess a Masters Degree in Guidance and/or School counseling and hold a current license for the position as required by NCDPI. The Guidance Counselor will have a minimum of three years of teaching, counseling, or

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experience working with children similar in age for which the position is posted.

Other Administrative and Support Personnel:

These persons will have duties defined by their position and the delegation of responsibilities from the Head of School. These persons will require credentials and requisite experience based on the position's duties and responsibilities.

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

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

The Assistant Head of School, under the direction of the Head of School, and assisted by applicable administrative support staff, is responsible for maintaining teacher licensure and professional development.

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

BCCA will model the NC Teacher Evaluation Process which is based on the framework for the 21st Century Learning and the NC Professional Teaching Standards in order to assess the teacher's professional growth. In addition the school will develop an evaluation rubric modeled on the Rubric for Evaluating NC Teachers. The Head of School, or designee, will conduct the evaluation process in which the teacher will actively participate through the use of self-assessment, reflection, presentation of artifacts, and classroom demonstration(s).

Instructional staff will be evaluated based on the six aligned standards adopted by the NCSBE (Leadership, Establishing a Respectful Environment, Content Knowledge, Facilitation of Learning, Critical Reflection, Contribute to Academic Success).

#1: Training: Before participating in the evaluation process, all teachers, administrators and peer evaluators must complete training on the evaluation process.

#2: Orientation: Within two weeks of the first day of any teachers new school year, the Head of School will provide all teachers with the evaluation rubric that will be used during the evaluation process and a schedule for completing each component of the evaluation process.

#4: Pre-Observation Conference: Before the first formal observation, the Head of School will meet with the teacher to review and discuss the self assessment, the teacher's most recent professional growth plan, and the lesson(s) to be observed. The teacher will provide the Head with a written lesson plan. The goal of the conference is to prepare the Head for the observation. In the event that there are multiple observations, pre-observation conferences are not required for subsequent observations.

#5: Observations: Formal observations by the Head will be made for a minimum of 45 minutes of the entire class period. If the class period is less than 45 minutes, then two sequential periods will be utilized to have the time necessary for proper evaluation. Those teachers that are designated as Probationary will undergo no fewer than three formal classroom observations,

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one of which must be conducted by a peer designated by the Head. Career teachers will be evaluated no fewer than two times per year. During observations, the Head and the peer will note, in writing, the teacher's performance in relation to the standards contained in the evaluation rubric.

#6: Post-Observation Conference: the Head of School and the peer for probationary teachers shall conduct a post-observation conference with the teacher being evaluated no later than ten days after each formal observation. During the post-observation conference, the Head and Teacher shall discuss on the evaluation rubric the performance strengths and weakness from the observed lesson.

#7: Professional Development Plan: Based on the teacher's performance a professional development plan will be crafted that outlines specific areas for improvement or reinforcement, strategies to address deficiencies, benchmarks to be met and a time-line for re-evaluation.

The evaluation process will include the following components:

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 BCCA professional development plan has as its nucleus a commitment to a mission-driven focus on classical and charter education. Central to this is the continuing development of high quality instruction for constant improvement in student learning. Through the use of qualified contractors, trained in house staff, professional conferences, guest speakers and on line learning the professional development program will include topics of current and historical value in the art and craft of teaching for learning. These area will include classroom management, evidence based instructional strategies, engaging parents in the educational process, technology benefits, content competency and other pertinent topics. In addition to self-study or a strict group lecture format, professional development programs will emphasize small group instruction and discussion, peer collaboration and teamwork. Workplace issues will also be incorporated into the professional development program covering topics such as maintaining a safe workplace, First Aid/CPR/AED training, effective communication, preventing sexual harassment and cultivating a culture that respects the dignity of every human being.

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.*

Pre-opening professional development will begin two weeks (11 days) prior to the first day of school for students. Faculty and Staff will report to school at 8:00 a.m. and remain until 2:00 p.m. Each day will include approximately 60 - 90 minutes of classroom setup and 30 minutes for lunch. The remaining 35-40 hours will be utilized for professional development. Approximately 10 - 15 hours will be used to train the staff on all operating policies and procedures including school safety plans, Code of Ethics, employment policy review, student referrals for discipline, student referrals for special education, reporting/managing workplace violence (including sexual harassment) and other procedural, safety and policy topics. An additional 5-10 hours will be designed to build a culture of

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collaboration among the staff through ice-breakers, team building exercises, simulations and small group problem solving. The remaining time will be used to orient the staff toward school wide instructional objectives during which the instructional goals and measurement criteria for student performance will be discussed in detail as a group. Breakout time will be incorporated into the instructional objectives program instructional/grade teams, led by grade leaders, to meet and define specific objectives within their grades, develop team wide instructional strategies, create action plans for anticipated obstacles and challenges, coordinate lesson plans and synthesize curriculum components within the grades.

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

The school calendar provides 18 teacher work days, of which 11 will be considered mandatory professional development days prior to the beginning of school, where teachers will receive curriculum design and goals, classroom management and the remainder of the days throughout the year providing continuous support and training for faculty and staff. Approximately 20-25 hours of additional staff development will be structured into four, half days, which will be incorporated into the calendar. School will not be in session for students during these days but faculty and staff will be required to work the normal school business hours. The programming for each day may be interrupted by the need to address trending "hot topics." Otherwise the needs identified by the Head of School in conjunction with the Board, and staff leaders will determine programmatic opportunities for maximizing professional development. In addition the school will advise teachers of short (1-2 hour) topic specific on line and webinar based voluntary learning opportunities that are available throughout the year. If teachers choose to participate in such opportunities, arrangements will be made in advance so that classes can be delivered during the time that the teacher is participating in professional development.

### **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.218.45(a-i) 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-218.45(e)).*

The school will use a variety of methods to promote the school and attract families and their students. Some of these methods may include but are not limited to the following:

- 1) developing the BCCA social media program (web page, facebook, twitter, instagram)
- 2) fostering relationships with local child care centers (possibly having lunch and learns with parents of preschool children). Network through the highly frequented YMCA, the Boys and Girls Club, Business and Professional Women, Community Conversations, and other groups of community significance.



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3) Holding periodic informational meetings with civic, religious, and neighborhood associations.

4) development of our own web site with access to informational videos and readings about classical and charter education The Board recognizes the importance of community awareness and education as the foundation of recruitment. In order to promote a direct relationship with the community the Board will start with the outreach described above and then broaden when able to include a focus on mass market opportunities. Marketing to residents in the surrounding communities will be the primary focus. We will market to all populations (ethnic, geographic, economic, etc.) We anticipate that the majority of the students will live within a 20 mile radius of the school, and thus reflect the local community being served. Targeted marketing will be used to focus on this geographic area. Additionally, select marketing materials will be created and produced in multiple languages based on the demographics of the local area.

### **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.*

While the focus of education is on the teaching/learning relationships cultivated in the classroom and the school, we also think of education as a family affair. We therefore prize parental awareness and engagement with the life and culture of the school. We will listen to the experiences of other schools and look for innovative ways to heighten parental engagement. Because we intend to reach out to the whole community we know we will have to offer communications that are bi-lingual in order to engage our parents and continue to promote the school.

Our web site will have bi-lingual materials and informational offerings along with general announcements. We also know that a percentage of our families will not have computers and the internet in their home, so we will have to print announcements and see that they are carried home in student's book bags (or by any other viable means).

Once enrollment becomes active we will offer "on boarding" meetings that allow the parents to learn more about charter education, classical curriculum, and means for their involvement in the life of the school. We will do this in a monthly format beginning in the spring of the year we will open. We will make these meetings accessible to all (possibly offering the same event in multiple locations and varying times of the day). We will commence these meetings in the Spring of the year that the school will open so that parents can grow comfortable with the Board, the Staff and teachers, become comfortable interfacing with the community and develop friendships so that they understand the school as being "their school."

On the eve of opening and within the first weeks of school we will host Open Houses and deepen the "on boarding" experience around the subjects of public charter education, classical curriculum, parent involvement, and other community and school matters trending at the time.

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We will expressly seek out any parent that may provide strong liaison opportunities into the various minority communities of our area.

We will also look for parent volunteers as the need and opportunity grows for their engagement.

We will host back to school nights at the frequency deemed beneficial to the growth and development of the school.

## **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.*

Except as otherwise provided by law BCCA will not limit admission to students on the basis of intellectual ability, disability, race, creed, gender, national origin, religion, or ancestry. We will not discriminate. Pre-admission activities will be focused on providing interested parents with a letter of interest that will provide for the student's name, grade and contact information for the parents. The letter of intent will be clearly marked as such and state obviously that it is NOT an application or an enrollment commitment. This letter of intent will be the basis of continuing family outreach and marketing, and as a preliminary planning tool for staffing and materials considerations. We will begin enrolling for the

2018 / 2019 school year as soon as possible following the final approval by the NCSBE and continue through April 2018. At that time, and pending any changes in procedure issued by the NCSBE, we will make a determination regarding the necessity of a lottery, or to continue enrollment until all spaces are filled. If a lottery is needed it will be done as directed by State law. We will enroll any eligible student who submits a timely application unless the number of applications exceeds the capacity for the program, class,

grade level or building. In this case students will be accepted by lottery. Once enrolled students are not required to reapply in subsequent enrollment periods. Notwithstanding any law to the contrary, BCCA may refuse admission to any student who has been expelled or suspended from a public school under G.S. 115C390.5 through G.S. 115C390.11 until the period of suspension or expulsion has expired.

Any student residing in the State of NC must complete the application process to be considered for enrollment. The required application will consist of, and may not be limited to, the following: a personal application form issued by the school and identified as such, which includes the student's name, place of residence, parent/guardian's names and addresses, student's birth date, present school enrollment, current grade.

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Following the first year of operations, BCCA may give enrollment priority to siblings of currently enrolled students who were admitted to BCCA in the previous year and to children of the school employees. If multiple birth siblings apply for admission and a lottery is needed under G.S.115C238.29F(g)(6), the charter school align with prevailing law regarding admission of multiple birth siblings.

No criteria for admission will be used other than a completed application form and residence in NC. A wait list will be maintained in the event that space becomes available and the school chooses to continue to fill open enrollment positions. The parents of students may withdraw or transfer their children at any time. A student's records will be forwarded as official documents to the child's receiving school. Should a parent want to re-enroll their student in our school then they must go through the same admission process.

### **Weighted Lottery**

*Does your school plan to use a weighted lottery?*

Yes:

No:

*The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:*

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

*If the applicant is requesting to use a weighted, or otherwise limited, lottery, please provide the following:*

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*
- 2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*
- 3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

**PROJECTED ENROLLMENT**

**2018-19 through 2022-2023**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Cabarrus County Schools  
 LEA #2 Charlotte-Mecklenburg Schools  
 LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 130	LEA 600	LEA 000	LEA 130	LEA 600	LEA 000	LEA 130	LEA 600	LEA 000	LEA 130	LEA 600	LEA 000	LEA 130	LEA 600	LEA 000
Kindergarten	15	54	0	15	54	0	15	54	0	15	54	0	15	54	0
Grade 01	15	54	0	15	54	0	15	54	0	15	54	0	15	54	0
Grade 02	15	54	0	15	54	0	15	54	0	15	54	0	15	54	0
Grade 03	0	0	0	15	54	0	15	54	0	15	54	0	15	54	0
Grade 04	0	0	0	0	0	0	15	54	0	15	54	0	15	54	0
Grade 05	0	0	0	0	0	0	0	0	0	15	54	0	15	54	0
Grade 06	0	0	0	0	0	0	0	0	0	0	0	0	15	54	0
	45	162		60	216		75	270		90	324		105	378	

<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Provide more clarity on the number of board members, quorum, voting power and explicitly describe the evaluation guidelines and procedure providing timeline and benchmarks in the academic year.	Avril Smart	Governance a
Describe the removal process of a board member	Buffy Fowler	Governance a
Will school leader evaluations include a student performance evaluation? If so what assessment will be USED? Describe the assessment that will be used to formulate student performance goals to be used by the board for self evaluation? The proposed governing board lacks the necessary and critical skill sets especially with regard to financial and fiscal expertise and education and school leadership (i.e. district, state, charter school experience).	Tracy Kelley	Governance a
I like the diversity of professions on the board and the fact that there are educators on the board.	Steven Walker	Governance a
N/A	Steven Walker	Proposed Man
NA	Avril Smart	Proposed Man
The organization chart is confusing and disjointed. It is unclear how the school will be organized and how if at all a distributive leadership chain will be structured. The narrative describes the role of teacher leaders, but they are not included in the org chart. The leadership vision does not align with plans for mentor teachers, teacher teams and the schedule does not clarify how common planning time will be structured or what the expectations are for teacher meetings or teacher leaders.	Tracy Kelley	Staffing Pla
ESL and ELL teachers are listed but no exceptional children's teacher. No social worker or counselor on staffing plan. Head of school is delegated authority to hire and fire staff-this should be the responsibility of the board.	Sherry Reeves	Staffing Pla
What steps are in place to make sure the applicant's teaching philosophy aligns to the mission of the organization? What stipulations are in place to ensure adequate racial ethnic representation among faculty? How will the NC Educator Evaluation process align with the boards teacher evaluation process?	Avril Smart	Staffing Pla
The response does not describe a system for how school leaders will ensure teachers are delivering high quality rigorous instruction through a series of pop in observations and teacher feedback. The response dose not describe PD that aligns with implementing a classical school program. How will teachers be guided in what it means to deliver the grammar, rhetoric, logic model? How will student learning drive PD decisions?	Tracy Kelley	Staff Evalua
Are there any teacher practices that need to be evaluated in the "Classical" model that aren't clearly addressed by the SBE instrument? Will there be sufficient training time before opening for teachers to become proficient with the "Classical" model, Singapore Math, etc.?	Kevin Piacenza	Staff Evalua
How will marketing reach parents and families who do not have internet/ digital media access? What specific marketing strategies will be applied to recruiting high needs populations?	Avril Smart	Marketing Pl
There is \$9000 planned for marketing the first year and \$8000 each year thereafter. What is the reasoning for the first year only costing \$1000 more when you are recruiting over 200 students and only 69 students in following years? Explain how the \$9000 is spent in implementing this marketing plan?	Buffy Fowler	Marketing Pl
Where does the parent and community involvement plan include specific provisions for communities of color as this group represents almost 50% of students in the county?	Avril Smart	Parent and C
Explain in more detail how parents will be partners, including what does parent involvement look like on a daily basis. The description detailed how the school will communicate with families. The term "On Boarding" is used several times in the application. Explain what is meant by on boarding.	Buffy Fowler	Parent and C
What is the enrollment period to accept applications to determine whether a lottery is needed or not?	Buffy Fowler	Admissions P
Applicant needs provide a rationale for why K-2 grade enrollment is realistic for year	Tracy Kelley	Projected St

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one.		
How will you meet your student enrollment numbers? Do you have a contingency plan if you do not meet your student enrollment numbers?	Brian Smith	Projected St
What was the driving force behind the decision to start the school as a K-2? How did you determine the projected enrollment?	Sherry Reeves	Projected St
Please specify the number of schools in the surrounding area that the applicant expects to receive applicants from	Avril Smart	Projected St
I have staffing questions around EC. I do not see specifically EC teachers listed.	Anthony Helton	Projected St
See questions in prior section about realistic numbers.	Buffy Fowler	Projected St
N/A	Steven Walker	Weighted Lot
Where do you demonstrate forward thinking around recruitment/application process to verify if applicants meet school demographic requirements?	Avril Smart	Weighted Lot

Reviewer	Score
Phyllis Gibbs	
Steven Walker	Pass
Becky Taylor	
Deanna Townsend-Smith	
Tracy Kelley	Pass
Robert McOuat	
Buffy Fowler	Pass
Anthony Helton	Pass
Glenn Allen	
Tammi Sutton	
Kevin Piacenza	Pass
Avril Smart	Pass
Brian Smith	Pass
Sherry Reeves	Pass

## **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.*

We will not provide transportation year one, though we will facilitate carpooling to gain enrollment. We will pick up transportation in year two, after we have gained experience with the community. This delay will allow us to focus on priorities of compensation and building a fund reserve.

In year two of operation we will secure our own buses and running our own bus service, if contract bus providers are not suitable. We have previously reached out to the number one bus re-seller in the Southeast to determine the viability of this approach. This matter is yet to be resolved.

We expect to develop a parent facilitated car pool network. We also believe that creating a car pooling network is vital to community life, school engagement, and utilization of our common resources. We recognize that carpooling requires careful management to secure our intended ideal of inclusion for all within the community.

We envision children arriving by a number of conveyances - personal car, and car pooling.

We have sought a facility that is central to the UNCC area to promote access to school. We are in discussions with a very viable facility to lease, and have also secured the services of CNL Commercial Real Estate to find the facility we need, should our first option now work out.

### **School Lunch Plan:**

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

The students at BCCA will be expected to bring a bag lunch in year one, and certainly until we can secure a facility with a kitchen (even a warming kitchen for selected providers). We will explore through our Parent organization programs offered by Community Connections. A number of their member organizations (like Chick-Fil-A) may offer a discounted lunch option on a specified day of the week. The President of Community Connections is very interested in supporting this through his catering program. This would be structured through the Parent Organization of the School.

Our goal will be to ensure that each child receives a nutritious meal on a daily basis. All students at BCCA will be expected to bring a bag lunch to school daily. However, if a child does not bring a bag lunch to school, one will be provided. Our budget includes a provision of \$83 per day, which BCCA believes will feed approximately 15% of the total student enrollment. This will insure that no child at BCCA goes without a lunch. If a child repeatedly arrives without a lunch, a conference will be held with the parents of the child. During this meeting BCCA will determine the

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affordability of lunch for that child. If the child does not qualify for free and reduced lunch but is still unable to bring a bag lunch from home due to extenuating circumstance BCCA will create a long-term plan, on a case-by-case basis, to ensure all students receive a nutritious meal every day.

**Civil Liability and Insurance (GS 115C-218.20):**

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		\$7,000.00
Officers and Directors/Errors and Omissions	\$1,000		\$900.00
Property Insurance	\$4,000		\$7,300.00
Motor Vehicle Liability	\$1,000		\$1,500.00
Bonding Minimum/Maximum Amount	\$250	\$250	\$500.00
Other	\$2,500		\$9,700.00
<b>Total Cost</b>			<b>\$26,900.00</b>

\*The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) 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 § 115C218.75.

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.

bonnieconeclassical                      09/15/2016

(Board Chair Signature)

(Date)

**Facility:**

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



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*What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy.*

We are in the process of securing a Letter of Intent to allow BCCA to lease the facility of the Oasis Shrine Temple. We believe this will allow us room to grow the school over successive years. We also know that other options may become more attractive or needed so we also have engaged Mr. Stewart Hasty of CNL Real estate (a premiere commercial brokerage in the SE). Mr.Hasty's expertise is finding facilities for Charter Schools. He understands those facilities run the gamut from a no longer used Church to an abandoned Grocery Store, and everything in between. Mr Hasty advises us that he cannot successfully secure property until we have a charter in hand and the expectation of opening within 12 months. Nonetheless, he stands ready to find property for us, should anything adverse happen to our first intended location.

*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.*

Discussions have begun on the basis of a \$15,000 per month (all inclusive charge: electricity, water, parking)) for the facility that is just above 25,000 square feet. The facility owner is very interested. This is a cost of \$7.20 per square foot.

**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.*

We have engaged the services of Mr. Stewart Hasty, the charter school specialist with CNL Commercial Realtors. CNL is a premiere Commercial Real Estate firm in the Southeast. The President is personally committed to our success and has reduced the commission structure a bit to enhance their negotiating power. So, while we believe we will soon enter into a formal relationship with the Oasis Shrine Temple, we are prepared to find the space we need to for the success of the school. We'd like to be close to UNCC and major transportation lines, and also stay within a five mile radius of the College if at all possible. We realize that we could very easily end up in Cabarrus County, close to the UNCC campus.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
I would like something more concrete as to how a student without other options will gain access to the school in year one.	Steven Walker	Transportati
How will you provide transportation to a student with a disability if it is identified as a related service on their IEP?	Glenn Allen	Transportati
The proposed area around UNCC is described as diverse and the targeted student population is described as seeking a diverse student population. How will not providing transportation in the first year, when you are recruiting over 200 students affect diversity? What strategies will be put in place to ensure transportation does not affect diversity? If the lack of transportation does affect diversity in the first year how will BCCS recover from the lack of diversity when only enrolling 69 new students each year as opposed to over 200 the first.	Buffy Fowler	Transportati

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What is the plan for students who are unable to carpool and cannot attend without transportation? How will you budget to ensure students needing transportation are taken care of?		
How does this transportation plan make specific plans for special populations in terms of access to this school as an option?	Avril Smart	Transportati
If carpooling is not an option for a student(s) who needs transportation, what is the applicant's contingency plan?	Kevin Piacenza	Transportati
Will offering no transportation in year 1 be a barrier to attracting students?	Sherry Reeves	Transportati
How will bringing a bag lunch impact the potential of attracting students who qualify for free/reduced lunch program? Will the school have lunch on hand for those students who do not bring their lunch to school?	Sherry Reeves	School Lunch
How will students and families be identified as needing school lunches prior to students showing up without a meal or being asked to attend a meeting? How will the school lunch procedure for students who are economically disadvantaged and in need of lunch support be communicated prior to the enrollment process? How does no formal lunch support procedure in the first year affect diversity as described in the targeted population? How will the school recover after year one if diversity is affected?	Buffy Fowler	School Lunch
This figure is much higher than figures reported by other charter applicants.	Sherry Reeves	Civil Liabil
Can the applicant clarify the total cost @ \$26,900? It seems higher than is typical.	Kevin Piacenza	Civil Liabil
Does this figure match what is in the budget?	Buffy Fowler	Civil Liabil
This quote seems a little on the high side and I believe the numbers were put into the table incorrectly but appear to be correct in Appendix L.	Steven Walker	Civil Liabil
Applicant should provide a rationale for wanting to be near UNCC, as the application does not describe a formal or informal partnership between the proposed school at and the University. If group anticipates a partnership that should be made clear.	Tracy Kelley	Facility and
Is seems that no transportation or lunch program could discourage low income families from attending	Anthony Helton	Facility and
Have assessments for up-fitting the Oasis Shrine Temple been made?	Kevin Piacenza	Facility and

Reviewer	Score
Steven Walker	Pass
Tracy Kelley	Pass
Brian Smith	Pass
Tammi Sutton	
Sherry Reeves	Pass
Buffy Fowler	Pass
Deanna Townsend-Smith	
Anthony Helton	Pass
Kevin Piacenza	Pass
Phyllis Gibbs	
Glenn Allen	
Avril Smart	Pass
Robert McOuat	
Becky Taylor	

## 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 2018-19**

<p><b>SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL</b></p> <p><i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i></p>	<p><b>State Funds:</b> Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1<sup>st</sup> month average daily membership.</p> <ul style="list-style-type: none"> <li>• In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides</li> <li>• In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> is located.</li> </ul> <p><b>Local Funds:</b> Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.</p> <p><b>Federal Funds:</b> Charter schools must qualify and apply for the individual federal grants based on their population of students.</p> <p><b>REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS</b></p>			
	<p>LEA #1130 - Cabarrus County Schools</p>			
	<b>Revenue</b>	<b>2016-2017 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2018-2019</b>
	State Funds	\$4,815.21	45	\$216,684.45
	Local Funds	\$1,683.11	45	\$75,739.95
	Federal EC Funds	\$3,579.70	4	\$14,318.80
	<b>Totals</b>			<b>\$306,743.20</b>
	<p>LEA #2600 - Charlotte-Mecklenburg Schools</p>			
	<b>Revenue</b>	<b>2016-2017 Per Pupil Funding</b>	<b>Projected LEA ADM</b>	<b>Approximate funding for 2018-2019</b>
	State Funds	\$4,852.22	162	\$786,059.64
Local Funds	\$2,469.24	162	\$400,016.88	
Federal EC Funds	\$3,579.70	18	\$64,434.60	
<b>Totals</b>			<b>\$1,250,511.12</b>	

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**Total Budget: Revenue Projections 2018-19 through 2022-2023**

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
-State ADM Funds	\$1,002,744	\$1,339,212	\$1,674,015	\$2,008,819	\$2,343,622
-Local Per Pupil Funds	\$475,757	\$708,419	\$792,333	\$951,514	\$1,110,100
-Exceptional Children & Federal Funds	\$78,753	\$100,213	\$128,869	\$157,506	\$186,144
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$1,557,254</b>	<b>\$2,147,844</b>	<b>\$2,595,217</b>	<b>\$3,117,839</b>	<b>\$3,639,866</b>

**\*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 J.**

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**Personnel Budget: Expenditure Projections 2018-19 through 2022-2023**

*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	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$85,000	\$85,000	1	\$87,000	\$87,000	1	\$89,000	\$89,000	1	\$91,000	\$91,000	1	\$93,000	\$93,000
Assistant Administrator	0	\$0	\$0	.5	\$67,000	\$33,500	.5	\$68,500	\$34,250	1	\$70,000	\$70,000	1	\$72,000	\$72,000
Finance Officer	.5	\$32,600	\$16,300	1	\$33,500	\$33,500	1	\$34,000	\$34,000	1	\$35,000	\$35,000	1	\$36,000	\$36,000
Clerical	.5	\$24,500	\$12,250	1	\$26,000	\$26,000	1	\$26,750	\$26,750	1	\$27,500	\$27,500	1	\$28,250	\$28,250
Food Service Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Custodians	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Transportation Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$0	\$0
A - Total Admin and Support:	2		\$113,550	3.5		\$180,000	3.5		\$184,000	4		\$223,500	5		\$229,250
Instructional Personnel:															
Core Content Teacher(s)	9	\$42,500	\$382,500	12	\$43,750	\$525,000	15	\$45,000	\$675,000	15	\$46,300	\$694,500	18	\$47,600	\$856,800
Electives/Specialty Teacher(s)	1	\$43,000	\$43,000	2	\$43,900	\$87,800	3	\$45,000	\$135,000	4	\$46,200	\$184,800	4	\$47,300	\$189,200
Exceptional Children Teacher(s)	2.5	\$43,000	\$107,500	2.5	\$43,900	\$109,750	3	\$45,000	\$135,000	4	\$46,200	\$184,800	4	\$47,300	\$189,200
Instructional Support	80	\$135	\$10,800	110	\$140	\$15,400	140	\$145	\$20,300	170	\$150	\$25,500	200	\$155	\$31,000
Teacher Assistants	4	\$21,000	\$84,000	5	\$21,600	\$108,000	6	\$22,300	\$133,800	7	\$23,000	\$161,000	8	\$23,700	\$189,600
B - Total Instructional	96.5		\$627,800	131.5		\$845,950	167		\$1,099,100	200		\$1,250,600	234		\$1,455,800

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	98.5		\$741,350	135		\$1,025,950	170.5		\$1,283,100	204		\$1,474,100	239		\$1,685,050
Administrative & Support Benefits															
Health Insurance	2	\$5,400	\$10,800	3.5	\$5,600	\$19,600	3.5	\$5,900	\$20,650	4	\$6,100	\$24,400	4	\$6,300	\$25,200
Retirement Plan--NC State	2	\$2,500	\$5,000	3.5	\$2,600	\$9,100	3.5	\$2,700	\$9,450	4	\$2,800	\$11,200	4	\$2,900	\$11,600
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	2	\$750	\$1,500	3.5	\$800	\$2,800	3.5	\$850	\$2,975	4	\$900	\$3,600	4	\$950	\$3,800
Social Security	2	\$3,400	\$6,800	3.5	\$3,500	\$12,250	3.5	\$3,600	\$12,600	4	\$3,700	\$14,800	4	\$3,800	\$15,200
D - Total Admin and Support Benefits:	8		\$24,100	14		\$43,750	14		\$45,675	16		\$54,000	16		\$55,800
Instructional Personnel Benefits:															
Health Insurance	16.5	\$5,600	\$92,400	21.5	\$5,800	\$124,700	27	\$6,000	\$162,000	30	\$6,200	\$186,000	34	\$6,400	\$217,600
Retirement Plan--NC State	16.5	\$2,500	\$41,250	21.5	\$2,650	\$56,975	27	\$2,800	\$75,600	30	\$3,000	\$90,000	34	\$3,200	\$108,800
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Social Security	16.5	\$3,500	\$57,750	21.5	\$3,600	\$77,400	27	\$3,700	\$99,900	30	\$3,800	\$114,000	34	\$3,900	\$132,600
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	16.5	\$730	\$12,045	21.5	\$770	\$16,555	27	\$810	\$21,870	30	\$850	\$25,500	34	\$890	\$30,260
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional Personnel Benefits:	66		\$203,445	86		\$275,630	108		\$359,370	120		\$415,500	136		\$489,260
D+E = F - Total Personnel Benefits	74		\$227,545	100		\$319,380	122		\$405,045	136		\$469,500	152		\$545,060
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10		\$137,650	17.5		\$223,750	17.5		\$229,675	20		\$277,500	21		\$285,050

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B+E = H - Total Instructional Personnel (Salary & Benefits)	162.5		\$831,245	217.5		\$1,121,580	275		\$1,458,470	320		\$1,666,100	370		\$1,945,060
G+H = J - TOTAL PERSONNEL	172.5		\$968,895	235		\$1,345,330	292.5		\$1,688,145	340		\$1,943,600	391		\$2,230,110

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**Operations Budget: Expenditure Projections**  
**2018-19 through 2022-2023**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
	Administrative & Support:					
Office:	Office Supplies	\$6,200	\$7,000	\$7,800	\$8,800	\$9,800
	Paper	\$1,300	\$1,600	\$1,800	\$2,000	\$2,250
	Computers & Software	\$12,000	\$10,000	\$10,000	\$12,000	\$12,000
	Communications & Telephone	\$6,500	\$7,500	\$8,500	\$10,000	\$11,500
	Copier leases	\$28,000	\$30,500	\$32,000	\$34,500	\$36,000
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$4,000	\$5,000	\$5,000	\$5,000	\$6,000
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$16,500	\$21,500	\$25,000	\$30,000	\$40,000
	Other Professional	\$8,500	\$9,500	\$12,500	\$15,500	\$18,000
Facilities	Facility Lease/Mortgage	\$180,000	\$180,000	\$190,000	\$200,000	\$208,000
	Maintenance	\$7,000	\$9,000	\$11,000	\$13,000	\$15,000
	Custodial Supplies	\$3,500	\$5,000	\$6,500	\$8,000	\$9,500
	Custodial Contract	\$22,000	\$22,500	\$23,000	\$23,500	\$24,000
	Insurance (pg19)	\$12,576	\$15,500	\$18,000	\$21,000	\$24,000
	Other	\$18,000	\$20,000	\$22,000	\$24,000	\$26,000
Utilities	Electric	\$0	\$0	\$0	\$0	\$0
	Gas	\$0	\$0	\$0	\$0	\$0
	Water/Sewer	\$0	\$0	\$0	\$0	\$0
	Trash	\$0	\$0	\$0	\$0	\$0
Transportation	Buses	\$0	\$50,000	\$95,000	\$150,000	\$160,000
	Gas	\$0	\$0	\$0	\$0	\$0
	Oil/Tires & Maintenance	\$0	\$0	\$0	\$0	\$0
Other	Marketing	\$9,000	\$8,000	\$8,000	\$8,000	\$9,000
	Child nutrition	\$15,000	\$18,000	\$22,000	\$28,000	\$33,000
	Travel	\$3,000	\$5,000	\$7,000	\$9,000	\$15,000
	Other	\$6,000	\$8,000	\$10,000	\$15,000	\$17,000
	K - TOTAL Administrative & Support Operations	\$359,076	\$433,600	\$515,100	\$617,300	\$676,050
	Instructional:					
Instructional Contract	Staff Development	\$12,000	\$18,000	\$22,000	\$26,000	\$30,000
Classroom Technology	Software	\$6,000	\$5,000	\$5,000	\$8,000	\$10,000



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Books and Supplies	Instructional Materials	\$17,000	\$21,000	\$24,000	\$27,000	\$32,000
	Curriculum/Texts	\$22,000	\$26,000	\$30,000	\$34,000	\$38,000
	Copy Paper	\$2,000	\$3,000	\$4,000	\$5,000	\$6,000
	Testing Supplies	\$22,000	\$27,000	\$33,000	\$38,000	\$43,000
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$81,000	\$100,000	\$118,000	\$138,000	\$159,000
	K+L = M - TOTAL OPERATIONS	\$440,076	\$533,600	\$633,100	\$755,300	\$835,050

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**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
J - TOTAL PERSONNEL	\$968,895	\$1,345,330	\$1,688,145	\$1,943,600	\$2,230,110
M - TOTAL OPERATIONS	\$440,076	\$533,600	\$633,100	\$755,300	\$835,050
J+ M =N TOTAL EXPENDITURES	\$1,408,971	\$1,878,930	\$2,321,245	\$2,698,900	\$3,065,160
Z - TOTAL REVENUE	\$1,557,254	\$2,147,844	\$2,595,217	\$3,117,839	\$3,639,866
Z - N = SURPLUS / (DEFICIT)	\$148,283	\$268,914	\$273,972	\$418,939	\$574,706

**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.*

Charlotte Mecklenburg Schools continue to have challenges in achievement while facing a growing student population. Indeed, the recently released United Nation's population projection lists Charlotte as the "projected number one" fastest growing large city in America for the next two decades. With the evidence of the strain from population growth already affecting student achievement outcomes, we are eager to prepare a school in the model that worked so well for thousands of years, and now enjoys a growing resurgence in American educational choices.

BCCA has organized around a Classical Curriculum that intentionally builds the grammar of each subject (i.e., English, Math, Science) into the knowledge base of the student as the foundation of further intellectual formation, that includes logic (or dialectic reasoning) in the middle school years, and rhetoric in the years following our charter (High School). We also know that starting a school too big (for example, K-5) invites difficulties of moving into middle school years before organizational kinks get worked out. So, while we request a charter for the K-8 years, we want to build a solid foundation on which to grow into the remaining K-8 years.

We believe the demand for Classical education will be strong based on the growing evidence of excellence in charter classical movement that is best typified by the results attending the Great Hearts Academies in Arizona. They are continuing to outperform virtually all other schools through their diverse enrollments determined by lottery. Accordingly, with proper networking in the UNCC area, web site development, a speakers bureau, and other Board led activities we believe that we can generate a demand that will exceed our projects enrollment of 207 students in year one.

We believe that we could withstand a 5% shortfall in enrollment before we would have to face the difficult questions of which cuts to make. Please know that should our charter be granted then we will begin to approach the community through a speakers bureau to raise charitable funds in support of the school's mission. But should a budgetary cut need to be made then we would first seek to re-negotiate our lease with our Landlord, and then

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consider the extreme measure of reducing staff to a more minimum level.

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

In the event of unforeseen circumstances BCCA will utilize a strategy that will first seek to reach a wider geographic audience of Kindergarten through Second grade parents. This is the parent community with the strongest interest. We will also seek a further engagement with the business community to help them see the importance of classical education to their current workforce and the future workforce.

Assuming we still suffer from an insufficient enrollment to meet the full budget, then BCCA will reduce costs in the following order:

- 1) we will attempt to renegotiate the lease, or eliminate or reduce any nonessential fixed cost.
- 2) we will reduce or eliminate any non-essential, non-instructional variable costs (including non-instructional administrative salaries and benefits.
- 3) analysis and strategic reduction, consolidation or combination of expendable, non-essential instructional costs.

*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*

No.

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

1 to 17; or 1 to 18 inclusive of teacher's aides

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.*

The school will explore either hiring or contracting with qualified vendors for several administrative, accountability and staff development services, including services for speech therapy, occupational therapy, and physical therapy, as well as custodial services. We also carry some funds in the budget for routine daily classroom custodial issues needing attention prior to the contractor arriving for custodial matters. Contractors will be selected based on a number of factors including the contractor's experience and track record in the given field, their value to our program, and our ability to realize savings by outsourcing rather than hiring for their function. Of utmost importance will also be the contractors references and demonstrated integrity as well as the proven track record of their offerings. The Board will maintain strict oversight of any vendor/contractor and will regularly evaluate contractor performance.

The Board expects to contract for Power School services and already has a quote built into our budget. We will of course contract for the annual audit and preparation of the 990. This too is built into the budget.

Large purchases will be vetted by the staff person desirous of such an item, then presented to the Head of School. Should the Head see the value of such a purchase, then the Head will be responsible for presenting to the Board's Budget committee any item not already budgeted for approval. At that time

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If you have questions regarding the application process, please contact the Office of Charter Schools via email at [deanna.townsend-smith@dpi.nc.gov](mailto:deanna.townsend-smith@dpi.nc.gov).

any approval will follow the Board protocol for purchases.

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

BCCA is committed to offering a high quality instructional program in a public school K-8 environment. We believe we have to prepare students to succeed in a rigorous academic program that will prepare them well for High School. To fulfill this commitment we believe that BCCA must offer attractive compensation packages to instructional faculty, administrative leadership, and support staff. In addition the Board knows that the facility must be attractive, safe, accessible, and economically feasible.

Since the heart of education centers around the act of teaching and learning we know that the curriculum materials must be of high quality and presented in sufficient number so that all students are properly equipped. To this end the budget aligns with the mission, goals, instructional and facility needs in the following ways:

1) We will build our program around an exceptional Head of School that can evidence the mission of education in the character of their being. Accordingly we will offer a good starting salary and intend to build with this person in successive years. While our budgeting process is intentionally conservative, we want to see the evidence of growing enrollment before we raise our annual projected salary increase above a 2% target.

2) We know that the classroom experience - the art of teaching and the experience of learning are the foundation of student engagement. Therefore we seek to find one lead teacher for each grade level with the experience that offers maturity and wisdom for the younger teachers. Accordingly, we expect to employ a range surrounding the average budget number offered.

3) We want BCCA to be a school that encourages parent engagement where possible and will hopefully build on that in ways that include strengthening the car pooling program in successive years. Success in this area of concern should provide some savings in transportation that could release funds for the Board to consider advancing salaries, enhancing curriculum materials, and/or building the financial reserves.

It is our intention to grow the school experience to be so desirable that the evidence of our commitment to our mission, becomes evident in a reputation of being a well run and desirable school.

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.*

We expect the school to be so desirable that our speakers bureau and development work will be able to garner community philanthropic support. We are not building our budget on this expectation. But in time we expect that we can grow our school with community support. That said, fiscal best practices for a charter school include enacting policy that compels the Board to operate on a zero-based, balanced budget from year to year while maintaining a low debt to income ratio. Cost controls and revenue enhancement (i.e. fundraising) will be employed to maximize the potential of

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every dollar and to build savings / reserve funds. Any operating funds surplus will be committed in proportions to be decided by the Board for areas that include Savings, Staff development, curriculum support, facility repair and growth. The school does not have an arbitrary savings target for each given year, but fully understands the importance of building reserves to be able to manage unforeseen circumstances.

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

The Board intends to enter into an operating lease for its facilities. The Board is in the process of securing a Letter of Intent from one facility that will work very effectively for our School. If for some reason this negotiation falls through then the CNL realtor will go to work finding comparable facilities for the school.

We will enter into a long term lease with the entity that we engage. The goal is to keep lease payments affordable, so facilities costs and debt do not impact the school.

Items that the school cannot afford and are not considered critical to instruction will be purchased through accumulated reserves as an alternative to financing. Debt financing will remain a last resort.

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*

No assets are expected to be transferred to BCCA from other sources. It is expected that FF&E will be purchased using operating funds and that the facility lease will also be funded from operating revenues.

**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?*

BCCA will adopt both organizational level and functional level internal controls and will evaluate those controls annually to determine implementation approach and necessary modifications. Organizational and functional level internal control documents will be written and independent auditor will be asked each year to review the organizational and functional level internal control procedures and documentation, compare them to actual practices and to make recommendations to the Board for improvements.

Organizational level controls will document the organizational structure and operational nature of the school and include systems of integrity and values, management philosophy and operating style, training and commitment to competence, risk assessment, internal and external communication, and monitoring of the control environment.

To be more specific, BCCA's functional level internal controls will consist of a comprehensive set of written, functional level control accounts receivable, purchasing, cash disbursements, cash receipts, payroll (including E-verify), journal entries, financial reporting, and fixed assets and depreciation. Each functional level control document will identify and define source documents, enumerate segregated duties and functions, specify output reports and summaries, appoint an appropriate authorizer, and levels of authorization, provide procedures for error detection and correction.

To ensure organizational effectiveness the organizational control documents will be reviewed with the entire staff (including applicable vendors, consultants and contractors) annually and referenced throughout the year during staff development and other workshops. The functional level control documents will be reviewed with each employee, vendor, consultant or contractor to which the controls apply such as the business manager, financial management contractor, IT personnel, independent auditor, the Board treasurer and finance committee and BCCA's administrative leadership.

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

There are no known or possible related party transactions. Should any such circumstance arise the Conflict of Interest Policy pertains as indicated in the By-laws of BCCA.

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

The following firms are being explored to perform the annual, independent audit:

Batchelor, Trillery, and Roberts, LLP  
3605 Glenwood Ave.  
Suite 350  
Raleigh, NC 27612

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919 787 8212

Rebekah H. Barr, CPA  
5422 Boswellville Rd.  
Wilson, NC 27893  
252 230 6294

Thomas, Judy, & Tucker, PA  
4700 Falls of Neuse Rd.,  
Suite 400  
Raleigh, NC 27609  
919 571 7055

<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Explain the Instructional support 80 at 135. How will office function with only a half time clerical position with over 200 students? who is dealing with phone calls, parents picking up students, sick kids, teachers needing office support, etc? Is the type of instructional method described in the application realistic to implement with only 4 teacher assistants? How was the 85k figured determined for the administrator?	Buffy Fowler	Personnel Bu
Finance officer and clerical staff are half-time in budget. Is this feasible? Who will "man" the office during school hours? Is 1 elective teacher enough to serve 207 students? Will elective teacher teach multiple subjects (art, music, PE, etc.)? Explain instructional support (80 X \$135).	Sherry Reeves	Personnel Bu
Has money been allotted for contract services for students with disabilities (school psychology, speech/language therapy, transportation, occupational therapy, physical therapy)?	Glenn Allen	Personnel Bu
I would like more information on the "Instructional Support" lines.	Steven Walker	Personnel Bu
What us the 16,500 figure for Financial, assuming 8500 is audit cost?	Buffy Fowler	Operations B
Copier lease seems high while office supplies and paper costs are minimal. Transportation is not included in budget. Insurance costs are high. What are the "Other" costs listed under "Facilities" and "Other"?	Sherry Reeves	Operations B
Shouldn't transportation have at least a contingency amount funded in the event that students require transportation but can't participate in carpool? Can the applicant clarify the arrangement with the potential landlord with respect to utilities and up-fit?	Kevin Piacenza	Operations B
Budget surplus seems high.	Sherry Reeves	Total Expend
Can the applicant clarify accounting responsibilities for both daily accounting routines, and budget management? What will Power School services handle and what does in-house financial person handle? How is student accounting being handled?	Kevin Piacenza	Budget Narra
Narrative cites demand for classical education based on a successful school in Arizona. Is there an equal demand in Charlotte, NC?	Sherry Reeves	Budget Narra
Shouldn't the teacher to student ratio be 1 to 23 and 1 to 16 inclusive of teacher's aides as found in the curriculum and instruction section?	Brian Smith	Budget Narra

<b>Reviewer</b>	<b>Score</b>
Deanna Townsend-Smith	
Avril Smart	Pass
Sherry Reeves	Pass
Anthony Helton	Pass
Glenn Allen	
Buffy Fowler	Pass
Steven Walker	Pass
Robert McOuat	
Phyllis Gibbs	
Brian Smith	Pass
Becky Taylor	
Kevin Piacenza	Pass
Tracy Kelley	Pass
Tammi Sutton	



**VII AGREEMENT PAGE**

**Application Fee:**

*Pursuant to § 115C-218.1(c) 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 19, 2016 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 19, 2016 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-218.1(c).*

bonnieconeclassical

Date: 09/19/2016

**Applicant Signature:**

The foregoing application is submitted on behalf of Bonnie Cone Classical Academy (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: bonnieconeclassical

Board Position: Chairperson

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

Date: 09/19/2016

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

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

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

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

## OVERALL ASSESSMENT

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

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

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

<b><u>Total Subcommittee Votes</u></b>	
<b>No</b>	<b>Yes</b>

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>
3	5

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

### **Initial Screening**

<b>Mission, Purposes, and Goals</b>	Why is the professional development increased in the fifth year instead of the first year? How is history being addressed in academics? - theltoncsab
<b>Education Plan</b>	- theltoncsab
<b>Governance and Capacity</b>	(1) Applicant has 24 months after approval to obtain tax exempt status (2) Resume and national background check missing for Marty McCarthy (3) National Background check missing for William Mills, Stephanie Newbrough, Louise Baucum, and Judy Russo (4) Board Member Resume Form missing for Brian Lisk  - theltoncsab
<b>Operations</b>	- theltoncsab
<b>Financial Plan</b>	- theltoncsab
<b>OVERALL</b>	- dtsmith840  - theltoncsab  - theltoncsab

### External Evaluator

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> What professional development is going to be offered to staff for classical education, FOSS, and other programs? - brian_smith2</p> <p><u>Mission Statement</u> Why is history the organizing principle behind the mission and purpose of the organization? What specific student needs justify the use of sequential curriculum aligned to brain development? How can you clarify the connection between academic choice and curriculum aligned to the stages of a child's brain development? Is there a need for such curriculum in the current public school setting? - mssmart</p> <p><u>Mission Statement</u> Short, concise mission statement that makes it clear that the school is about classical education. - dswalker</p> <p><u>Educational Need and Targeted Student Population</u> Can the applicant provide any specific insight or evidence clarifying why the classical approach would be effective with the target population? Has the applicant gathered any data to support need (surveys, public meetings, questionnaires)? - kpiacenza</p> <p><u>Educational Need and Targeted Student Population</u></p>
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	<p>Has there been any survey of the community to determine interest? - buffy_fowler</p> <p><u>Educational Need and Targeted Student Population</u> The group does not provide an articulation of how or why the CMS was chosen or why the specific classical model will meet the needs of CMS students. There is no discussion of the research basis for the selected educational program. What is the connection between the schools name and the CMS community? What about the classical (grammar, logic, rhetoric) approach will help close the gap and how does it specifically differ from what families have in CMS. What specific skill gaps will CMS students come with that your program design is equipped to remedy? - kellelytracy</p> <p><u>Educational Need and Targeted Student Population</u> Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>. - dtsmith840</p> <p><u>Educational Need and Targeted Student Population</u> How does the sequencing and stages of classical education align with the Common Core and NC State Standards? What data indicate a learning deficit can be addressed by curriculum aligned with the sequential stages of development? What research has been collected by the applicant (i.e., from parents or the surrounding community) to justify the application of classical sequencing approach with potential student population? In what way does the curriculum model presented here appeal to the sensibilities of currently home-schooled or private school students? How does the enrollment and projected growth interact with ADM in CMS for comparable K-8 schools? What are the explicit similarities/differences between the proposed education plan and that of the surrounding CMS k-8 public schools? - mssmart</p> <p><u>Educational Need and Targeted Student Population</u> Targeted population is non-specific other than the proposed area of the school's location. Applicant projects population will mirror that of CMS. - sherryreeves</p> <p><u>Purposes of Proposed Charter School</u> Explain how teachers and administrators will be held accountable for meeting measures. - buffy_fowler</p> <p><u>Purposes of Proposed Charter School</u> The group does not outline the PD opportunities teachers will receive to support the classical (rhetoric, grammar, logic) model which is the core of the overall school design); as a result the purposes are not clearly aligned with the proposed mission--to provide a classical education model. The group's description of how it will improve student learning is not sufficiently specific and not meaningfully targeted or focused on improving academic outcomes for the targeted student population. Discuss evidence to support contention that the classical education approach has a record of success in educating lower level learners. How does the specific curriculum lend itself to individualized instruction in a way and with more intentionality than the LEA or other approaches in CMS. The discussion of accountability is not discussed in terms of creating a data driven learning environment. There is no discussion as to how the school as a whole will hold itself accountable or how it will know that the instructional program is effective. The issue of accountability rests with the teacher who discovers that learning is not taking place rather than school leaders holding teachers accountable for student learning. The group attempts to address 5 out of 6 legislative purposes but addresses none of them with the necessary</p>
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	<p>intentionality that instills confidence that they will have a positive, sustainable, and meaningful impact on student learning. Discuss your core beliefs on education, student learning and how best to close the achievement gap. - kellestracy</p> <p><u>Purposes of Proposed Charter School</u> Legislative Purpose 2. How can you provide more detail about the formative and summative evaluation and tracking of student achievement? What systems will the administration use to monitor and record observation and performance data? Legislative Purpose 3. What additional educational opportunities/choices are afforded to parents beyond a smaller community? Legislative Purpose 4. What evidence connects a classical education approach to student outcomes in K-8? Legislative Purpose 5. Beyond assessments, what features of the curriculum are designed to support high risk students? How can you explicitly connect the key components of classical curriculum to achievement outcomes? Legislative Purpose 6. How does classical curriculum offer innovative instructional approaches? - mssmart</p> <p><u>Purposes of Proposed Charter School</u> Are there many licensed teachers who are trained in classical education? How will you assure that staff is appropriately equipped to teach using this model? Will intensive professional development be offered before school begins Year 1? Provide specific research that demonstrates how a classical education model is proven effective with low achieving students. - sherryreeves</p> <p><u>Purposes of Proposed Charter School</u> I agree with the sentiment in number 2, and it is very important to have highly qualified teachers that are able to discern the growth of a student. Tests are great tools, but an involved teacher can often find the trouble areas before the test could. - dswalker</p> <p><u>Goals for the Proposed Charter School</u> If Reading or Math targets are not met, what adjustments will be made? How are surrounding schools performing? - brian_smith2</p> <p><u>Goals for the Proposed Charter School</u> Can the applicant provide and discuss available data (baseline) on target population to establish "attainability" of goals? - kpiacenza</p> <p><u>Goals for the Proposed Charter School</u> How does the 70% in reading and 75% in math of year 1 compare to the CMS school district? Is this realistic when compared to the surrounding schools you will be pulling from described in the application as low performing? What information or criteria was used for percentages for special education and EL students? How do you define minorities? By stating you are locating near the UNCC campus you are targeting a diverse population and choosing a method that promotes individualization, why do you project a 15 point achievement gap? - buffy_fowler</p> <p><u>Goals for the Proposed Charter School</u> The professional growth goals are not specific or measurable. There is no discussion of how the school will link PD with student outcomes. Instead, the focus is on attending and providing PD with no mention of how to measure the effectiveness of the PD, or how it</p>
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	<p>will be followed up on or implemented. The PD "goals" are not aligned with the classical logic, rhetoric, grammar approach so there is not way for the school to measure the effectiveness of the instructional program as a whole.</p> <p>The financial goals for the board are not measurable or reasonable in light of its fiduciary duty. The financial goals for the school are not measurable or specific and include no fiscal or financial targets. There is a significant lack of intentionality and understanding of what are the most critical financial measures to have in place for the school and the board(i.e. cash on hand, clean audits, strong internal controls, debt management etc).</p> <p>Please describe the board and school level goal setting process. The process the board intends to use to monitor academic and school level goals is insufficiently comprehensive and lacking in fundamental details like targets, process, training, desired outcomes, strategic planning, accountability structures etc. - kellelytracy</p> <p><u>Goals for the Proposed Charter School</u> What is the justification for delaying differentiated/personalized professional development until year 5? Are instructors expected to receive the same training for the first 4 years? - mssmart</p> <p><u>Goals for the Proposed Charter School</u> Why lower standards specifically for exceptional children and minorities? Section detailing professional development growth goals is very confusing. Goals in general lack specificity and measureable terms. - sherryreeves</p> <p><u>Goals for the Proposed Charter School</u> Attainable goals and I like the use of MAP testing so that Board can also keep track of the academic progress that the teachers are seeing in the classroom. - dswalker</p> <p><u>Goals for the Proposed Charter School</u> Clearly Classical focused in this section. MAP testing is a solid measuring tool. - theltoncsab</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> The response does not include an articulation of the proposed assessment strategies that the school will use to confirm that students are learning and the instructional program is effective or needs to be adjusted to fit the specific needs of the student population. There is no documented evidence to support that the classical triduum approach will have a direct and meaningful impact on student learning for the targeted stud population. Describe the 3 main instructional strategies (inductive instruction, cooperative learning, direct instruction). - kellelytracy</p> <p><u>Instructional Program</u> How does can the applicant make the connection between this approach and high risk student populations or students of color explicit? How does the assessment strategy align with the classical instruction approach and the stages of the child's development? Where are learning benchmarks assigned on the learning trajectory? - mssmart</p> <p><u>Instructional Program</u> How does the classical education model align with Common Core standards? - sherryreeves</p> <p><u>Instructional Program</u> A good explanation of the classical model. - dswalker</p> <p><u>Curriculum and Instructional Design</u></p>

<p>What research was used to arrive at the usage of traditional calendar over a year round calendar? How are Spalding, Harvey, and Touchstone discussion project aligned? How will you know whether the students did better before coming to the charter school since most students are beginning with you? What professional development will be given for inquiry-based or classical instruction? Will FOSS be used for At-Risk students? What professional development will be provided for FOSS? - brian_smith2</p> <p><u>Curriculum and Instructional Design</u> Where is the model currently being used and what are the results with a population like the stated target population? Can an existing program or other resource be used for identifying possible pitfalls, best practices for daily routines, schedules, etc.? Are the various elements cited (Singapore Math, Spalding Reading, Touchstone, Foss etc. typically used in similar classical programs? How did the applicant decide upon these? - kpiacenza</p> <p><u>Curriculum and Instructional Design</u> How will the 4 teacher assistants be used spread across 9 classrooms? Explain more about how an individualized program will be implemented in classrooms of 23 students with only 4 teacher assistants. What are the number of instructional hours represented in the calendar in the appendix? - buffy_fowler</p> <p><u>Curriculum and Instructional Design</u> Please describe how core knowledge will integrate with the classical grammar, rhetoric, logic approach and Socratic method, Singapore math, Spalding, and FOSS curriculum frameworks and why they were selected and the selection process and how each decision will have a positive impact on student learning for the target population. Overall, the curriculum and instructional design of the proposed school is a cacophony of disconnected instructional tenants without cohesion or foundational basis for selection. The response does not present a theory for how best to educate at risk students, ELL, or struggling tier I learners. The response provides educational jargon that is neither clear or concise. - kellestracy</p> <p><u>Curriculum and Instructional Design</u> Given the subjectivity of the guiding principle, how can teachers measure their own understanding of the instructional approach and education plan? - mssmart</p> <p><u>Curriculum and Instructional Design</u> Application initially indicates that the school will operate on a year-round model but attached calendar is based on a traditional model. Which is correct? Statement about remediation strategies for "weak" students is unclear. Are there specific strategies within the classical model designed to bring students with deficiencies to grade level? Explanation of how instructional plan will ensure students are ready to transition from grade to grade is quite confusing. (goal of assessments is not to point out what a student does not know, but to encourage each student to learn; students will progress as well or better than they did before attending the charter school). - sherryreeves</p> <p><u>Curriculum and Instructional Design</u> While the class size may seem a little high at first glance, I have seen this size work in</p>
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	<p>other schools that employ a similar model as described here. - dswalker</p> <p><u>Special Programs and "At-Risk" Students</u> Who will make the final decision on placement, advance placement, and retention/promotion of the students? - brian_smith2</p> <p><u>Special Programs and "At-Risk" Students</u> Are there specific intervention "trigger points" and steps associated with the approach? - kpiacenza</p> <p><u>Special Programs and "At-Risk" Students</u> What is your plan for identifying at risk students that are not already identified as a student with disability? What is the process for identifying and monitoring their progress while receiving intervention(s)? - kevin_allen</p> <p><u>Special Programs and "At-Risk" Students</u> The description goes directly into students being served by EC teachers. Can you describe the steps put in place before students are identified EC or don't qualify for EC services? The programs mentioned are the same programs identified for all students, what other strategies will be used with students that are struggling? Are you familiar with the ELL testing in place within the accountability department in the NC public schools? The test mentioned is a different test than what is used in NC public schools to identify ELL students. - buffy_fowler</p> <p><u>Special Programs and "At-Risk" Students</u> The schools plan for how it will support students not on track to proficiency in math and ELA is incomplete. There is no evidence that time within the school day will be set aside for individualized support. Overall, the response does not describe the structures necessary for how the school will provide a tier level of instruction, a data driven approach to prevention or early detection, and support for students who experience learning r behavioral challenges, including ELL and students with disabilities. Please clarify acronyms used without definition including, EC and ESE. Please describe the type of informal assessments will be used to progress monitor through the school year. How will this be tracked? Applicant needs to clarify what is meant by "Students needing assistance will be supported by caring teachers, peer tutors, an expanded tutoring plan after school and assistance in other subjects by utilizing reading in the content area techniques and aides." What specific system will be in place to progress monitor; what specific data will be used from this system to drive instructional decisions throughout the process? Within this system of interventions, what structures or process will be put in place to move students along a continuum of services and change placements according to identified progress or needs. The response does not provide a research based intervention plan that includes flexible tiers to supplement or enhance the curriculum for tier I students needing additional supports. Please provide an explanation of what is intended by the statement "Students are assessed continually to determine mastery of skills."  Overall, the responses in this section provide very few details as to how the school intends to provide tiered instruction and adequate learning time. There are too few details and little information to suggest that the team has the level of understanding necessary to have a positive impact on student achievement (i.e. ELL assessment) - kelleyracy</p> <p><u>Special Programs and "At-Risk" Students</u></p>
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Clarify evaluation separate than monitoring. What data is gleaned from evaluation and how does that filter into selecting instructional strategies? - mssmart

Special Programs and "At-Risk" Students

Provide specific research that demonstrates how classical model is successful with lower level learners.

How has Spalding program been used to "prevent and correct learning disorders"?

Information provided in the Special Programs and At-Risk students section indicates lack of knowledge about special education, 504, EL, and AIG programs.

- sherryreeves

Exceptional Children – Identification and Records

"Once parental consent for testing is obtained, BCCA will ensure that the initial evaluation is completed within 60 school days (cumulative)." Policy 1503-2.2 states (c) Timeline for initial referral. (1) Evaluations must be conducted, eligibility determined, and for an eligible child, the IEP developed, and placement completed within 90 days of receipt of a written referral

"Within 30 days of enrollment at BCCA, records will be requested"--Could this result in delay of providing FAPE to students with disabilities that could result in providing compensatory education? - kevin\_allen

Exceptional Children – Identification and Records

Explain more about the RTI process that will be used to identify students with disabilities. Tier III was mentioned, what happens prior to Tier III - buffy\_fowler

Exceptional Children – Identification and Records

The response indicates a basic understanding of how records should be kept but there is no discussion of the requirements for 504 plans and accommodations. - kellelytracy

Exceptional Children – Education Programming

This is a very boilerplate response. It does not align with the overall educational model described. There are virtually no details provided that illicit confidence that the group understands and appreciates how services for EC students will mirror general education services. There is no mention of the classical model and how it translates for EC students. There is no mention of groups core beliefs about educating EC students and how the primary instructional strategies will also be used to support EC students. The response does not show how the EC plan will align with the overall proposed curriculum, methods, or school mission. - kellelytracy

Exceptional Children – Education Programming

3.a. Is a 30 day information request window aggressive enough to expedite the exchange of student profile information in support of immediate and accurate placement at the beginning of the academic year?

How the the overall guiding principle of the charter school aligned with curriculum/instruction for exceptional children? - mssmart

Student Performance Standards

Who will make the final decision on retention/promotion of the students in case there is a tie within the team?

- brian\_smith2

Student Performance Standards

	<p>"BCCA will use a quarterly reporting schedule that will coincide with Parent-Teacher conferences." - How will this feedback be communicated? How does the "report card" provide feedback in concert with the "Classical" model? - kpiacenza</p> <p><u>Student Performance Standards</u> How do the goals in question one relate to the goals listed in the Mission, Purpose, and Goals section. If percents of students on or above grade level is predicted to increase each year then doesn't that mean some students will need to show more than a year's grow? - buffy_fowler</p> <p><u>Student Performance Standards</u> The response does not align with previous sections (i.e. Goals section) indicating NWEA MAP would be used by the board to progress monitor student achievement. Will the school use NWEA to monitor student achievement and will it also inform instructional decision making process (i.e. interventions)? Applicant responses in this section are not clear, specific, measurable, attainable, time specific and do not denote high expectations for student achievement. Promotion standards appear to be very subjective and arbitrary. Please expand on what is meant by "classroom performance" how will the school develop norms for promotion decisions? What additional performance data will be used to make this decision other than EOY state assessments? How will parents be informed of student progress if their is a problem will they find out only at the end of the year? How will teacher generated pre and post assessments be normed to ensure high levels of rigor? Overall, the education plan and specifically the goals do not support the overall academic goals outline in question 2 and neither do the promotion policies. What mission specific goals will the school use to assess effectiveness of the overall program? - kelleltracy</p> <p><u>Student Performance Standards</u> What steps will be taken to assess students beginning competencies in order to assess and project benchmarks for growth? What is the plan for curriculum development to accommodate the addition of new grade levels each year? - mssmart</p> <p><u>Student Performance Standards</u> I would like to hear more about 1. I do not think the current answer is sufficient standing alone but I do think that other portions of the application explain the process of how the school will measure student achievement on an ongoing basis. - dswalker</p> <p><u>Student Conduct and Discipline</u> What is the District Code of Conduct for discipline? Is that different from the Students Code of Conduct Handbook? - brian_smith2</p> <p><u>Student Conduct and Discipline</u> Explain more about individual student behavior development. The Champs model appears to focus on the role of the teacher, how will discipline issues be handled on a daily basis? - buffy_fowler</p> <p><u>Student Conduct and Discipline</u> The student management system does not align with the overall mission and proposed education plan. Use of CHAMP and its components lack cohesion and the discipline plan is not aligned to overall mission and key design elements of classical education i.e. virtues, character development, philosophy. - kelleltracy</p> <p><u>Student Conduct and Discipline</u></p>
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	<p>Describe how the district code of conduct align to classroom management strategies? How are behavioral/discipline issues elevated? - mssmart</p> <p><u>Student Conduct and Discipline</u> Why would you adopt the district's student code of conduct? Shouldn't you create your own that is aligned to the principles of classical education? - sherryreeves</p> <p><u>Student Conduct and Discipline</u> A complete review of the classical model. A clearer, strengthen section on how you will measure success across the board - theltoncsab</p>
<p><b>Governance and Capacity</b></p>	<p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Describe the removal process of a board member - buffy_fowler</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Will school leader evaluations include a student performance evaluation? If so what assessment will be USED? Describe the assessment that will be used to formulate student performance goals to be used by the board for self evaluation? The proposed governing board lacks the necessary and critical skill sets especially with regard to financial and fiscal expertise and education and school leadership (i.e. district, state, charter school experience). - kellelytracy</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Provide more clarity on the number of board members, quorum, voting power and explicitly describe the evaluation guidelines and procedure providing timeline and benchmarks in the academic year. - mssmart</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> I like the diversity of professions on the board and the fact that there are educators on the board. - dswalker</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - mssmart</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - dswalker</p> <p><u>Staffing Plans, Hiring, and Management</u> The organization chart is confusing and disjointed. It is unclear how the school will be organized and how if at all a distributive leadership chain will be structured. The narrative describes the role of teacher leaders, but they are not included in the org chart. The leadership vision does not align with plans for mentor teachers, teacher teams and the schedule does not clarify how common planning time will be structured or what the expectations are for teacher meetings or teacher leaders. - kellelytracy</p> <p><u>Staffing Plans, Hiring, and Management</u> What steps are in place to make sure the applicant's teaching philosophy aligns to the mission of the organization? What stipulations are in place to ensure adequate racial ethnic representation among faculty? How will the NC Educator Evaluation process align with the boards teacher evaluation process? - mssmart</p> <p><u>Staffing Plans, Hiring, and Management</u> ESL and ELL teachers are listed but no exceptional children's teacher. No social worker or counselor on staffing plan. Head of school is delegated authority to hire and fire staff-this should be the responsibility</p>

<p>of the board. - sherryreeves</p> <p><u>Staff Evaluation and Professional Development</u> Are there any teacher practices that need to be evaluated in the "Classical" model that aren't clearly addressed by the SBE instrument? Will there be sufficient training time before opening for teachers to become proficient with the "Classical" model, Singapore Math, etc.? - kpiacenza</p> <p><u>Staff Evaluation and Professional Development</u> The response does not describe a system for how school leaders will ensure teachers are delivering high quality rigorous instruction through a series of pop in observations and teacher feedback. The response dose not describe PD that aligns with implementing a classical school program. How will teachers be guided in what it means to deliver the grammar, rhetoric, logic model? How will student learning drive PD decisions? - kelleltracy</p> <p><u>Marketing Plan</u> There is \$9000 planned for marketing the first year and \$8000 each year thereafter. What is the reasoning for the first year only costing \$1000 more when you are recruiting over 200 students and only 69 students in following years? Explain how the \$9000 is spent in implementing this marketing plan? - buffy_fowler</p> <p><u>Marketing Plan</u> How will marketing reach parents and families who do not have internet/ digital media access? What specific marketing strategies will be applied to recruiting high needs populations? - mssmart</p> <p><u>Parent and Community Involvement</u> Explain in more detail how parents will be partners, including what does parent involvement look like on a daily basis. The description detailed how the school will communicate with families. The term "On Boarding" is used several times in the application. Explain what is meant by on boarding. - buffy_fowler</p> <p><u>Parent and Community Involvement</u> Where does the parent and community involvement plan include specific provisions for communities of color as this group represents almost 50% of students in the county? - mssmart</p> <p><u>Admissions Policy</u> What is the enrollment period to accept applications to determine whether a lottery is needed or not? - buffy_fowler</p> <p><u>Projected Student Enrollment (Table)</u> How will you meet you student enrollment numbers? Do you have a contingency plan if you do not meet your student enrollment numbers? - brian_smith2</p> <p><u>Projected Student Enrollment (Table)</u> See questions in prior section about realistic numbers. - buffy_fowler</p> <p><u>Projected Student Enrollment (Table)</u> Applicant needs provide a rationale for why K-2 grade enrollment is realistic for year one. - kelleltracy</p>
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	<p><u>Projected Student Enrollment (Table)</u> Please specify the number of schools in the surrounding area that the applicant expects to receive applicants from - mssmart</p> <p><u>Projected Student Enrollment (Table)</u> What was the driving force behind the decision to start the school as a K-2? How did you determine the projected enrollment? - sherryreeves</p> <p><u>Projected Student Enrollment (Table)</u> I have staffing questions around EC. I do not see specifically EC teachers listed. - theltoncsab</p> <p><u>Weighted Lottery</u> Where do you demonstrate forward thinking around recruitment/application process to verify if applicants meet school demographic requirements? - mssmart</p> <p><u>Weighted Lottery</u> N/A - dswalker</p>
<p><b>Operations</b></p>	<p><u>Transportation Plan</u> If carpooling is not an option for a student(s) who needs transportation, what is the applicant's contingency plan? - kpiacenza</p> <p><u>Transportation Plan</u> How will you provide transportation to a student with a disability if it is identified as a related service on their IEP? - kevin_allen</p> <p><u>Transportation Plan</u> The proposed area around UNCC is described as diverse and the targeted student population is described as seeking a diverse student population. How will not providing transportation in the first year, when you are recruiting over 200 students affect diversity? What strategies will be put in place to ensure transportation does not affect diversity? If the lack of transportation does affect diversity in the first year how will BCCS recover from the lack of diversity when only enrolling 69 new students each year as opposed to over 200 the first. What is the plan for students who are unable to carpool and cannot attend without transportation? How will you budget to ensure students needing transportation are taken care of? - buffy_fowler</p> <p><u>Transportation Plan</u> How does this transportation plan make specific plans for special populations in terms of access to this school as an option? - mssmart</p> <p><u>Transportation Plan</u> Will offering no transportation in year 1 be a barrier to attracting students? - sherryreeves</p> <p><u>Transportation Plan</u> I would like something more concrete as to how a student without other options will gain access to the school in year one. - dswalker</p> <p><u>School Lunch Plan</u> How will students and families be identified as needing school lunches prior to students showing up without a meal or being asked to attend a meeting? How will the school lunch procedure for students who are economically disadvantaged and in need of lunch support be communicated prior to the enrollment process?</p>

	<p>How does no formal lunch support procedure in the first year affect diversity as described in the targeted population? How will the school recover after year one if diversity is affected? - buffy_fowler</p> <p><u>School Lunch Plan</u> How will bringing a bag lunch impact the potential of attracting students who qualify for free/reduced lunch program? Will the school have lunch on hand for those students who do not bring their lunch to school? - sherryreeves</p> <p><u>Civil Liability and Insurance</u> Can the applicant clarify the total cost @ \$26,900? It seems higher than is typical. - kpiacenza</p> <p><u>Civil Liability and Insurance</u> Does this figure match what is in the budget? - buffy_fowler</p> <p><u>Civil Liability and Insurance</u> This figure is much higher than figures reported by other charter applicants. - sherryreeves</p> <p><u>Civil Liability and Insurance</u> This quote seems a little on the high side and I believe the numbers were put into the table incorrectly but appear to be correct in Appendix L. - dswalker</p> <p><u>Facility and Facility Contingency Plan</u> Have assessments for up-fitting the Oasis Shrine Temple been made? - kpiacenza</p> <p><u>Facility and Facility Contingency Plan</u> Applicant should provide a rationale for wanting to be near UNCC, as the application does not describe a formal or informal partnership between the proposed school and the University. If group anticipates a partnership that should be made clear. - kellelytracy</p> <p><u>Facility and Facility Contingency Plan</u> It seems that no transportation or lunch program could discourage low income families from attending - theltoncsab</p>
<p><b>Financial Plan</b></p>	<p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Has money been allotted for contract services for students with disabilities (school psychology, speech/language therapy, transportation, occupational therapy, physical therapy)? - kevin_allen</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Explain the Instructional support 80 at 135. How will office function with only a half time clerical position with over 200 students? who is dealing with phone calls, parents picking up students, sick kids, teachers needing office support, etc? Is the type of instructional method described in the application realistic to implement with only 4 teacher assistants? How was the 85k figured determined for the administrator? - buffy_fowler</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Finance officer and clerical staff are half-time in budget. Is this feasible? Who will "man" the office during school hours? Is 1 elective teacher enough to serve 207 students? Will elective teacher teach multiple</p>



	<p>subjects (art, music, PE, etc.)?                  Explain instructional support (80 X \$135). - sherryreeves</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u>                  I would like more information on the "Instructional Support" lines. - dswalker</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>                  Shouldn't transportation have at least a contingency amount funded in the event that students require transportation but can't participate in carpool? Can the applicant clarify the arrangement with the potential landlord with respect to utilities and up-fit? - kpiacenza</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>                  What us the 16,500 figure for Financial, assuming 8500 is audit cost?                  - buffy_fowler</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u>                  Copier lease seems high while office supplies and paper costs are minimal.                  Transportation is not included in budget.                  Insurance costs are high.                  What are the "Other" costs listed under "Facilities" and "Other"? - sherryreeves</p> <p><u>Total Expenditure Projections (Table)</u>                  Budget surplus seems high. - sherryreeves</p> <p><u>Budget Narrative</u>                  Shouldn't the teacher to student ratio be 1 to 23 and 1 to 16 inclusive of teacher's aides as found in the curriculum and instruction section? - brian_smith2</p> <p><u>Budget Narrative</u>                  Can the applicant clarify accounting responsibilities for both daily accounting routines, and budget management? What will Power School services handle and what does in-house financial person handle? How is student accounting being handled? - kpiacenza</p> <p><u>Budget Narrative</u>                  Narrative cites demand for classical education based on a successful school in Arizona. Is there an equal demand in Charlotte, NC? - sherryreeves</p>
<p><b>OVERALL</b></p>	<p><u>Grade Levels Served and Total Student Enrollment:</u>                  How are the projected enrollment numbers in alignment with the local LEA or charter schools in the area? - brian_smith2</p> <p><u>Grade Levels Served and Total Student Enrollment:</u>                  Is 69 students per grade level reasonable for a new school in a system operating with the number of existing charter schools in the CMS district?                  How will no transportation and students being expected to pack a lunch in the first year impact these numbers?</p> <p>Here the box is checked that it will be a year round school but in description it describes the rationale for a traditional calendar. Which is correct? - buffy_fowler</p> <p><u>Grade Levels Served and Total Student Enrollment:</u>                  The enrollment figures are unrealistically large for year one. Please explain your reason for opting for going on a year round schedule? How will that decision impact the quality of learning. How will recruitment strategy be structured to enroll 2nd graders? - kelleytracy</p>



	<p><u>Grade Levels Served and Total Student Enrollment:</u>                  How many charters and traditional public schools are located in the region near UNCC?                  Is there significant interest from parents in the area for a classical school? - sherryreeves</p>
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<b>Charter School Advisory Board Subcommittee</b>	
<b>Mission, Purposes, and Goals</b>	<p>The CSAB wanted information on the survey information proposed in the application. Also, more information was wanted on the goals proposed in the application. A proposed board member outlined the reasoning for setting the goals at the level it established and the goals are EOG related. The CSAB read a specific goal outlined in the application and tried to gain understanding on the specific goal and if the proposed board was talking growth or proficiency. The CSAB also drilled the math goals outlined in the application and the reason it was written the way proposed. The proposed board member outlined that minority meant in the application was based on race and socioeconomic. The proposed board member was given the opportunity to revise the math goal in the interview and revised and clarified for the CSAB. A proposed board member outlined the people referenced in the survey and did not have a response to specific numbers from the surveys conducted. The CSAB asked about the proposed location and the number of charter schools in close proximity. A proposed board member outlined ACE is the closest and they have visited and that the established school is not classical. Another board member explained the facility location proposed. The CSAB stressed that meeting the enrollment goal in the proposed area is important for the school. The board outlined it was probably a mistake to differentiate the goals by subgroup.</p>
<b>Education Plan</b>	<p>The CSAB wanted specific information on the classical model and the board's understanding of the model. The proposed board chair explained the classical model. The CSAB drilled the proposed assessment tools and strategies and the relation to the classical model. One board member outlined the visits he conducted and how the classical education can meet the needs of all students. The CSAB drilled the proposed board on what the board thought would be its greatest challenges related to state testing. The board chair outlined the classical education experience will go above and beyond the state expectations on student learning.</p>
<b>Governance and Capacity</b>	
<b>Operations</b>	<p>The CSAB drilled the transportation and lunch plans for the proposed school. The board member present outlined that if its really worth it the parents will find a way to make it work. The plan is to have one bus in the first year and adding a bus in the second year. The CSAB wanted to know if the proposed school really understood the population they are targeting. A proposed board member detailed there would be community resources and they do not intend to have a formal lunch program for the school. The hope for the bus is to go to a central location.</p>
<b>Financial Plan</b>	
<b>OVERALL</b>	<p>Mr. Walker outlined the proposed application is better than from the previous round. Mr. Maimone surmised he opened a classical school and did not start with FRL or busing. Mr. Sanchez outlined that being proactive is important with the pieces proposed in the application and the targeted student population. Mr. Quigley detailed the plan has not been</p>

	<p>thought through and this is disappointing given this is a second consideration for the applicant group. Mr. Sanchez stressed that the applicant group has not fully addressed in writing or in the interview an understanding of its proposed targeted student population. Mr. Helton questioned if the application should be thrown out for a bad answer and reinforced the lunch program offered at Mr. Maimones school. Mr. Sanchez pointed to the writing detailed in the application which stressed the academic expectations for minority students will be lower. Mr. Walker outlined that the education plan is good and will work and has worked in other places. Mr. Maimone made a motion to move the applicant group forward to Ready to Open. Mr. Helton seconded. Mr. Sanchez concluded the education plan was much improved; however, He outlined that the application outlines what a group is to do. His biggest concern was the enrollment. He thinks the interview and the application are both important and the group caused him to lose confidence. Ms. Parler outlined she thinks the pros outweigh the cons. Ms. Turner thinks the education plan is fine and the school will be fine as they will not get the children they are targeting in the application. Mr. Quigley urges the school to work with the Office of Charter School to implement a weighted lottery if approved. The motion passed 5 - 3. Ms. Turner, Mr. Quigley, and Mr. Sanchez dissented.</p>
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### Overall Summary

<p><b>Initial Screening</b>  <b>09/30/2016</b></p>	<p>The Office of Charter Schools deemed this application incomplete on September 30, 2016. The following is needed to complete the evaluation of this application:</p> <ul style="list-style-type: none"> <li>(1) Resume and national background check missing for Marty McCarthy</li> <li>(2) National Background check missing for William Mills, Stephanie Newbrough, Lousie Baucum, and Judy Russo</li> <li>(3) Board Member Resume Form missing for Brian Lisk</li> </ul> <p>Applicant responded to the incomplete submission request on October 4, 2016.</p>
<p><b>Application Review</b></p>	<p>OCS provided a brief overview of the proposed application including the enrollment over five (5) years, proposed county, and mission of the proposed school. One board member was present for the application review, discussion, and clarification opportunity.</p> <p>The Policy Committee (PC), led by Mr. Steven Walker detailed the improvements to the application regarding improving the classical education components. Mr. Walker also encouraged the board member present to read the previous meeting minutes from the last application round and to be prepared to answer questions.</p> <p>Mr. Helton made a motion to move Bonnie Cone Classical to the full CSAB for interview. Ms. Reeves seconded. The committee motion passed unanimously.</p> <p>Mr. Helton made a motion to the CSAB for Bonnie Cone Classical to receive an interview with the full CSAB. Mr. Maimone seconded. The motion passed unanimously.</p>
<p><b>Application Interview</b></p>	<p>The Office of Charter Schools provided a brief update of the proposed school. 4 proposed board members introduced themselves to the CSAB and provided a brief professional history and respective role on the board of directors for Bonnie Cone Classical. 3</p>

Bonnie Cone Classical Academy - Bonnie Cone Classical Academy (BCCA) will equip students with the tools of learning to think critically, reason effectively, and communicate persuasively through the rigors of a classical education.

	members were not able to attend and provided letters to explain the absences.
<b>OVERALL</b>	The applicant group was recommended to begin the Ready to Open Process. The motion passed 5 - 3. Ms. Turner, Mr. Quigley, and Mr. Sanchez dissented.