

Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.



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:

Glenn Allen
Jessica Kelly
Jennifer Gnann
Deanna Townsend-Smith
Steven Walker
Alex Quigley
Walter Finnigan
Phyllis Gibbs
Robert McOuat
Shannon Sellers
Sherry Reeves
Tammi Sutton
Anthony Helton
Kebbler Williams

Date of Review:

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09/30/2016

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Carolina Charter Academy - A CFA

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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AGREEMENT PAGE _____

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Applicant Signature: 80

Total External Evaluator Votes 82

Total Subcommittee Votes 82

CSAB Votes 82

Initial Screening 82

External Evaluator 83

Charter School Advisory Board Subcommittee 99

Overall Summary 101

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Carolina Charter Academy - A CFA

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: *Nathaniel Macon Academy, Inc.*

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: *Jaime Stoops*

Title/Relationship to nonprofit: *Board Member*

Mailing address: 2507 Belvinwood Drive
Fuquay Varina NC 27526

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

E-Mail address: *jaimestoops@yahoo.com*

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

County: WAKE

LEA: 920-Wake County Schools

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

No:

Yes:

If so, provide the name of the third party person or group. TeamCFA

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

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

TeamCFA provides basic application support for education planning and guidance on technology implementation, curriculum and at-risk support language. Our school will continue to work with TeamCFA once approved as we will become a Challenge Foundation Academy. TeamCFA will also appoint ONE board member to serve on the board of directors during the planning year.

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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:

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? Nathaniel Macon Academy, Inc.

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)

Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05,06	373

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Second Year	K,01,02,03,04,05,06,07	448
Third Year	K,01,02,03,04,05,06,07,08	523
Fourth Year	K,01,02,03,04,05,06,07,08	573
Fifth Year	K,01,02,03,04,05,06,07,08	598

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

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

carolinacharter

Jaime Stoops, Board Chair

Signature

Title

carolinacharter

09/19/2016

Printed Name

Date

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Section I: Application Contact Information **Reviewer** **Page**
Concerns and Additional Questions **Reference**

<u>Reviewer</u>	<u>Score</u>
<u>Glenn Allen</u>	
<u>Jessica Kelly</u>	<u>Pass</u>
<u>Jennifer Gnann</u>	<u>Pass</u>
<u>Deanna Townsend-Smith</u>	
<u>Steven Walker</u>	<u>Pass</u>
<u>Alex Quigley</u>	<u>Pass</u>
<u>Walter Finnigan</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Robert McQuat</u>	
<u>Shannon Sellers</u>	<u>Pass</u>
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Tammi Sutton</u>	<u>Pass</u>
<u>Anthony Helton</u>	
<u>Kebbler Williams</u>	<u>Pass</u>

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

Clearly describe the mission of the proposed charter school:

The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement. Our school will follow the Core Knowledge curriculum, using interdisciplinary lessons and co-teaching best practices to provide enrichment opportunities and differentiation to our students.

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.*

Carolina Charter Academy, A Challenge Foundation Academy (CCA-CFA) will focus on students in Southern Wake County primarily and will also target students in Harnett and Johnston County that are currently not being served well by their existing schools. The School will focus its recruitment efforts on students who will benefit from authentic learning experiences classical learning environment. The character traits of students who will excel at CCA-CFA are students who:

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

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It is expected that the School's population will reflect the racial and ethnic composition of the school system, as described below. The School will attempt to achieve racial and ethnic balance by being open to any student residing within the school districts of Wake County, Harnett County and northern Johnston County. Any student regardless of address, parent's income or academic performance will be encouraged to make application for enrollment to Carolina Charter Academy.

Demographics of Wake County Public Schools

Wake County Public School System is the largest school system in North Carolina and has approximately 153,000 students enrolled in grades K-12 in 169 schools (Source: <http://www.wcpss.net/about-us/ourstudents/demographics/index.html>). These schools include 104 elementary schools, 33 middle schools, 25 high schools, 4 specialty schools, and 3 academies.

It is expected that students who enroll in our School will reflect the demographics of the local school system. For the 2015/16 school year, the student demographics included 51.1% white, 24.4% black, 13.4% Hispanic, .3% American Indian, 6.5% Asian, and .1% Hawaiian/Pacific Islander.

The district has 33.7% students eligible for free or reduced-price lunch and 7.5% classified as LEP.

Rationale for Location and Student Body

Consideration was given to areas of need when determining the location, grades to serve, and enrollment projections. Major factors considered were: total population, school age population, household size, household income, free and reduced lunch qualification, charter competition and performance, and public school performance. All indicators were factored using an initial 10 mile radius from the city center. Carolina Charter Academy chose this location so that it may serve a population that has little to no school choice. As a public school, any child that qualifies for a North Carolina public school education may attend our school. Transportation with drop-off and pick-up points will be provided. These locations will be based upon student enrollment.

The school will be located in Fuquay-Varina, attracting students from several towns with growth: Angier, Fuquay-Varina, Garner, Holly Springs and Willow Springs.

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

The total projected enrollment at the charter school will be 598 students in Kindergarten through 8th Grade. This reflects .55% of the ADM for the same grades of the LEA.

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

Carolina Charter Academy: A Challenge Foundation Academy (CCA-CFA) will work to serve all students regardless of their race, ethnicity, or socio-economic

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background.

CCA-CFA differs from the traditional public schools by offering the Core Knowledge Sequence in grades K-8 and the classical school model of the Trivium. This model of K-12 is offered and supported by TeamCFA. TeamCFA brings the expertise and experience of a network of 15 operating charter schools, ten of which are in North Carolina. In keeping with effective methods of teaching the Core Knowledge Sequence, CCA-CFA will have a strong reading and writing across the curriculum component that will be evident in all subject areas for all grades.

CCA-CFA will utilize Singapore Math, one of the two math programs recommended by the Core Knowledge Foundation. Every student Grade 1 and up will have a technology device. One device will be provided for every two students at the Kindergarten level.

CCA-CFA's partnership with TeamCFA will allow the school to hire the Head of School over one year before the school opens and they will be enrolled in the TeamCFA Leadership Gold program. Other support includes: a \$50K forgivable loan for planning year expenses; a technology grant for student devices and classroom projection systems; \$5,000 in marketing and access to a marketing professional during the planning year and \$2,500 for marketing in subsequent years; technology and website support; and a 1/2 time instructional coach to work with the Head of School and teachers.

In addition, CCA-CFA's basic educational environment will be a mix of classroom and regular, out-of-classroom learning opportunities and community involvement. CCA-CFA sees parents as a strong resource and there will be opportunities for parent training and involvement in academics, school policies, governance, and other school-related issues.

We have a strong commitment to provide our students with a connection to the local environment through science education, to learn about local history through community involvement, and to explore the larger, global world through international aspects of our curriculum such as learning about other cultures and languages. In addition, students, faculty, staff, and administration will develop and practice the core values of Integrity, Respect, Compassion, Responsibility, Wisdom, and Leadership in all aspects of our daily activities.

With a focus on classical education, the board recognizes that learning is most effective when it works with the developmental growth of the student. So, when young children love to memorize (even that which they do not understand), then through the use of rhyme and chant the rules of grammar and math are embedded deeply into the knowledge base of the student. This is called the grammar phase of learning and roughly, though not linearly, equates to the K-5 years of life.

In middle school years (roughly 6-8) the student typically becomes argumentative, disputations, and generally challenging. These are the years that education can more effectively focus on the dialectic, or logic, of a subject. Since the student wants to argue, the student will be taught the rules of logic and the value of thoughtful organized debate.

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Regular formative assessments will be used to ensure mastery of appropriate skills, ideas, and knowledge for all students, regardless of race, gender, or family's socioeconomic and educational backgrounds. Since knowledge and skills are acquired cumulatively and systematically, it will be essential to detect any learning difficulties early and to intervene before proceeding to the next level. Regular formative assessments integrated into the curriculum will help to evaluate how well students are learning and to identify those areas that need more support or greater challenge. A modified program will be provided for those children with diagnosed disabilities which require such assistance.

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. Our curriculum provides much opportunity for collaboration within and between grades and among classroom/core subject teachers and special/elective teachers. Grade level teachers will have common planning times, providing opportunities to exchange ideas, maintain a consistent level of rigor, ensure continuity in the curriculum, and examine data as a group. The use of the Core Knowledge Sequence, with its available training programs and classroom resources, will give teachers a logical, specific, and effective curriculum from which to teach while still having flexibility in planning the delivery of the material. Surveys conducted of teachers at Core Knowledge schools show high levels of satisfaction with the program. Teachers will also have the opportunity to become leaders within the school community. Through our partnership with TeamCFA, instructional coaches will work with the Head of School and provide coaching and co-teaching opportunities with teachers.

2. In addition to the end-of-year state tests, Carolina Charter Academy (CCA-CFA) will give national assessments such as NWEA MAP three times per

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year (fall, winter, spring) to monitor student progress. Scores will be used to monitor growth, and data from the assessments will be used to target areas of need. The administration and teaching staff will hold themselves accountable for the progress and growth of students, regardless of students' backgrounds or situations.

3. CCA-CFA will provide parents and students of all backgrounds access to a classical curriculum which focuses on language skills and builds the background knowledge necessary for comprehension; promotes critical thinking and truth seeking; develops thoughtful, articulate individuals; and trains students to learn for themselves. We will use NWEA MAP assessments and use the data to develop a personalized learning plan for every student. This NWEA MAP data will be used as input for our digital content (plan to use Compass Learning) to target specific learning gaps.

4. Core Knowledge, when implemented with fidelity, has proven to lead to dramatic academic growth for low-performing low-income students. The Core Knowledge Foundation explains that "the Core Knowledge Sequence provides a clear outline of content to be learned grade by grade so that knowledge, language, and skills build cumulatively from year to year". This sequential building of knowledge not only helps ensure that children enter each new grade ready to learn, it also helps prevent the repetitions and gaps that so often characterize current education. Studies from the Core Knowledge Foundation have shown the curriculum's significant advantage in reducing or eliminating the "fourth grade slump", the phenomenon whereby student achievement growth begins to plateau around fourth grade.

5. The use of the Core Knowledge Sequence has been shown to raise the level of achievement for all and to close achievement gaps between disadvantaged and mainstream students. Studies indicate that classical education is related to improved general English comprehension (including reading, vocabulary, grammar and comprehension for both native speakers and English-language learners). At the middle-school level, the study of Latin is related to increased levels of language achievement as demonstrated on both the Scholastic Aptitude Test (SAT) and the American College Test (ACT) verbal scores. Numerous studies have shown that the Core Knowledge Sequence is efficacious in educating proficient learners, including increasing achievement in areas of socio-economic need.

6. Teachers at CCA-CFA will be trained in Socratic questioning to help students develop critical thinking skills and be able to construct their own learning. Teachers will use a variety of instructional methods and practices such as direct instruction, class discussion, technology-led instruction, blended learning.

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.*

First and foremost, Carolina Charter Academy (CCA-CFA) goal is to fulfill its mission. We will work to produce knowledgeable, rational, articulate,

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virtuous adults, and we will strive to close the gaps in achievement between mainstream and under performing students. Students in the southern Wake County area have typically performed below the state level in both reading and math on the state tests and SATs. We believe that the students in our target area can learn and achieve. We will strive for annual growth for all and catch-up growth for those who are behind.

The primary assessment tool for measuring growth and proficiency in our first five years will be NWEA MAP. The test given at the beginning of the first year will provide a baseline both for the percentage of students who are proficient at grade level and for the growth of individual students. We will have a goal each year to increase the percentage of students who are proficient at grade level or higher and to increase the percentage of students who attain adequate growth.

CCA-CFA will focus on eight rigorous goals to ensure that we are fulfilling our mission and providing a high-quality educational foundation to our students.

1. Students will meet or exceed growth a minimum of 4 out of the 5 years.
2. 75% of students will be proficient on state administered math, science and reading tests.
3. Based on NC Accountability Model, the school will be "B" or better by the end of three years.
4. The student attrition rate will be less than 10% each year of the charter.
5. Carolina Charter Academy will build a minimum cash surplus of \$600,000 by June 30, 2023.
6. Carolina Charter Academy will be in compliance with charter, state law, State Board of Education policy and federal law.
7. Carolina Charter Academy will meet enrollment targets set in charter application for the first five years.
8. All board members will participate in 8 hours of board training per year.

The Board of Directors, at any time, may elect to establish additional goals to evaluate the schools progress and successful execution of its mission.

The board will meet once a month except during the month of December and will be apprised of student metrics through reports from the Head of School, as well as annual score reports of all testing. Progress towards these goals will be measured through interim assessment data and student progress tracking software that will be utilized using chromebooks and on-line assessments from Compass Learning, Singapore Math and other blended learning technologies that the board and the Head of School will research.

The board will also work to maintain strong fiscal oversight through an aggressive fund balance goal to ensure sound operational capital is available. The board will also work with TeamCFA to meet all charter law and

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compliance requirements.

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

The Board will use rubrics to measure the effectiveness of school governance, the implementation of sound business practices, and the academic program to ensure continuous improvement and measurable results so students are prepared for a lifetime of learning and are to be great American citizens.

The annual evaluation will include such measures as:

Governance - A majority of the board are non-related parties. Board meetings are conducted regularly and in accordance with Charter, Bylaws, Articles of Incorporation, and State Statutes. The board requires a monthly report from the Head of School. There is an active Parent/Teacher Organization. The board establishes and monitors a multi-year Strategic Plan or Improvement Plan. The board conducts an annual Head of School evaluation concerning accomplishment and progress of the Strategic Plan or Improvement Plan. The board reviews the annual independent audit and responds to any negative findings. The board conducts annual board training.

Business Practice - The board monitors financial transactions through a recognized, regularly audited accounting system. Evidence of sufficient insurance that covers the school and directors is submitted for review. The board monitors the budget to make sure it provides sufficient resources to support the school's core curriculum and mission.

Academic Achievement - The Core Knowledge Foundation will conduct periodic site visits to monitor effective implementation of the curriculum. The board views the report from the Core Knowledge Foundation visit and monitors the school's progress toward becoming an official Core Knowledge site. The board monitors NWEA MAP results to make certain the school is meeting targeted growth and proficiency (TeamCFA's Academic Committee provides annual reports based on NWEA MAP data). The board examines the Professional Development Program to ensure that the school's mission and curriculum are being supported.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
The applicant restates the mission when asked to describe the mission.	Shannon Sellers	Mission Stat
With 27 schools already established and utilizing the core knowledge program in North Carolina how is the mission of CCA bringing change to the charter schools within North Carolina?	Walter Finnigan	Mission Stat
***How would the board describe the mission of the school without using words from the mission statement?	Kebbler Williams	Mission Stat
Explanation of mission is the mission stated again. Explain how students will be prepared to be engaged, active citizens who express good character.	Sherry Reeves	Mission Stat
What evidence do you have that parents want and will enroll their children?	Tammi Sutton	Mission Stat
***The applicant needs to clarify the "character traits of students who will excel at CCA-CFA." If a student does not possess the traits, is the applicant going to encourage him or her not to apply to the school? ***The parent survey does not provide useful information that helps to determine educational need. The applicant needs to clarify how it has determined that there is a need for this school in Fuquay-Varina besides the fact that there are no other charter schools in Fuquay-Varina.	Kebbler Williams	Educational
Please clarify how evidence represents that individual would choose your school if given the option.	Jessica Kelly	Educational
Educational needs are not specific enough.		
How do you know that students will be willing to attend? There is no evidence in the appendices that of the more than 200 surveyed that anyone would be interested in your school.	Jennifer Gnann	Educational
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: http://www.dpi.state.nc.us/charterschools/schools/map .	Deanna Townsend-Smith	Educational
Outside of the financial support from CFA what is the educational need for the school to be located in Fuquay -Varina? The data provided indicated 210 responses to survey that's less than half of the anticipated population of the school. How will the applicant meet the projected enrollment of the charter school if there is no interest in the mission school?	Walter Finnigan	Educational
With a classical education program it is certainly different than the LEA. Also, I believe this will be the only charter school in Fuquay-Varina if approved.	Steven Walker	Educational
Applicant states that targeted population will reflect Wake Co. (51% white, 24% black) but town of Fuquay-Varina is 72% white. Survey had 210 responses. Only 171 of the respondents stated they would have students in the K-6 grade range for 2018-19. Why not ask a question about respondent's likelihood of enrolling student in CCA? The enrollment number and grade span for year 1 is large.	Sherry Reeves	Educational
There is not a clear need for a charter school in this area. Survey results show interest but no direct indication that the child would enroll. The applicant list characteristics for the students they are looking for. What if a student/family doesn't possess these traits, will they be encouraged not to apply?	Shannon Sellers	Educational
***What data does the applicant have to represent all of the studies mentioned in its explanation? ***The applicant may have spread its explanation too thin by trying to address all 6 legislated purposes. Which one or two legislated purposes most align with what the applicant hopes to accomplish if allowed to open this school? Provide specific details regarding how the applicant will achieve those one or two purposes.	Kebbler Williams	Purposes of
Are there benefits to core knowledge for students who are not low income students?	Walter Finnigan	Purposes of
With having the majority of the board as non-related parties will their be investment from the board for the school?	Jessica Kelly	Goals for th

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What is the Core Knowledge Foundation? Why is Team CFA Academic Committee providing the report to the board regarding MAP data?	Sherry Reeves	Goals for th
***The applicant needs to clarify goal #2. Is 75% proficient as high as the applicant thinks the school can achieve? ***How often and by what methods will the board monitor its operations goals? ***How will the board monitor the achievement of the second part of the mission: "...engaged, active citizens and building students of good character through community outreach and development?"	Kebbler Williams	Goals for th
On what assessment is this goal referring? "Students will meet or exceed growth a minimum of 4 out of the 5 years." Is this state testing or MAP? MAP is referenced below in how they will measure the goals, but what about state testing. In addition, what percent of students will meet or exceed growth? This goal is unclear. In what year of the school is this goal referring: "75% of students will be proficient on state administered math, science and reading tests." Will their be improved proficiency over time? What increases are expected?	Tammi Sutton	Goals for th
Reasonable goals.	Steven Walker	Goals for th
Who will provide the board training and when will the board training be given?	Walter Finnigan	Goals for th
75% proficiency seems low for mission stated. There is no specific timeline for this goal to be met. How will the board measure the last part of the mission regarding "character through community outreach and involvement?"	Shannon Sellers	Goals for th
I have concerns about the statement "a majority of the board are non-related parties." A board without conflicts of interest is a board that has NO related parties	Jennifer Gnann	Goals for th

Reviewer	Score
Glenn Allen	
Jessica Kelly	Pass
Jennifer Gnann	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Alex Quigley	Pass
Kebbler Williams	Pass
Walter Finnigan	Pass
Anthony Helton	
Tammi Sutton	Fail
Sherry Reeves	Pass
Shannon Sellers	Pass
Robert McOuat	
Phyllis Gibbs	

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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.

Carolina Charter Academy (CCA-CFA) mirrors the approach of other TeamCFA schools like Thomas Jefferson Classical Academy, which provide students with a foundation of knowledge by instituting the classical model of learning known as the Trivium. The Trivium suggests there are three stages of learning: Grammar, Logic, and Rhetoric. Core Knowledge in grades K-8 provides a base of knowledge (Grammar Stage), and the spiraling nature of the curriculum helps students make connections and begin to question (Logic Stage). As a student's thinking becomes more sophisticated, this base of knowledge allows them to reach the Rhetoric Stage, which is the culmination of the Trivium. In this stage students are able to reason and evaluate ideas in order to pass sound judgments.

In the Grammar stage, teachers will provide a rigorous grounding in the basics of English, history, mathematics, science, art, and music by using the Core Knowledge Sequence developed by E. D. Hirsch, Jr. Teachers will emphasize observation, memorization, and recitation in the early grades. Latin, with an emphasis on grammar, will be taught in grades 6-8 to support language development.

During the Logic Stage, students must explain their answers and support assertions with evidence.

In the Rhetoric Stage, teachers emphasize public speaking, presentations, and a synthesis of the knowledge gained in various disciplines. CCA - CFA students are expected to develop character building skills that allow them to demonstrate their potential. Students learn character development through the school culture and interaction with peers, teachers, administration, and community members.

Out-of-classroom experiential learning.

Parents have stated that they wanted their children to be at a school that regularly participates in community service projects. CCA - CFA will offer out-of-classroom experiences that emphasize experiential learning and community engagement.

Technology Integration.

Many students may enter below grade level or with gaps in learning. To close the achievement gap we deploy a multi-faceted approach that includes a combination of highly trained, high quality teachers using effective and empathetic management techniques to deliver quality curriculum supported

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with the purposeful use of technology. Technology is considered a tool to support our highly qualified teachers in conveying our curriculum. Teachers will have access to a variety of technologies including interactive projectors, document cameras, and student devices. Through our partnership with TeamCFA, students in grades 1-6 will be provided with a technology device and one device will be provided for every two students in Kindergarten. In subsequent years, CCA-CFA will budget for new and replacement devices. During the portion of the day allocated for small group and individualized instruction, these devices will be available to access Individualized Learning Paths, created on the digital content or by the classroom teacher. Each student's Individualized Learning Plan is revised at least three times per year, following formative assessments being administered, to build standards based reading and math skills. Teachers will also have access to <http://www.teamcfaresources.org/>, a website developed by TeamCFAs educational technology staff. This site includes links to over 2,500 free K-12 online lesson resources organized by grade and subject, allowing teachers to create their own lesson plans in a cost-effective manner.

Best practices in teaching are crucial to student success. With the assistance of the TeamCFA educational technology division and instructional coaches, teachers will use data to differentiate teachers whole group instruction and build small groups within their classrooms. This will maximize student growth towards proficiency.

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.

Carolina Charter Academy (CCA-CFA) will be a K-8 classical education school that infuses technology and inquiry-based learning into the learning environment. CCA-CFA will implement a 22:1 student teacher ratio in grades K-2 and a 25:1 student/teacher ratio for grades 3-8. CCA-CFA will use the Core Knowledge Sequence as their curriculum in grades K-8. CCA-CFA will use Singapore Math, one of the two math programs recommended by the Core Knowledge Foundation.

In grades K-5, the basic learning environment is classroom-based. Assuming each grade level has between 50-66 students, there will be three sections per grade in K-2 and two sections in 3-5 initially. The typical class size will be 22-25 students. Each Kindergarten teacher will be supported by a teacher's assistant. First grade will have one shared assistant, as will second grade. CCA-CFA will use an inclusion model for exceptional students, with pull-outs when necessary. In the first year, we will have two licensed EC teachers. English-language learners will receive either contracted or in-house services, depending upon numbers. Students in grades K-5 will receive some direct instruction as a whole class. They will also participate in differentiated small groups as appropriate, and there may be some flexible grouping among classes within a grade.

On a typical school day, morning hours will be devoted to reading, language, and math, with integrated content from the sciences and social studies when meaningful. This is the common approach to the Core Knowledge

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Sequence. Active engagement in learning will be maintained with the rich and rigorous Core Knowledge curriculum and with the use of best instructional practices to make learning interesting and exciting. Social studies and science are taught specifically when not integrated in the morning's reading, language arts, or math. To complement the Core Knowledge Sequence and to provide a strong foundation for the Logic stage of learning, CCA-CFA will use Singapore math in grades K-5. Reading and writing will be applied across all subject areas. Hands-on, interactive learning will be encouraged across all subjects as appropriate. Through a focus on civics and service, students will begin to understand their role as citizens in the school, their community, and society.

Key to our schools instructional model is effective technology integration. Technology is considered a tool to support our highly qualified teachers in conveying our curriculum. Teachers will have access to a variety of technologies including interactive projectors, document cameras, and classroom sets of chromebooks. The classroom set of chromebooks will allow each student to have their own device. During the portion of the day allocated for small group and individualized instruction, these devices will be available to access Individualized Learning Paths, created on the Compass Learning program or by the classroom teacher. Each students Individualized Learning Path is revised 3 times per year, following NWEA assessments, to build standards based reading and math skills. Teachers will also have access to <http://www.teamcfaresources.org/>, a website developed by TeamCFAs educational technology staff. This site includes links to over 2,500 free K-12 online lesson resources organized by grade and subject, allowing teachers to create their own lesson plans in a cost-effective manner.

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.*

The idea of a content-rich curriculum is exemplified by the Core Knowledge Curriculum; it aligns with NC Essential State Standards and will meet or exceed the standards of the North Carolina Accountability Model. Through shared knowledge, the Core Knowledge Foundation espouses the belief that we can build a society that promotes "educational excellence and equity for all children." By doing so, we can produce productive, thoughtful citizens who will contribute to the democratic process, regardless of each citizen's socio-economic background.

TeamCFA partner schools use Core Knowledge for a number of reasons. As at other schools, the board of CCA - CFA believes that a strong phonics component and a focus on learning reading through content are good base skills for a broad range of students. Effective decoding skills coupled with

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broad background knowledge prepares students for more sophisticated critical thinking and reading and writing across the curriculum help to decrease what E.D. Hirsch, Jr. refers to as "the Knowledge Deficit."

Respondents to our survey are in favor of students participating in service/civic projects. Through service to others, CCA - CFA students will practice our core values of Integrity, Respect, Compassion, Responsibility, Wisdom, and Leadership and will learn ethical behavior.

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

Carolina Charter Academy (CCA-CFA) will work to hire and maintain enthusiastic teachers who invest the importance of a content-rich education as the basis of effective, higher-level abstract thinking. Elementary-grade teachers will be trained in best practices related to the Core Knowledge Curriculum, Singapore Math, project-based learning and will receive support from other TeamCFA schools. Using grade teams, they will produce curriculum maps, domain maps, and lesson plans, and they will work collaboratively with other grade teams to ensure a progressive and coherent curriculum.

Teachers will receive training in differentiated instruction to ensure full coverage of children of all needs. The Department of Public Instruction offers a variety of training programs and workshops and CCA-CFA will develop in-house workshops to meet the specific needs of gifted, EC, and ELL students. CCA - CFA hopes to mirror the practices that have proven so effective at schools like Thomas Jefferson Classical Academy. When teachers work to continually improve themselves, they model the types of intellectual behavior we hope to instill in our students.

CCA-CFA will use NWEA MAP testing to track student growth and teachers will work together to use these data to help each child learn and grow. In-house workshops will show teachers best practices for using this data for planning and in the classroom.

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

A well designed curriculum, such as the Core Knowledge and Singapore Math approaches, provide the building blocks for grade-to-grade and school-to-school progression. In fact, one of the major shortcomings of many alternatives approaches is that they treat instructional content as an isolated artifact of the respective course or grade. As a result, when the student moves through the curriculum, they are unable (or have never been taught to) recall what has been learned previously and apply it to the task at hand. But both Core Knowledge and Singapore Math demand that teachers ask students to recall skills and knowledge, in an interdisciplinary and/or cross-disciplinary way, that apply the content that the teacher is conveying to the class.

Of course, one of the difficulties of this approach is that the student may not have been provided a sufficient foundation in earlier grades. The teacher, using tools such as formal and informal assessments, homework, and in-class work, should be able to determine where these deficiencies lie and the appropriate way to address them. In this way, the teacher is engaged in

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two instructional tasks simultaneously - advancing the curricular sequence and discovering instances where that sequence is incomplete for each student in the class. By addressing the latter, the former becomes a more systematic (and ultimately more equitable) process.

Many believe that education is the process of discovery. But the philosophy of this school is that education is the process of rediscovery. There is no idea, concept, or activity that is not connected to some other idea, concept, or activity. Obviously, thinking about education in these terms is nothing new. But that should not diminish its importance. The key is to ensure that teachers, through the process of assessment, instruction, and review, make these connections explicit and meaningful for each student.

Along with CCA-CFA's chosen curriculum, CCA-CFA will will also ensure student readiness for the next grade and eventual graduation by administering MAP testing three times (fall, winter and spring) during the academic year. Student readiness will also be assessed in grades 3 and up with NC End of Grade tests.

In addition to the academic achievement and growth made by students, character education and the development of well-rounded citizens is paramount to success of our students as they transition from grade to grade.

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

The School will determine its own hours of operation and will meet or exceed statutory requirements (GS 115C-84.2). School will begin at 8:00 AM and students will be dismissed at 3:00 PM. The calendar and daily schedule will support the School's mission and education plan by allowing for:

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

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

*the integration of humanities and arts that are part of the Core Knowledge sequence

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

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

CCA-CFA may offer additional instructional time through the use of extended school days, summer school, or classes on weekends based on the needs of the students and their academic performance. These activities will also allow

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for enrichment. We also build in early release days to allow for teachers to evaluate data and plan interdisciplinary lessons. Teacher workdays will provide workshops and training for core knowledge curriculum and data analysis.

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.*

Identification:

Teacher observation

Parental Input

Progress Reports/Report Cards

Previous grades

Peer interaction

Assessment Scores

Intervention:

Through our co-teaching model, the teachers can group students according to ability. The "at risk" student would be placed in a small group and would have the benefit of small group instruction. After school activities such as tutoring/homework helpers will be available after school. Progress reports and report cards will allow teachers to monitor growth.

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.*

Upon registrations to our school, families will be complete a registration form. Parents/guardians will need to designate if student is from a family which does not speak English at home. If necessary, a proficiency test will be administered (ACCESS for ELLs / WIDA Model -- <https://www.wida.us/assessment/MODEL/>). If student is identified as ELL, the student will be placed in the ELL program and parents will be notified. If a student is found to be limited English Proficient, lessons will be designed to ensure that the students needs are being met. Teachers will collaborate with one another and with a specialist, if needed, to create engaging and rigorous lessons. ELL students will be placed in the regular education classroom with their peers. Progress will be monitored by teachers. ELL Students will be re-assessed yearly (or as needed). Using the assessment scores a decision will be made concerning the students placement for the upcoming academic year. If the decision is to exit the student from the program, parents will be notified. The academic progress of students that exit the program will be monitored to ensure they continue their academic progress.

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*

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employ or provide to enhance their abilities.

- b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

Identification

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

Instruction

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

The AIG plan will be reviewed annually with parents to ensure effective programming that meets each student's individual needs.

Monitoring and Evaluation

Monitoring and evaluating the progress and success of AIG students will be the same as for all students. Baseline data will be important for identifying the strengths and needs of our students early in the school year and monitoring their progress over time.

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*

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Accommodation plans will be properly managed.

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

Carolina Charter School(CCA-CFA) honors the laws of North Carolina, which state that public charter schools cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA) Amendments of 2004 (20 U.S.C. 1400 et seq.), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, and North Carolina Policies Governing Services for Children with Disabilities.

The CCA-CFA Administrative Assistant responsible for enrolling students into CCA-CFA will check all incoming records for IEPs or Section 504 plans. CCA-CFA will obtain documentation on IEPs or 504 plans from the students previous schools in order to be in compliance. It will be important to have an initial IEP or 504 meeting involving the EC teacher, classroom teachers, and the parents to determine the adequacy of the plan currently serving the student or determine if plan modifications are necessary. Any student entering CCA - CFA will be given the appropriate services as required by the existing or updated IEP or 504 plan. Teachers, parents and staff will be provided resources for identifying children with special needs in our school through brochures, posters and letters on the NCDPI Child Find website.

The process for identifying students who may be eligible for special education services begins with testing materials, such as the Woodcock Johnson Assessment of Basic Skills and or the use of NWEA MAP testing at the beginning of the school year to determine the ability levels. Students who are struggling with the curriculum will be given additional support both within the classroom and outside of the classroom. Their academic progress will be monitored on an ongoing basis. If there is a need to investigate the students' progress with the curriculum further, the parents will be asked to attend a meeting with the classroom teacher. At this time, the teacher may request that the parents allow the student to be presented to the Student Support Team (SST). If the parents consent, the SST will meet to discuss the student and offer suggestions for interventions. These interventions will be implemented by the teacher and after a minimum of six weeks the teacher will report results of the interventions to the team. At that time, if necessary, the team may discuss the need for testing. The parents always have the right to request their child be evaluated if they feel it is necessary. This request should be made in writing and will be honored. Once the initial DEC1 (Department of Exceptional Children) form is signed, CCA - CFA will ensure that the 90 day timeline required by the state of North Carolina is met.

Once a student is enrolled in CCA - CFA, the administrative assistant will send a written request to the previous school asking for any school records and will include a request for any existing IEP or 504 plans for the student. The Head of School will inform the EC teacher of any students with a previous IEP or 504 Plan in place. The EC teacher will be responsible to contact the previous EC teacher/coordinator to gather more information regarding the student. The EC teacher will keep any records in a locked cabinet or drawer where only those personnel working with the student will have access. A copy of the accommodation sheets and academic goal sheets will be given to the core education teacher and will also be locked to

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prevent access from unauthorized personnel. In order to ensure compliance with all federal and state guidelines, staff will receive professional development training based on serving students in the EC program. This training will include differentiating as necessary for those students, setting appropriate goals, and working as a team to develop an IEP to serve the student best.

The Head of School or their designee will monitor the compliance of 504 accommodation plans with Section 504 of the Rehabilitation Act of 1973.

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.*

Educational Services

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

CCA-CFA shall provide the accommodations and related services on the student's IEP as necessary to permit access to the general curriculum as appropriate for the student. Accommodations shall include, but are not limited to: presentation, response, setting, scheduling, test accommodations, pacing and remediation, and adaptive technologies. Students who do not have success in the general classroom with the above mentioned accommodations will work directly with the EC teacher in individual and small group settings.

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

CCA-CFA will initially employ 2 full-time EC teachers initially and is planning to add a second part-time EC teacher in Year 2 based upon a 10% EC population projection. CCA-CFA will have 3 full-time EC teachers in place to

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serve the school's projected 10% EC population enrollment over approximately 59 students at maximum capacity.

Support for FAPE

CCA-CFA will have a non-discriminatory policy of enrollment that provides a free and appropriate public education (FAPE), and adheres to the IEP developed for each student. In accordance with federal and state anti-discrimination laws, CCA-CFA will not discriminate on the basis of any legally protected category in the admission of students. The School has designed an enrollment process that will ensure that students with disabilities will have an equal opportunity of being selected for enrollment in the School.

IEPs

An IEP will be developed for each student eligible to receive Exceptional Children (EC) services that will consider the parents' concerns, and student's strengths, evaluation results, and academic, developmental, and functional needs. Language needs of ELL students with disabilities will also be considered. The EC teachers will be responsible for (a) ensuring that IEPs are provided to each general education teacher serving a student with disabilities and (b) monitoring IEP implementation. The progress of students with disabilities will be reported to their parents at least as often as progress of non-disabled students is reported to parents. IEPs will be reviewed, at a minimum, annually to determine progress and achievement of the student's goals. IEPs will be revised to address any lack of progress, recent evaluation results, additional information about the student, and anticipated needs.

Related Services

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

Student Performance Standards

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

Our goal is to be a "B" or better school where students meet or exceed growth and are at or above grade level, and we expect our students to exceed the growth and proficiency levels of both the district and the state. We will have high academic expectations for all students. We will expect effort and improvement from all students, and will provide them with necessary support to achieve this.

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Carolina Charter Academy (CCA-CFA) will administer the NWEA MAP three times per year to track student growth in grades K-8. The nationally normed MAP provides RIT (scale) score growth targets in math, ELA, and science. Each fall, NWEA provides students with a nationally normed spring RIT target representing the average fall to spring growth of students nationwide at their grade and RIT level, thus ensuring that each student has a growth target unique to his/her academic needs. Each grade-level will meet or exceed 100% of spring RIT growth targets in math, ELA, and science annually. All students with fall and spring scores will be included in NWEA's grade-level calculations of "Overall Percent of Projected RIT Met or Exceeded."

CCA-CFA will have a dual focus on proficiency and growth aligns to the state's accountability expectations.

CCA-CFA will adhere to all state accountability and testing requirements, including administration of state math, reading, and science assessments, currently the READY EOG and EOC Assessments. CCA-CFA will also administer any alternative assessments as appropriate. Third grade students who do not pass

the 3rd grade reading EOG, and do not meet any of the good cause exemptions outlined by the state will take the Read to Achieve test. CCA-CFA will administer assessments that mirror the state-mandated assessments in order to ensure adequate progress and preparation for every student.

Data derived will be used to group students and will also be used to determine what resources students are provided. Grade-level teams will also develop Common Assessments in reading, mathematics, and all content areas based on the Common Core national standards as well as North Carolina Essential Standards, which will serve as post-assessments to gauge student progress and will also be used to regroup students for additional re-teaching and/or remediation.

Students will be promoted or retained based upon the following criteria:

- Limited English Proficient students with fewer than two years of ESL instruction will be promoted to the subsequent grade unless a strong case can be made demonstrating what benefits could be derived from their retention.
- Students with disabilities, as identified by Individualized Education Plans (IEPs) will be given alternative assessments.
- Students who have been previously retained will be exempt from being retained more than once in grades kindergarten through 3rd.
- Students in grades kindergarten through 2nd or 4th grade scoring substandard on their end-of-the-year summative evaluation or State-approved standardized test in reading comprehension and who do not fit into one of the categories described above will be referred to Carolina Charter Academy retention/promotion committee for further evaluation.

In accordance with state law, students in 3rd grade will be retained if they fail to demonstrate reading proficiency on the State-approved standardized test of reading comprehension. Students may be exempt from mandatory third grade retention if they meet any of the following good cause exemptions:

- Limited English Proficient.
LEP students with fewer than two years of ESL instruction will be promoted

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to the subsequent grade unless a strong case can be made demonstrating what benefits could be derived from their retention.

- Students with disabilities (IEPs) will be given alternative assessments.
- Students who demonstrate 3rd grade reading proficiency on alternative assessment of reading comprehension OR have received reading intervention.

These students may be exempt from mandatory retention in 3rd grade for good cause but shall continue to receive instructional supports and services and reading interventions appropriate for their age and reading level.

- Students who demonstrate third grade reading proficiency through a student reading portfolio.

CCA-CFA shall keep parents and guardians aware of the reading progress of their child, of all school-based interventions, and of what efforts they can be making at home to aid in their child's literacy progression. As policy, the staff and faculty of Carolina Charter Academy will not wait until a child is at-risk for retention to inform parents of below-grade-level performance.

In accordance with state law, students will be granted due process rights, including the opportunity for a hearing before the board. Before students with disabilities can be suspended for more than ten school days in a school year or expelled, a manifestation determination meeting must be held by the IEP team to decide if the student's disability caused the offense. The outcome may impact further disciplinary action taken related to the student to ensure the student will not be denied access to education provided by federal law.

Policies and procedures disseminating due process rights including grievance procedures for when a student is expelled will be provided in the student handbook.

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.*

Carolina Charter Academy (CCA-CFA) will hold all stakeholders accountable for sharing responsibility with teachers to create a peaceful learning environment that promotes and optimizes academic achievement. Stakeholders include CCA-CFA employees, students, students' families, and the community. Students will be taught how to make positive, productive decisions that promote scholarly learning and a civil environment. Other areas such as:

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school uniform policy, parent drop-off and pick-up procedures, and grading policy will have high standards in order to promote a strong "ownership of learning" environment for all stakeholders.

A higher standard of dress encourages greater respect for individuals, students and others, and results in a higher standard of behavior. As a result, the students will be expected to wear school uniforms and follow the dress code as set forth in our student handbook.

We will develop a sound Student Code of Conduct and Ethics in which there are 3 levels of disciplinary action. The levels are determined by the seriousness of the act. Level One represents student behaviors that only impact their own personal learning. When a child's behavior is distracting enough that it impacts another students learning the behavior then represents a Level Two offense. The disciplinary actions are stronger when a child's behavior is taking away from another child's education. When a child's behavior distracts the entire classroom setting or the total school setting, the offense is a Level Three offense. When a child repeats an offense of the same nature, the action/discipline will be taken at the next highest level. The object of a disciplinary action is to teach the child to not repeat the same action. If a lower level consequence has not stopped the behavior, the next incident will require a higher level action/consequence from teacher/administrator.

Level I Actions- Student behavior only impacts his/her own personal learning. In order to resolve Level I discipline problems, the following options are available:

- * Conference with teacher
- * Parent Contact
- * Conference with teacher and parent(s)
- * Conference with Head of School or designee
- * Conference with counselor
- * Time Out
- * Behavioral Chart
- * Detention (Teacher or Administrative)

Level II Actions- Student behavior impacts the education of another student. In order to resolve a Level II offense, more formal disciplinary actions shall be used. Formal actions include, but are not limited to:

- * Detention (After school teacher or school administrative)
- * In-school suspension
- * Conference with Head of School or designee
- * Out-of-school suspension, if repeated offense

Level III Actions- Student behavior seriously disrupts the teaching environment of a classroom or a school setting, or puts child/children in danger/safety risk. In order to resolve Level III offenses, the options available are:

- * Out of school suspension
- * Long-term suspension
- * Administrative review and reassignment
- * Documentation of these offenses will be placed in the students permanent record/file.

Student will face long-term suspension/expulsion if:

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* Student is in possession of any gun, rifle, pistol, BB gun, or other firearm of any kind.

* Student sells or delivers any prohibited substance at school.

* Student assaults a school employee.

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Section III: Education Plan Concerns and Additional Questions		
What evidence do you have that this approach works for all children - especially those who are at risk?	Tammi Sutton	Instructiona
Clarification is needed on the approach the application hopes to mirror from Thomas Jefferson Classical.	Shannon Sellers	Instructiona
***What is the documented evidence that the proposed approach will lead to improved student performance for the school's target population?	Kebbler Williams	Instructiona
I am a strong believer in the strength of the classical education program and I am also a strong believer in the use of personal electronic devices to aid in learning (one-to-one devices).	Steven Walker	Instructiona
How many calendar days/instructional hours for the AY?	Sherry Reeves	Curriculum a
What will grades 6-8 look like as far class size, learning environment, etc? There is not a lot of time set aside for professional development for teachers as mentioned in the narrative.	Shannon Sellers	Curriculum a
***What is the basic learning environment planned for students in grades 6-8? ***What are the primary instructional strategies used at Thomas Jefferson Classical Academy that the applicant is hoping to mirror? What strategies have been successful in the elementary grades? What strategies have been successful in the middle school grades? ***The demographics of Thomas Jefferson Classical Academy (TJCA) do not match the proposed demographics of the applicant's school. Further, in 2015-16, only 39.6% of African American students and 53.5% of Hispanic students were proficient on the EOG tests at the College and Career Level at TJCA , while 80.5% of White students were. In this regard, what evidence can the applicant provide that this model works for ALL kids? ***The school calendar does not observe the Veteran's Day holiday on November 12, 2018.	Kebbler Williams	Curriculum a
More evidence needed to show how this model will support students who are behind in grade level.	Tammi Sutton	Curriculum a
How was it decided that Core Knowledge and Singapore Math would be the two main curriculum's for your school? Who was involved in this decision making process. The calendar does not support teacher professional development. Only 4 days are indicated during the school year for teacher workday's and these are on early release days. Please clarify how the teacher workday's and professional development are going to be acquired.	Jessica Kelly	Curriculum a
I'm concerned with the lack of planning days for the teachers. Looking at the calendar, 4 half days throughout the year isn't much.	Jennifer Gnann	Curriculum a
The applicant does not state whether it will operate by number of school days per year or hours. The curriculum framework in appendix B does not clearly support the mission of the school as it is not aligned with the North Carolina accountability model. Appendix B is just a basic course listing. Does not outline the curriculum for one year.	Walter Finnigan	Curriculum a
Scope and Sequence is not very detailed.	Alex Quigley	Curriculum a
What process will be used to identify at risk students? Will the school be following RTI/MTSS model of intervention?	Jessica Kelly	Special Prog
What resources will be provided to the student and parent of an ELL student? Explain further your intervention plan. How will students that are at-risk be identified, how will they be supported? What plan is in place for them. There is no mention of the Home Language Survey. Why aren't the parents involved in the ELL process? "Parents are notified"? Explain more about the ELL program How will you ensure that students are receiving the proper AIG instruction if it is supposed to be "integrated"? Is there an AIG teacher?	Jennifer Gnann	Special Prog

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<p>***What methods and systems of prevention will teachers use to provide assistance to students that are not performing at expected levels?</p> <p>***How will small group instruction be organized in a way to ensure continued progress and academic student growth?</p> <p>***If an ELL student requires intensive services beyond what a classroom teacher can provide, how will the applicant meet the student's needs?</p> <p>***What are the 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?</p>	Kebbler Williams	Special Prog
<p>The applicant needs to clearly define an ELL program.</p> <p>The applicant states they will be identifying academically gifted students therefore they must submit an academically gifted program to the Department of Public instruction.</p>	Walter Finnigan	Special Prog
<p>This section lacks specific details of intervention. How will this approach bring students who are years behind to grade level:</p> <p>Intervention: Through our co-teaching model, the teachers can group students according to ability. The "at risk" student would be placed in a small group and would have the benefit of small group instruction. After school activities such as tutoring/homework helpers will be available after school. Progress reports and report cards will allow teachers to monitor growth.</p> <p>More details are needed for the ELL plan.</p>	Tammi Sutton	Special Prog
<p>The explanation for identifying and providing interventions to at-risk students is vague. Applicant also seems to lack understanding of the Exceptional Children's program, as well as EL program.</p> <p>Concerning that applicant states that AIG monitoring and evaluating will be the same as for all students. Even though classical curriculum works well with this population, how will identified students be served to meet their needs as written in their personalized education plans?</p>	Sherry Reeves	Special Prog
<p>How will "At-Risk" students be identified? Will you be using RTI? Who will be leading the small groups for "at-risk" students? What if these groups don't help the student? The plan for "At Risk" students is vague and should be expanded.</p> <p>There is no mention of the Home Language Survey to help identify ELL students. The applicant should review the regulations and testing around ELL students. There is a test that is administered yearly to ELL students to determine services and eligibility that is not mentioned. What will you do with ELL students that need extra support outside of the regular ed classroom?</p>	Shannon Sellers	Special Prog
<p>What is your process for Child Find? This would include teacher and parent referral. The process is not started with testing. It appears that the identification and referral process is out of sequence. Please note: The 90 day timeline begins once a referral is received not the date of the DEC 1 meeting.</p>	Glenn Allen	Exceptional
<p>Will an EC teacher/director be involved in the process of acquiring 504s and IEPs?</p> <p>Why is your head of school monitoring 504s? Will this also be the person who is monitoring mods are being met? Will this person also be conducting all 504 meetings?</p>	Jessica Kelly	Exceptional
<p>504 plans are different from exceptional children and typically do not fall under the exceptional teacher's responsibility as mentioned in the application.</p> <p>Placing posters and Brochures around the school is not sufficient for child find.</p> <p>Applicant should review its referral plan to ensure it is meeting the 90 day time line that begins at request not DEC 1 meeting.</p>	Shannon Sellers	Exceptional
<p>The applicant needs to contact the school in which the child is transferred from to make a records request , specifically asking if the student has a 504/ELL or EC services</p>	Walter Finnigan	Exceptional
<p>I'm concerned that an Administrative Assistant, who typically do not have a background in education, will be responsible for "checking records for IEPs or 504s". How will the principal and the EC staff ensure that this is done with fidelity and that every student is properly served?</p> <p>Putting up posters about ChildFind isn't enough to identify children with disabilities. How will the school be using ChildFind?</p>	Jennifer Gnann	Exceptional

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<p>What interventions will be in place if the parent does not give consent for the child to be presented to the SST? How will the child's needs be met even if they are not entered into the EC program?</p> <p>Who will be conducting the evaluations?</p> <p>Explain your 504 process further. I'm concerned about the principal monitoring those plans. Who is responsible for writing them and putting those plans in place?</p>		
<p>What if a student comes in with an IEP requiring self-contained classrooms?</p>	Shannon Sellers	Exceptional
<p>***To what degree has the applicant planned for the need of a self-contained classroom?</p>	Kebbler Williams	Exceptional
<p>More details are needed to explain how 504 plans will be created.</p>	Tammi Sutton	Exceptional
<p>Explain further the educational program, strategies, and the supports available to students in the EC program.</p>	Jennifer Gnann	Exceptional
<p>The process for identifying and testing EC students needs to be clarified. There is not enough information about the intervention process that will occur prior to testing for EC.</p>	Jessica Kelly	Exceptional
<p>Promotion standards are not clear.</p>	Sherry Reeves	Student Perf
<p>It is concerning that the narrative states all students with disabilities will take alternate assessments. It should be based on individual student need.</p>	Glenn Allen	Student Perf
<p>How will the school assure that as students exit they are fully prepared for high school?</p> <p>Is there any type of committee for promotion/retention or is it based on criteria alone? Who will be making the final decision about retention?</p>	Jessica Kelly	Student Perf
<p>100% meeting RIT growth annually. Does that include your special populations? explain the statement "provide them with the necessary support to achieve this."</p> <p>Who is on the retention/promotion committee? Do they have the final say in the retention/promotion of students?</p> <p>What are the exit standards for 8th graders?</p> <p>How does assessment drive instruction?</p>	Jennifer Gnann	Student Perf
<p>***What are the school's exit standards for 8th grade students? What should these students know and be able to do by the time they are exiting the school? Are the exit standards for at-risk students the same or different as for non-at-risk students?</p>	Kebbler Williams	Student Perf
<p>Goals are not time specific.</p> <p>Not all students requiring an IEP will require alternative assessments as stated in your application.- "Students with disabilities, as identified by Individualized Education Plans (IEPs) will be given alternative assessments."</p> <p>Promotion/retention policy needs clarification. Are promotion and retention based solely on test scores? What about classroom performance?</p> <p>Who is on the committee?</p> <p>What exit standards are there for 8th graders?</p> <p>How will test scores drive instruction to improve over-all student performance?</p>	Shannon Sellers	Student Perf
<p>There is nothing mentioned regarding discipline of students with disabilities. Refer to "Policies Governing Services for Children with Disabilities" when developing your plan.</p>	Glenn Allen	Student Cond
<p>Suspension information for EC students was given in previous section.</p>	Sherry Reeves	Student Cond
<p>No information about student conduct for students with disabilities.</p> <p>Who will determine what level of discipline a student is on?</p> <p>Is there a process in place for a student who has multiple offenses throughout the year? If so this process is not clear. A grievance process is not indicated either.</p>	Jessica Kelly	Student Cond
<p>Need more information that board understands due process rights of students for long-term suspensions/expulsions.</p>	Steven Walker	Student Cond
<p>Explain "time out".</p> <p>A discussion of students with special needs is missing from this section. I believe it was placed in the previous section by error.</p>	Jennifer Gnann	Student Cond

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How will teachers and families be made aware of these policies? How will you ensure that each teacher institutes these policies in the same manner?		
***What is the applicant's definition of "administrative review and reassignment?" ***How will the school take into account the rights of students with disabilities in regards to actions that may lead to suspension or expulsion? ***What are students' due process rights when suspended or expelled?	Kebbler Williams	Student Cond
There is no mention of due process for students when discussion of suspension. How will discipline for students with disabilities be handled? Who determines what level a student is on regarding discipline?	Shannon Sellers	Student Cond

Reviewer	Score
Alex Quigley	Pass
Steven Walker	Pass
Deanna Townsend-Smith	
Jennifer Gnann	Fail
Jessica Kelly	Pass
Glenn Allen	
Walter Finnigan	Pass
Tammi Sutton	Fail
Sherry Reeves	Pass
Shannon Sellers	Fail
Robert McOuat	
Phyllis Gibbs	
Kebbler Williams	Pass
Anthony Helton	

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IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Nathaniel Macon Academy, Inc.

Mailing Address: 2507 Belvinwood Drive

City/State/Zip: Fuquay Varina NC 27526

Street Address: 2507 Belvinwood Drive

Phone: 919-610-8725

Fax:

Name of registered agent and address: Jaime Stoops
2507 Belvinwood Drive
Fuquay-Varina, NC 27526

FEDERAL TAX ID:

Tax-Exempt Status 501 (c)(3)

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

Yes (copy of letter from federal government attached: Appendix 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.

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

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Jaime Stoops	Chairman	WAKE	Teacher		
Terry Stoops	Board Member	WAKE	Director of Research and Education Studies		
Stephanie Nall	Secretary	WAKE	Public School Teacher		
Daniel McChensley	Treasurer	WAKE	Accountant, Learning Express		
Kellie Nothstine	Vice-Chairman	JOHNSTON	Title IX Coordinator, Campbell University		

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.*

Nathaniel Macon Academy, Inc. is a North Carolina not-for-profit entity organized exclusively for educational purposes and will hold the charter for the Carolina Charter Academy - A Challenge Foundation Academy (CCA-CFA). The Board shall be responsible for developing and outlining the mission, vision, and values of the School and developing the appropriate policies to ensure those fundamentals are maintained. The Board shall be responsible for the legal and financial obligations of the School.

The Board ensures that CCA-CFA programs and operations are faithful to the terms of the charter including compliance with statutory and regulatory requirements. The Board will continue to uphold the mission and vision of the School through visible leadership and stewardship of CCA-CFA, including the following:

- * Communicating the mission and vision of the School to the community
- * Responsibility for achieving the mission and vision of the School
- * Participating in fund raising and other community events on behalf of CCA-CFA
- * Setting, Approving and Monitoring the School Budget
- * Reviewing and approving the Monthly Financials making adjustments as needed
- * Reviewing School Performance
- * Monitoring the Overall health and viability of the school
- * Communicating with the Community and State Board of Education
- * Monitoring Progress Toward Goals
- * Strategic and Operational Oversight of the Head of School
- * Hiring of Teachers
- * Strategic Planning
- * Ensuring compliance with all Local, State and Federal reporting

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requirements.

The Board will work with Team CFA to identify a school leader (principal) who will be trained in school leadership from TeamCFA staff, other TeamCFA school directors, and the Core Knowledge Foundation.

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

Carolina Charter Academy's (CCA-CFA) board will consist of no fewer than 5 and no more than 7 members who accurately reflect the demographics of the communities the school serves. The members of the board offer a broad cross-section of skills that are necessary to the success of the school. These areas of expertise include public school education, federal programs expertise, fundraising, local business, finance, and research (policy)(representing the realms of private, home school, traditional public middle and high school, post-secondary institutions, and instructional technology). In addition, several of the founding board members will be parents of CCA - CFA students.

The board is responsible for hiring a Head of School to serve as the executive of day-to-day operations of the school and to serve as the chief educational overseer. The local board has partnered with TeamCFA and will work with them to identify a strong leader - one who preferably has worked within TeamCFA schools in the past.

The school's success depends upon effective relationships between and among board members and with the Head of School. The board, at minimum, will offer a formal, annual evaluation of the director, but ideally, there will be ongoing and regular feedback between the board and director. Like all effective critiques, these evaluations are designed to help the director improve weaknesses and avoid mistakes evaluations are tools for construction, not destruction. CCA - CFA is developing evaluation metrics for the board's self-evaluation and for the evaluation of the Head of School.

The board will set clear academic goals based upon student performance and growth as determined by NWEA MAP Testing or a similar placement metric and competence on North Carolina state testing measures and other national assessments.

Fiscal goals and planning will be part of the budget process each year. The Finance Committee in particular and the board in general will offer close oversight and regulation on fiscal matters. The board will receive monthly updates from representatives from our contracted financial services provider who will assist in the supervision and monitoring of the budget.

Other important indicators of school success are enrollment demand and student retention. The board will monitor these indicators and the school will conduct regular parent surveys to determine why they have chosen CCA - CFA and exit interviews to maintain awareness of why students leave.

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In addition, the board will carefully track parent satisfaction and staff retention and performance through surveys in an effort to constantly improve the learning environment of the school.

- 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 was initially composed of parents of school-aged children who came together to investigate school choice options and to look at alternatives to class size issues and overcrowding in Wake County. The members of this group identified their strengths in the following areas: traditional public education, homeschooling principles, research and professional writing, federal programs and business development. Currently the board will be seeking an attorney to serve on the board, also the board does wish to develop a strong fundraising program once the charter is granted and may seek a candidate at that time to assist the school and engage the community through fundraising. If CCA - CFA receives its charter, we will add a TeamCFA board representative.

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

Monthly meetings, except December. Annual meeting - May. Board retreat - July.

- 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.*

Carolina Charter Academy (CCA-CFA) will adopt a board handbook from a sister TeamCFA school. This handbook will serve as a primer for all board members. In addition, TeamCFA offers a suite of free support services through its operating committees and its system of schools. Each TeamCFA representative receives training in NC open meeting laws; charter school governance best practices; good fiscal oversight; strategic planning; and TeamCFA Academic, Governance, and Business Committee practices. The representative, in turn, imparts these skills and knowledge to the local board members. TeamCFA's established schools actively reach out to fledgling schools like ours to offer assistance. TeamCFA also offers board training at its annual conference in June and the governance committee is developing a board training program which will be instituted throughout the network of schools. TeamCFA also sponsors board dinners and staff/board luncheons for the purpose of furthering the "community" culture of the TeamCFA Network.

The board will participate in all required training offered by the Office of Charter Schools for board development.

- 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.*

Board members must sign a Conflict of Interest Statement disclosing or disclaiming any conflict (see Appendix G). If board members find themselves in a conflict of interest, they shall: 1. disclose the conflict, and 2. recuse themselves from any votes and will refrain from any discussion of the matter. Article IX of the bylaws addresses conflict of interest and the board's policy.

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

Policy development will occur primarily at the committee level, but direction may originate with the full board. Final policy decisions rest solely with the board, and all policies will be voted upon in board meetings. However, the board will consider input from stakeholder groups as needed, including the school director, faculty, students, parents, administration, community members, and TeamCFA. As CCA - CFA grows, there may be a need to add permanent or ad hoc committees. The board shall add a fundraising committee and a grievance committee once the school has earned its charter.

Current standing committees are:

Marketing
Finance
Facilities
Curriculum
Governance

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.

Teacher Advisory Committee

During the first year of the school's operation, the Head of School will institute a teacher advisory committee to provide another means of feedback. It will consist of no more than five faculty members chosen by anonymous vote of the faculty. The faculty shall invite no more than two parents to participate as members. The Head of School and a board member may participate with the committee, but will not lead it.

The committee does not have executive authority, but such a group will help to maintain open lines of communication between parents, faculty, board members and the school director and will promote healthy, productive discourse.

The Teacher Advisory Committee will take a broad view of the schools needs, but its areas of focus shall be:

- a. School Improvement: listening to colleagues' suggestions, seeking ways to make CCA - CFA better
- b. Improving Communication: upward to the school director, committees, and board; and outward to staff and parents
- c. Daily Operations: offering advice and troubleshooting topics that deal with day to day operation and do not require board approval (e.g., policies related to carpool procedures, class changes, computer lab rules, etc.)

Parent Action Committee

CCA - CFA will have strong ties with parents. Traditionally, a Parent Action Committee (PAC) has a strong parent focus. We will seek to create a PTO that engages parents

and teachers in the process of school support and improvement. Teacher representatives will report to the faculty and staff of CCA - CFA and parents in the PAC will reach out to other parents to encourage involvement.

The board hopes to focus the efforts of some of the parents currently involved with the founding of the school to facilitate the development of CCA - CFA's Parent Action Committee.

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

CCA - CFA will have a dispute resolution policy approved by the Board to

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address grievances between the School and parents, students, or others.

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

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

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

4. If no appeal is received by the Board Chairman within 5 days, the Head of School's decision is final.

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

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils).
(Appendix 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.

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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.

Carolina Charter Academy(CCA-CFA) seeks to staff our school at an optimal level in order to ensure a good student-teacher ratio as well as to ensure all administrative and financial responsibilities are handled effectively. CCA-CFA will employ 16 core teachers, 2 Exceptional Children's teachers, 3 elective teachers (PE, Music, Art), 6 teaching assistants, a full-time Head of School and assistant administrator, 1.5 administrative assistants (one who will have some on-site financial duties), a full-time custodian and maintenance position, and one part-time bus driver.

As the school grows, we plan to increase faculty positions in the core areas. The hiring of an additional full-time administrative assistant will be necessary to fulfill additional student accounting needs. Additional bus driving responsibilities will be given to teacher assistants who have CDL licensure as the need arises.

CCA-CFA may also contract for some functions such as food service and accounting and financial services

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

(1) Recruitment

Once a Head of School is hired; he/she will begin the process of recruiting, interviewing, and recommend hiring teachers that share our educational vision to staff the School. As with any school, high quality, effective education begins with these teachers. The majority of the staff will come from within the local community. As necessary, CCA-CFA will use all traditional means of recruitment including newspaper, Teachers-Teachers, TopSchool Jobs, the NC Charter School Association, Indeed.com, and professional recruiters.

(2) Retention

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

CCA-CFA is committed to providing a comprehensive benefits program for all eligible employees. In addition to receiving an equitable salary and having an equal opportunity for professional development and advancement, employees may be eligible for other benefits that will enhance their job satisfaction. A good benefits program will be a solid investment in employees. The Head of School and Board will periodically review the benefits program, as described below, and make modifications as appropriate. The Board reserves the right to modify the benefits offered. Teachers will be offered a competitive benefits package. The school does not plan to participate in the State Health Plan or the State Retirement System. The school will offer a defined

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retirement contribution plan that is more flexible and portable for teachers. The plan will provide for an employer match.

Teachers will have a voice in School leadership through staff meetings, regularly scheduled committee meetings, and the School Advisory Council.

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

All employees will be employees of the Board. The Board will enter into an agreement with TeamCFA to help identify and train the school leader (Head of School). Once the Head of School is hired, he/she will interview and recommend staff for hiring approval by the Board. The Head of School will be responsible for daily operations at the School and will serve as the educational leader, and supervise and evaluate staff employed at the School site.

Team CFA will appoint one board member to serve on the Board of Directors as a voting member.

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

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

We believe that the majority of the staff will come from within the local community. As necessary, Carolina Charter Academy (CCA-CFA) will use all traditional means of recruitment including newspaper, Teachers-Teachers, TopSchool Jobs, the NC Charter School Association, Indeed.com, and professional recruiters.

All employment will be in accordance with the laws of the United States and the State of North Carolina, which guarantee equal employment opportunity for all persons, regardless of race, gender, age, religion, national origin, or disability, and provide equal treatment opportunity in all aspects of employment including working conditions, pay, benefits, and advancement.

Employment at CCA-CFA will be at-will. The Head of School will be responsible for the logistics of hiring and dismissal, but in the first year members of the board will be involved in the interviewing process.

Carolina will obtain a criminal record history check on all new employees from the State Bureau of Investigation or from other qualified sources. Any misrepresentations, falsifications, or material omissions in any information or data in an application may result in the exclusion of an applicant from consideration for employment by CCA-CFA or, if the person has been hired, termination of employment.

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

Carolina Charter Academy - CFA will use the state salary ranges as a general guideline, but intends to start all teachers at an average salary of \$42,000/year as well as provide incentive pay based on student achievement and effective teaching practices. In terms of benefits, the school will provide worker's

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compensation. We will provide health benefits and a retirement benefits option for all full-time employees. The board does not intend on participating in the NC State Employee and Teacher's Retirement System but will make a final determination upon receiving charter.

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

(1) Grievance

CCA-CFA will have a dispute resolution policy to address grievances between the School and parents, students, staff, or others. The policy will include:

1. Visit with the appropriate school employee to discuss the concern in an effort to seek a satisfactory resolution.

2. If a satisfactory resolution cannot be reached, the individual can seek resolution through the Head of School.

3. If the concern cannot be resolved satisfactorily with the Head of School, the individual may appeal to the Board of Directors. Any appeals to the Board will be sent to the Board Chair in writing within 5 days of meeting with the Head of School. The decision of the Board is final, provided that the concern does not involve matters related to an individual's protected liberty or property rights.

4. If no appeal is received by the Board Chair within 5 days, the Head of School's decision is final.

(2) Termination

Employment with the School will be at will. Employment contracts will be issued for the purpose of specifying salary, position title, and duties.

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

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

Almost every charter school employee has multiple responsibilities within the organization. Faculty and staff may be licensed to drive buses. Teachers may be department chairs, grade team leaders, coaches, or mentors.

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 10% of the total student population, the initial (year one) special education staff will include 2 EC teachers and 1 EC assistant. EC staffing will fluctuate up or down as exceptional child enrollment and IEP requirements dictate.

In recruiting faculty our school will include at least one certified teacher with ESL/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

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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).*

Carolina Charter Academy - CFA intends to hire highly effective teachers who are grounded in their discipline, experts in their content area, and love teaching. We will comply with NC law regarding licensure of teachers in charter schools as well as with applicable NCLB Highly Qualified requirements. All personnel must demonstrate a commitment to our mission and educational model.

The school will employ the following positions the first year, but as the school expands, so will its staffing needs. The director and board will address these needs as they arise.

Head of School:

The Head of School is responsible and accountable for all aspects of the school's daily operation. Specific responsibilities include, but are not limited to: board reports, budget planning, instructional leadership, evaluating the teaching staff, discipline, conflict resolution, and community outreach. TeamCFA will assist the board in recruiting the Head of School with management and leadership experience.

Assistant Administrator:

The Assistant Administrator(AA) will have earned a Master's degree or have equivalent education and experience. The AA supports the Head of School and serves as Acting Director in his/her absence. The AD is responsible for the oversight of all teaching faculty, curriculum design and improvement, coordination of classroom activities with internship activities, teacher professional development, and teacher assignment in close cooperation with the Head of School. The Assistant Administrator may serve as the test coordinator.

Administrative Assistant:

Responsibilities include answering the phone, greeting visitors, maintaining attendance/late arrival/early departure records, student information management, and general office duties. The administrative assistant will maintain school business and human resources records including teacher licensure records, accurately maintain financial records, and keep abreast of policies and regulations. Associate's or bachelor's degree or appropriate experience preferred. General computer skills and knowledge of Excel and other office/business programs. Strong organizational skills. Demonstrated dependability. Clerical or customer service experience a plus. Administrative assistants will perform finance, human resources and data manager functions

K-8 teachers:

Will be responsible to implement the Core Knowledge Curriculum for their grades and teach students to master the skills. Grade teams will plan together, and specialty teachers will collaborate with grade teams. Teachers must work with EC staff to ensure compliance in services and accommodations. The school will comply with state law regarding licensure of teachers in

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charter schools as well as applicable federal law. It is recommended that teachers have a clear understanding of classical education.

Teacher assistants:

Assist teachers with instructional duties. Two year degree or equivalent education and experience.

EC teachers:

The EC teachers will oversee services for Exceptional Children, work with regular education teachers, and provide training in EC practices. Must be licensed or eligible for licensure in Exceptional Children. An EC teacher may serve as the EC Director for the school.

Staff Evaluation and Professional Development

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

The Assistant Administrator, 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.*

(1) Mentoring

Mentor teachers will be assigned to any teacher who is in the first 3 years of teaching and holds a Standard Professional 1 License. Mentors will be selected who have evidence of success with our student population within the School's model. Mentors will be expected to provide logistical and emotional support, focus efforts on improving instruction and learning, and provide ongoing support and encouragement to their beginning teacher. Time will be scheduled for mentors to observe their beginning teacher in the classroom, and for mentors and their beginning teacher to meet regularly. Model Classrooms will be identified within the School to allow the scheduling of observations and discussions between new teachers and their assigned Mentor Teacher.

(2) Retention

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

(3) Evaluation

One of the most effective forms of professional development will be provided by the TeamCFA instructional coach. The 1/2 time instructional coach will work with the Head of School and with coach teachers and co-teach in the classroom. Teacher evaluation will align with the North Carolina Educator Evaluation System (NCEES). The intended purposes of the School's evaluation process is to assess the teacher's performance in relation to the North Carolina Professional Teaching Standards, and the School's mission and goals, and to design a plan for professional growth.

Teachers will be evaluated on their abilities to meet the following

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standards:

- *Demonstrating Leadership
- *Establishing a Respectful Environment for Diverse Student Populations
- *Knowledge of Content
- *Facilitating Learning
- *Reflecting on Practice
- *Contributing to Student Academic Success

Evaluation will include the following process:

- *Training/Orientation on the evaluation purposes, process, forms, and schedule
- *Pre-Observation conference with the Head of School to discuss the self-assessment, current professional growth plan, and the lesson to be observed
- *Observation of at least 45 minutes or a full class period. Probationary teachers will be observed at least 3 times; career status teachers will be observed annually. During the year in which a career status teacher has a summative evaluation, the Head of School shall conduct at least 3 observations, including at least 1 formal observation.
- *Post-observation conference within 10 school days of the formal observation to discuss and document on the Rubric the teacher's strengths and weaknesses as noted during the observation.
- *Teachers collect artifacts as exemplars of their work, such as lesson plans, student work samples, and student achievement data.
- *Summary Evaluation Conference to discuss the self-assessment, current professional growth plan, classroom observation results, and data/artifacts collected. During this conference, the Head of School will complete the Teacher Summary/End-of-Year Rating Form and discuss ratings with the teacher.
- *Teachers who are rated at least Proficient on all the Standards will develop an Individual Growth Plan. Any teacher who is rated Developing on 1 or more standards will be placed on a Monitored Growth Plan.

Any teacher who is rated Not Demonstrated on any standard will be placed on a Teacher Growth Plan.

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

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

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

All teachers of grades K-8 will receive training from the Core Knowledge Foundation in Core Knowledge implementation. We will send teachers to Core Knowledge workshops using grant money from TeamCFA and will also have inhouse professional development to train and support teachers. Some of these sessions may be in partnership with other TeamCFA schools around the state.

Teachers in all grades will receive in-house training about the Trivium and Socratic questioning. All teachers will have in-house training in classroom management and positive discipline. We will provide training in data-driven

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instruction and creating and using meaningful assessments.

Training will be led by in-house experts, TeamCFA staff or by staff from other TeamCFA schools. Teachers will also receive training in differentiated instruction. Other training will include but not be limited to:

- Singapore Math
- Data-driven instructional strategies
- Reading/Literacy training
- Project-based learning strategies
- Integration of community service projects into the curriculum

Our EC teachers will conduct training sessions on EC procedures at least once a year. We will solicit input from teachers about desired professional development topics and Carolina Charter Academy - CFA teachers will facilitate as much of the professional development as they can. As our staff matures, we will increase this aspect of our training. Hopefully, we will be able to offer our teachers to other burgeoning charter schools as we have relied upon established charter schools such as Brevard Academy: A Challenge Foundation Academy and TJCA - CFA.

Some professional development courses will be content-related and will be attended by teachers in specific departments. Some will be grade-level specific.

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.*

We have scheduled ten days at the beginning of the first year for orientation, training, and professional development. New employees in the second year and beyond may be required to attend additional training days added onto the beginning of regular teacher training.

Since all teachers will be new to the school the first year, all teachers will go through new teacher orientation to fill out paperwork and learn about policies and procedures (1/2 day).

Carolina Charter Academy - CFA will provide professional development for the staff specifically for implementing the Core Knowledge Curriculum (2-3 days). Professionals from the Core Knowledge Foundation and from TeamCFA will come to the school site to train staff members. We will also have training in using the Singapore Math Curriculum as the school opens. We will enlist the help of teachers, administrators, and board members from other TeamCFA schools to lead sessions on best practices in classroom management, documentation, and the means by which charter schools can distinguish themselves within a community. Teachers will learn about differentiating instruction to accommodate all students. Our EC specialist will also train classroom and special area teachers in inclusion, EC protocol, and referrals.

Additional training time will be allocated via webinars for teachers to begin learning how to integrate project-based learning into their classes. Videos from Edutopia and Buck Institute provide excellent self-paced learning for teachers. All teachers will log this training and be expected

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to implement projects that involved community engagement.

Proposed Schedule of Training Topics & Days

Day 1 - Teacher orientation/book study on Socratic questioning techniques

Day 2 - Core Knowledge

Day 3 - Core Knowledge

Day 4 - Core Knowledge

Day 5 - NWEA MAP assessments/use of data to drive instruction

Day 6 - Singapore Math

Day 7 - Singapore Math

Day 8 - Compliance training/team building

Day 9 - Work as grade level teams

Day 10 - Work as grade level teams

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 14 teacher workdays, in which 10 will be considered mandatory professional development days at the beginning of the year and 4 (including early release) throughout the school year. To ensure a smooth start to the first year of operations, Carolina Charter Academy - CFA will provide professional development for the staff specifically for implementing the Core Knowledge Curriculum.

In the first year, there will be ten days before the start of school for orientation, training, and professional development so that the new staff can be brought up to speed. There will be at least two full or half days set aside for professional development in the first semester and at least two days in the second semester. There will also be two days at the end of the year for reflection, teacher surveys, and year-end housekeeping.

During pre-planning, professionals from the Core Knowledge Foundation, TeamCFA or TeamCFA schools will come to the school site to train staff members in this first year. We will initially use Singapore Math and will provide training for teachers.

In subsequent years, any new teachers will be required to be trained in these curricula and returning faculty will be offered refresher courses and chances to discuss best practices to refine their skills. These sessions will be led by in-house staff when possible.

In a typical year, there will be a minimum of five teacher work days for professional development the last full week before school starts. There will be four workdays scheduled during the year and two after the last day of school. We will also have a half-day for students at the end of each quarter, allowing teachers a half-day to work on completing and submitting grades.

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

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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)).

Marketing Plan

Initially Carolina Charter Academy - CFA has relied on 'word of mouth' through parent networks to begin spreading the information regarding our proposed school. Board members currently serve in public schools and have regular access to parents who are seeking alternatives to their students' learning. These parent networks will continue to be effective marketing opportunities for our school

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

1) Holding periodic informational meetings with local community, civic and religious organizations along with individual meetings with local business and civic leaders and other people who may be able to inform and/or influence families and students to enroll at the School

2) Distribution of informational literature to community businesses such as pediatrician offices, recreational facilities, churches, grocery stores, local eating establishments as well as retail and/or consignment stores that are frequented by parents.

3) Use of modern digital communication tools of Facebook, Twitter, and other medium like web site and targeted marketing. TeamCFA will setup and operate our website.

4) Creating a referral network by fostering relationships with local childcare centers, the Boys and Girls Clubs, community sporting leagues, as well as the Chambers of Commerce in Wake, Harnett and Johnston counties.

5) The Board recognizes the importance of community awareness and recruitment of parents and students. In order to promote a neighborhood school environment, the marketing strategy will start in the immediate area and then broaden to the mass market. Marketing to residents in the surrounding communities (meeting with apartment associations, and neighborhood associations) will be the primary focus. In order to ensure strong demand, marketing will occur to all appropriate populations (e.g., geographic, ethnic, age, etc.). We anticipate that the majority of students will live within a 5-10 mile radius of the school and, thus, reflect the local community being served. Targeted marketing will be used to focus on this geographic area. However, due to initial market interest in nearby Johnston and Harnett counties; we will target market to these areas using methods described above in 1-4. TeamCFA will provide \$5,000 for marketing during the planning year and \$2,500 in subsequent years. We have included additional dollars in the budget for marketing.

Also, TeamCFA provides marketing guidance:

Creation of School Identity

* School Colors

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- * School Logo bundle all versions of final logo including: full color logo, black/white, reversed out, single color, and "text only" in a variety of file formats

- * School Mascot

- * Complete Brand Guidelines outlining: use of logos, Pantone color palettes, typography specs

Create Stationary and Marketing Materials

- *Letterhead

- * Envelopes

- * In-house memo - Word Template

- * Business Cards

Brochures

- * Tri-Fold Brochure

- * FAQ brochure

Signage

- * School Site signage as needed

- * Banner-up portable signage

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.*

Carolina Charter Academy - CFA understands that the parent is the primary leader in the formation of a student, and therefore we see them as vital as volunteers. We hope to engage parents in various ways around the school (such as, reading of books to younger students, monitoring and assisting in lunch time, and other ways that have students see parents as committed to education). The school believes that constructively engaging all persons (parents, civic leaders, neighbors) creates meaningful ways to include individuals in the life of the school. Our parent and community communication plan includes:

(1) Communication Prior to Opening

Carolina Charter School - CFA is using Facebook and a temporary website (w/survey) to inform the community about the proposed school and solicit input. After application approval, TeamCFA will develop a comprehensive website to be used to engage parents and community members, recruit students, provide information about enrollment, and update parents and the community about progress towards School opening.

Outreach meetings will be held to inform the community about the School's application, classical school model, curriculum and other pertinent information.

As students enroll, the School will collect mailing addresses and email addresses to provide a means of communicating with the enrolled students and their families prior to opening. Periodically throughout the summer prior to school starting, the School will mail newsletters and information to the

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enrolled students. However, more frequently, the School will send regular email and phone communications to parents and students regarding updates on the School facilities, documentation that needs to be provided on students prior to their attending school, and opportunities to attend open houses and other school functions to be held prior to opening.

These frequent email and phone communications will provide the opportunity for the School to stay connected to the students and their families prior to the school opening, and provide the means for communicating important information to the families as they prepare for school.

Continued use of our Facebook page for targeted ads and parent/community information such as book drives, fundraising events, etc. will also help engage parents and the community.

(2) Family Partnerships

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

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

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

Parents/guardians shall be asked to attend school events and volunteer for a minimum of 5 hours of service to the School each year their child is enrolled. Volunteer opportunities may include, but are not limited to: assisting teachers in classrooms; assisting in the cafeteria; assisting teachers with tasks outside of school, such as filing, preparing curriculum materials, etc.; mentoring students; volunteering with the School's Parent Action Committee, if one is formed; chairing a school committee; chaperoning field trips; and/or attending school events.

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

(3) Community Partnerships

Carolina Charter Academy - CFA will solicit community partnership such as "sponsor a classroom", bookdrive support, job shadowing opportunities and/or 'mentor a kid', board or or committee member, mentor/tutor, community expert, field trips, audience member for student projects, etc.

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.*

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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.*

The application period begins December 15 annually. The application deadline will be in mid-March each year. During each period of enrollment, Carolina Charter Academy - CFA (CCA-CFA) will admit any eligible student who submits a timely application, unless the number of applications exceeds the capacity of the school.

Currently enrolled students at CCA - CFA should complete a Letter of Intent by the last day of January each year to indicate whether or not they intent to return. Returning students do not have to submit a new application or go through the lottery process. Students who withdraw before the last day of the current school year must reapply for admission and will follow the new student admission requirements.

A lottery will be held if more students apply than allowed by our charter. The lottery will take place in a public forum within two weeks of the application deadline. Lottery notices will be published and advertised. No applicant is required to be present at the lottery to receive a spot. After all open spots are filled, students will be placed on waiting lists by grade in the order the names are drawn. Students who are admitted or are in the first 20 wait-list spots per grade will be notified by email, phone, or mail. If admitted or enrolled students give up their places, names will be selected in order from the waiting list to fill the vacancies. Each family should accept or decline admittance in writing within 5 business days of notification. The family will provide further information about their child as well as sign a records release form if they accept the seat. As per state statute, CCA - CFA will give priority enrollment to children of the school's principal, teachers, and teacher assistants. Siblings of students enrolled and attending the previous year will also be given priority for enrollment. If a lottery is needed, one surname will be entered into the lottery to represent all multiple-birth siblings. If that surname is selected, all of the multiple-birth siblings will be admitted.

The charter school may give enrollment priority to any of the following:

- a. Siblings of currently enrolled students admitted in a previous year. The term "siblings" includes any of the following who reside in the same household: half-siblings, step-siblings, and children residing in a family foster home.
- b. Siblings of students who have completed the highest grade level offered by that school and who were enrolled in at least four grade levels offered by the charter school or, if less than four grades are offered, in the maximum number of grades offered by the charter school.
- c. Limited to no more than fifteen percent (15%) of the school's total enrollment, unless granted a waiver by the State Board of Education, the following:
 1. Children of the school's principal, teachers, and teacher assistants, full-time employees.
 2. For its first year of operation, the children of founding board members.

Carolina Charter Academy will use community meetings and open forums prior to

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the beginning of the application process. The purpose of these meetings are to inform parents about the enrollment process, and to share our school's mission/vision.

Students may withdraw or transfer at any time with written notice from parent or guardian. If the parent or guardian does not give notice and another school sends a written request for records transfer signed by the parent or guardian, this will serve as written notice.

To transfer or withdraw from CCA - CFA the following steps will need to be followed:

1. The student and parent shall sign an official Withdrawal Form.
2. The student or parent shall return all library and course books.
3. The school shall provide to the student copies of the most current report card, a transcript, interim reports, a signed withdrawal form, and attendance summaries in an enclosed, sealed envelope.
4. A Withdrawal Form will be completed by teachers for most current completed grade.

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.*

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PROJECTED ENROLLMENT

2018-19 through 2022-2023

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

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

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 920	LEA 430	LEA 510	LEA 920	LEA 430	LEA 510	LEA 920	LEA 430	LEA 510	LEA 920	LEA 430	LEA 510	LEA 920	LEA 430	LEA 510
Kindergarten	60	2	4	55	2	9	60	3	3	60	3	3	60	3	3
Grade 01	60	2	4	60	2	4	55	2	9	60	3	3	60	3	3
Grade 02	55	2	9	60	2	4	60	2	4	55	2	9	60	3	3
Grade 03	45	2	3	64	2	9	70	2	3	70	2	3	64	2	9
Grade 04	45	2	3	45	2	3	64	2	9	70	2	3	70	2	3
Grade 05	45	2	3	45	2	3	45	2	3	64	2	9	70	2	3
Grade 06	20	1	4	45	2	3	45	2	3	45	2	3	64	2	9
Grade 07	0	0	0	20	1	4	45	2	3	45	2	3	45	2	3
Grade 08	0	0	0	0	0	0	20	1	4	45	2	3	45	2	3
	330	13	30	394	15	39	464	18	41	514	20	39	538	21	39
	373			448			523			573			598		

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Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
***The applicant did not include the Federal Tax ID Number.	Kebbler Williams	Private Non-
No federal tax ID number listed.	Jessica Kelly	Private Non-
Applicant has 24 months to apply after approval.	Shannon Sellers	Tax-Exempt S
No 501 (c)(3) so applicant has 24 months.	Jessica Kelly	Tax-Exempt S
***The applicant has 24 months after approval to obtain tax- exempt status.	Kebbler Williams	Tax-Exempt S
<p>It is concerning that related parties are members of the board. While they are not the majority, it does give the appearance of conflict of interest.</p> <p>Discuss further the role of parents on the Teacher Advisory Committee. That doesn't seem to fit.</p> <p>Explain the discrepancy in your by-laws and narrative about when the annual meeting will be held.</p> <p>How will the board be evaluated?</p> <p>Explain how, in the org chart, the TAC is separate from the faculty?</p> <p>What circumstances would allow a board member to be compensated as listed in your bylaws?</p> <p>What is the difference between the PAC and the PTO?</p> <p>Where does the Instructional Coach provided by Team CFA fit in the org. Chart?</p> <p>Articles of Incorporation are missing.</p> <p>Article V Section 6 of the by-laws are in violation of Open Meeting Laws. No action can be taken while not in a public open session.</p>	Jennifer Gnann	Governance a
<p>Missing board resumes for two of the members.</p> <p>Board is missing members who several areas of expertise that will be needed to open a successful school.</p> <p>Bi-laws need to be revised...Article V, Section 6 - open meeting laws.</p> <p>Conflict of interest between board members possible with current members listed.</p>	Jessica Kelly	Governance a
<p>***The board does not appear to have any expertise in the areas of real estate, marketing, or elementary education. How will the board address these areas of need?</p> <p>***There are 5 board members currently on the board. The board intends to add a board member with expertise in legal matters (i.e., an attorney) and a board member with expertise with fundraising. If the board also adds a TeamCFA board representative, that will bring the number to 8. How will the board handle this as it conflicts with the board's stated maximum of 7 board members?</p> <p>***The applicant has not provided an adequate plan for orientation of new board members and ongoing professional development of existing board members. Specifically, what is the timetable and requirement for participation?</p> <p>***Are there any existing relationships that could pose an actual or perceived conflict of interest, such as the married couple serving on the board?</p> <p>***The applicant needs to clarify the bylaws: Article IX, Section 6. Under what circumstances will voting members of the board receive compensation from the corporation?</p> <p>***Article V, Section 6 of the bylaws is not allowed. Charter school board of directors cannot take action without a meeting.</p> <p>***What will be the board's relationship with and interaction with the Parent Action Committee?</p> <p>***What is the criteria for the evaluation of the governing board, board members, the lead administrator, and TeamCFA?</p>	Kebbler Williams	Governance a

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***The applicant did not provide a criminal background check for Kellie Nothstine.		
With only 5 board members and 2 that seemed to be relater, could there be a conflict of interest? The applicant states the board will consist of 5 to 7 members. Currently there are 5 members but in the narrative it is suggested the possibility of adding 3 additional board members that would contradict its bylaws. What is the difference between the PAC and the PTO? How do the two interact with the Board? How will be the board be evaluated? How will the administrator be evaluated? The By-laws and the narrative contradict when the annual meeting will be held. Will it be in May or July? Action cannot be taken by board without a meeting. All actions must be voted on by the Board in Open Session. The By-laws give the board the right to take action without a meeting. How does a voting member receive compensation?	Shannon Sellers	Governance a
Bylaws state that board will meet quarterly. Organizational chart is confusing. Is BOD directly supervising teachers, staff and parent committees?	Sherry Reeves	Governance a
Two resumes are missing for board members. What about the possible perceptions of conflict?	Tammi Sutton	Governance a
Does not plan to have an EMO	Shannon Sellers	Proposed Man
***This section is not applicable.	Kebbler Williams	Proposed Man
Will there be a direct line of interaction between the board and the teachers? Expand upon the relationship between the staff and the board.	Jennifer Gnann	Staffing Pla
***Will it be a requirement of the hiring process for teacher assistants to have a CDL and be willing to drive a bus? ***Other than the school employees being employees of the board, are there any other facets of the relationship between the board and school employees? ***What are the board's procedures for dismissing school personnel? ***What is the salary range for all levels of employment? ***How long does the board intend to take to act upon a grievance once received? ***What is the school's plan for providing qualified staff for gifted students?	Kebbler Williams	Staffing Pla
How will you retain teachers with only indicating competitive salaries? Will this be based on the state pay scale schedule? Are you starting all teachers, regardless of years of experience and education at \$42,000/year? More details are needed on benefits and retirement system plan. Head of School description does not indicated monitoring of 504s as indicated earlier in application. Clear explanation of the relationship between the school employees and board not given.	Jessica Kelly	Staffing Pla
How does board intend to attract highly qualified teachers with experience in classical education? Will 10 days of professional development in Core Knowledge and Singapore Math (plus project-based learning) right before school starts be sufficient to effectively train teachers in a rigorous curriculum? Narrative states earlier that there will be 2 transportation routes but staffing only includes 1 part-time bus driver. No counselor/social worker listed. Narrative states that CCA will not participate in the state health plan or the state retirement plan. Later it states that there will be health benefits and retirement options. Please clarify. Will board offer a supplement to its teachers like Wake County?	Sherry Reeves	Staffing Pla
What relationship will staff have with the board? What is the dismissal process for staff? Besides teacher salary range, what is the range for all other employees?	Shannon Sellers	Staffing Pla
***The school calendar does not clearly indicate when teacher workdays and/or early release days will be devoted to professional development, therefore the evaluator	Kebbler Williams	Staff Evalua

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cannot make a determination on whether all school staff will receive ongoing focused professional development to effectively implement the school's mission, instructional methodologies, and the education program.		
Professional development days on school calendar are not adequate. Cramming in two new curriculum's in 10 days does not indicate that teachers will be fully prepared. How does this align with the proposed budget?	Jessica Kelly	Staff Evalua
Why are there only 4 days for professional development? When will teachers learn all of the specific curriculum?	Tammi Sutton	Staff Evalua
See note in earlier section regarding professional development.	Sherry Reeves	Staff Evalua
Explain further how the professional development mentioned in the narrative is illustrated in the calendar as presented in Appendix C. It appears that during the school year, only 4 1/2 days will be provided.	Jennifer Gnann	Staff Evalua
How does the Professional Development align with the school calendar presented earlier in the application? Will 14 workdays be enough to fully train teachers new to the curriculum and processes you plan to deliver the first year?	Shannon Sellers	Staff Evalua
How does this align with proposed marketing budget?	Jessica Kelly	Marketing Pl
How will you market to a wide range of families - especially those who do not have access to technology and social media?	Tammi Sutton	Marketing Pl
How is SAC different that the other two organizations mentioned earlier, PAC and TAC?	Jessica Kelly	Parent and C
What will you do if parents do not volunteer for at least 5 hours?	Tammi Sutton	Parent and C
How does the SAC differ from the PAC and the TAC mentioned in governance section?	Jennifer Gnann	Parent and C
***What is the consequence if parents do not volunteer the minimum of 5 hours per year? ***The applicant's response implies that there is some question as to whether a Parent Action Committee (PAC) will be formed, yet that committee is part of the school's organization chart. Will there definitely be a Parent Action Committee? ***The applicant mentions a School Advisory Council (SAC) in this part of the application and a Teacher Advisory Council (TAC) in another part of the application. Will the school have a PAC, SAC, and a TAC? If so, what will be the relationship between each of these groups and the board?	Kebbler Williams	Parent and C
There is not mention of the PAC or the PTO in this section as mentioned previously. However, there is mention of the SAC. What is the SAC? Will there not be a PAC or PTO? How will you hold parents accountable for the 5 hours of volunteering? What if they don't fulfill this request?	Shannon Sellers	Parent and C
Explain the variance in the home LEA of origin for students from one year to the next.	Jennifer Gnann	Projected St
Explain the variance in enrollment by grade.	Sherry Reeves	Projected St
No weighted lottery.	Jessica Kelly	Weighted Lot
Does not apply to this application.	Shannon Sellers	Weighted Lot
***This section is not applicable.	Kebbler Williams	Weighted Lot

Reviewer	Score
Alex Quigley	Pass
Steven Walker	Pass
Deanna Townsend-Smith	
Jennifer Gnann	Fail
Jessica Kelly	Fail
Glenn Allen	
Kebbler Williams	Fail
Phyllis Gibbs	
Robert McOuat	
Shannon Sellers	Fail
Sherry Reeves	Fail
Tammi Sutton	Fail

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Anthony Helton	
Walter Finnigan	Pass

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V. OPERATIONS

Transportation Plan:

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

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

The school will provide transportation to drop-off and pick-up locations. We anticipate providing transportation to approximately 1/4 of our students in the first year and expect that to grow to approximately 35%.

CCA-CFA will provide transportation for any student with a disability who has transportation related to their disability indicated on the IEP.

School Lunch Plan:

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

Each student at Carolina Charter Academy - CFA will be expected to bring a bag lunch to school. However, if a child does not have a bag lunch on any given day the school will provide a lunch for that child. The budget includes a \$45/day provision to ensure that no child lacks a daily meal. We expect we can feed 10% of the enrollment with this allocation. If a child is repeatedly arriving without a lunch, communication with the parents of the child will be held to determine the affordability of lunch for the child. If a child's parents do not qualify for free and reduced lunch but, due to extenuating circumstances, cannot afford to provide lunch, long-term plans will be made on a case-by-case basis to furnish the child with a nutritious meal.

CCA-CFA will also work with vendors, caterers and local restaurants and give students the opportunity to purchase lunches on some days. Funding will be provided for those students that don't bring their lunch or can't afford to purchase lunch.

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

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7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$1,687.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,875.00
Property Insurance	\$250,000		\$895.00
Motor Vehicle Liability	\$1,000,000		\$.00
Bonding Minimum/Maximum Amount	\$250,000	\$1,000,000	\$4,704.00
Other	\$1,000,000		\$2,800.00
Total Cost			\$13,961.00

*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.

carolinacharter 09/19/2016

(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.

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.

Carolina Charter Academy - CFA has identified three properties that could potentially house the school and are actively working with a realtor and developer (Highmark Properties) to determine site feasibility and adherence to the proposed budget for leasing.

With a minimum requirement of approximately 28,800 square feet, we have identified the following sites:

400 West Ransom Street, Fuquay-Varina, NC is a 15,000 square foot facility that has room for expansion to meet the needs of our school. This would

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include the placement of modular classrooms on the property to accommodate student enrollment. The current owner is not interested in leasing the facility, but will consider a lease-to-own option with the right development partner.

6124 Dwight Roland Road, Fuquay-Varina, NC is a former church building that is for sale/lease. The existing structure has 10,000 square feet and additional 2.5 acres for expanding the building footprint.

6017 S NC 55 Highway Fuquay Varina, NC is a 230,000 square foot warehouse facility that has a great location and plenty of space to accommodate our growth. While this property would require substantial renovations/modifications; the pricing for the entire facility is good and the owner along with our developer feel that with existing infrastructure in place to support a school; this may be a cost-effective option with a one-year planning timeline.

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

We understand that no state funding will be provided until we have secured a certificate of occupancy. Our goal is to have a certificate of occupancy by July 1 prior to the school opening.

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.

The cost of the larger facility is under \$5.25 per square foot and includes ample parking space. The other two buildings have an estimated lease of \$16/per square foot. We anticipate a lease rate between \$15-\$19/sq. ft. based upon location/condition.

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.*

The Board has every expectation that we will be able to open our School on time. At opening in Year 1, the School's immediate spatial needs will include 16 classrooms, 2-3 classrooms for electives (art, music, special education, etc), a multi-purpose room, outdoor space, and administrative space.

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

1. Define the specifics of the delay and determine a realistic opening schedule.

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2. Coordinate and communicate this information with Office of Charter Schools (OCS) personnel.

3. Determine whether the School can open on a delayed schedule.

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

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

Option 2: If the School cannot open on a delayed schedule, the School will temporarily lease modular structures on several identified 'pad-ready' sites that the realtor/developer have identified. Contingency plans for temporary space and short-term leases will be in-place by February 2018.

Option 3: If the construction schedule is such that the School opening is delayed 5 or more months, the School will (as a last resort) request a one year deferral for opening.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
The applicant budgeted \$22,000 for fuel \$15,000 to purchase two buses along with additional money for oil and tires. The applicant only budgeted one position for a bus driver. If the school anticipates providing transportation for one quarter of the student population they will need two buses, how are they going to provide this service?	Walter Finnigan	Transportati
Transportation plan is not detailed enough. How will this be budgeted for? If only 1/4 students are expected to ride first year how will the other 3/4 of students be arriving and dismissing from school. What is the plan for students who cannot provide transportation? Earlier it was indicated that there would be one bus driver. How will this be implemented in the transportation plan if multiple students need to be picked up and dropped off in various areas?	Jessica Kelly	Transportati
***How will drop-off and pick-up locations be determined? ***What adjustments will be made to the plan if students are unable to get to the drop-off and pick-up locations? ***Is the applicant prepared to increase its budget and drop-off/pick-up locations if more students need bus transportation than originally estimated?	Kebbler Williams	Transportati
How will you determine drop off and pick up locations? What if a student cannot get to those locations?	Tammi Sutton	Transportati
Explain further y our plan. How will transportation be provided? How will you budget for this?	Jennifer Gnann	Transportati
Will these be busses? How many drop-off/pick-up locations do you anticipate?	Steven Walker	Transportati
Transportation plan lacks details. Applicant states that an anticipated 25% of first year enrollment will need transportation. This equates to 93 students. This will require at least 2 buses.	Sherry Reeves	Transportati
How will pick up and drop off locations be determined? How will you ensure that all students will be able to get to the drop-off/pick-up locations? This plan needs to be expanded as it is vague.	Shannon Sellers	Transportati
Explain this plan further. Details are missing.	Jennifer Gnann	School Lunch
I'm confused about this... If Wake County is 33% F/R Lunch, why plan for 10%. Also, what are the schools qualifications for a F/R lunch if the school is not participating in the NSLP?	Steven Walker	School Lunch
This doesn't match with the 33% ratio of FRL in the projected student population.	Alex Quigley	School Lunch
Lunch plan is lacking details. How will it be determined if a student qualifies for free/reduced lunch? Who is contacting parents about lunch affordability?	Jessica Kelly	School Lunch
Do you expect only 10% of your students to qualify for free or reduced lunches? What if you have more?	Tammi Sutton	School Lunch

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Will there be provisions for students who qualify for free or reduced lunch? Can you ensure that this will not be a barrier to a student who desires to attend CCA?	Sherry Reeves	School Lunch
What happens to a student that cannot afford to bring his/her lunch from home? How do you determine who is eligible for free/reduced lunch? Who will contact parents about students repeatedly not coming to school with lunch? This plan lacks details and should be expanded.	Shannon Sellers	School Lunch
***The applicant needs to clarify its lunch plan by including more detail about how students who would qualify for free and reduced price lunch will be identified and have a lunch provided by the school. ***With the calculation provided, is the applicant only expecting 10% of its students to qualify for free or reduced price lunch?	Kebbler Williams	School Lunch
How will you not have transportation liability? There is no charge for this on the quote.	Shannon Sellers	Civil Liabil
You state that you will be providing transportation, yet you don't intend to carry Motor Vehicle insurance? It's also unclear why there is no quote on insuring a school building? Is that a part of your lease?	Jennifer Gnann	Civil Liabil
Why is motor vehicle liability at a cost of \$0? Are you not planning on carrying? How is this possible if you are providing transportation?	Jessica Kelly	Civil Liabil
Not signed by a person	Jennifer Gnann	Healthy and
Was this statement signed by the board chair?	Sherry Reeves	Healthy and
Not signed by board chair.	Jessica Kelly	Healthy and

Reviewer	Score
Alex Quigley	Pass
Steven Walker	Pass
Walter Finnigan	Pass
Anthony Helton	
Tammi Sutton	Fail
Sherry Reeves	Fail
Shannon Sellers	Fail
Robert McOuat	
Phyllis Gibbs	
Kebbler Williams	Pass
Glenn Allen	
Jessica Kelly	Fail
Jennifer Gnann	Fail
Deanna Townsend-Smith	

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

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

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

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

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

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

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1 920 - Wake County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,873.23	330	\$1,608,165.90
Local Funds	\$2,340.00	330	\$772,200.00
Federal EC Funds	\$3,579.70	33	\$118,130.10
Totals			\$2,498,496.00

LEA #2 430 - Harnett County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,344.07	13	\$69,472.91
Local Funds	\$1,028.00	13	\$13,364.00
Federal EC Funds	\$3,579.70	1	\$3,579.70
Totals			\$86,416.61

LEA #3 510 - Johnston County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$5,159.62	30	\$154,788.60
Local Funds	\$1,530.00	30	\$45,900.00
Federal EC Funds	\$3,225.14	3	\$9,675.42
Totals			\$210,364.02

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

INCOME: REVENUE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
-State ADM Funds	\$1,832,427	\$2,200,576	\$2,569,326	\$2,814,576	\$2,937,376
-Local Per Pupil Funds	\$831,464	\$998,645	\$1,165,829	\$1,277,217	\$1,332,942
-Exceptional Children & Federal Funds	\$131,385	\$156,200	\$184,600	\$202,350	\$209,450
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$2,795,277	\$3,355,421	\$3,919,755	\$4,294,143	\$4,479,768

***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.

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	\$80,000	\$80,000	1	\$80,500	\$80,500	1	\$81,000	\$81,000	1	\$81,500	\$81,500	1	\$82,000	\$82,000
Assistant Administrator	1	\$65,000	\$65,000	1	\$65,500	\$65,500	1	\$66,000	\$66,000	1	\$66,500	\$66,500	1	\$67,000	\$67,000
Finance Officer	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Clerical	2	\$24,000	\$48,000	2	\$24,500	\$49,000	3	\$25,000	\$75,000	3	\$25,500	\$76,500	3	\$26,000	\$78,000
Food Service Staff	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Custodians	1	\$25,000	\$25,000	1.5	\$25,500	\$38,250	1.5	\$26,000	\$39,000	2	\$26,500	\$53,000	2	\$27,000	\$54,000
Transportation Staff	1	\$22,000	\$22,000	1	\$22,500	\$22,500	1.5	\$23,000	\$34,500	1.5	\$23,500	\$35,250	1.5	\$24,000	\$36,000
A - Total Admin and Support:	6		\$240,000	6.5		\$255,750	8		\$295,500	8.5		\$312,750	8.5		\$317,000
Instructional Personnel:															
Core Content Teacher(s)	16	\$42,000	\$672,000	19	\$42,500	\$807,500	21	\$43,000	\$903,000	23	\$43,500	\$1,000,500	25	\$44,000	\$1,100,000
Electives/Specialty Teacher(s)	3	\$42,000	\$126,000	3	\$42,500	\$127,500	3	\$43,000	\$129,000	3	\$43,500	\$130,500	3	\$44,000	\$132,000
Exceptional Children Teacher(s)	2	\$42,000	\$84,000	2.5	\$42,500	\$106,250	3	\$43,000	\$129,000	3	\$43,500	\$130,500	3	\$44,000	\$132,000
Instructional Support	1	\$39,000	\$39,000	2	\$39,500	\$79,000	2	\$40,000	\$80,000	2	\$40,500	\$81,000	2	\$41,000	\$82,000
Teacher Assistants	6	\$20,000	\$120,000	6	\$20,500	\$123,000	6	\$21,000	\$126,000	6	\$21,500	\$129,000	6.5	\$22,000	\$143,000
B - Total Instructional	28		\$1,041,000	32.5		\$1,243,250	35		\$1,367,000	37		\$1,471,500	39.5		\$1,589,000

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Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	34		\$1,281,000	39		\$1,499,000	43		\$1,662,500	45.5		\$1,784,250	48		\$1,906,000
Administrative & Support Benefits															
Health Insurance	5	\$528	\$2,640	6	\$558	\$3,348	7	\$570	\$3,990	7	\$588	\$4,116	7	\$593	\$4,151
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	5	\$2,406	\$12,030	6	\$2,261	\$13,566	7	\$2,205	\$15,435	7	\$2,209	\$15,463	7	\$2,211	\$15,477
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	5	\$924	\$4,620	6	\$930	\$5,580	7	\$922	\$6,454	7	\$921	\$6,447	7	\$921	\$6,447
Medicare	5	\$581	\$2,905	6	\$522	\$3,132	7	\$519	\$3,633	7	\$518	\$3,626	7	\$522	\$3,654
Social Security	5	\$2,606	\$13,030	6	\$2,430	\$14,580	7	\$2,417	\$16,919	7	\$2,411	\$16,877	7	\$2,418	\$16,926
D - Total Admin and Support Benefits:	25		\$35,225	30		\$40,206	35		\$46,431	35		\$46,529	35		\$46,655
Instructional Personnel Benefits:															
Health Insurance	28	\$528	\$14,784	32	\$558	\$17,856	35	\$570	\$19,950	37	\$588	\$21,756	40	\$593	\$23,720
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Retirement Plan--Other	28	\$2,257	\$63,196	32	\$2,177	\$69,664	35	\$2,134	\$74,690	37	\$2,130	\$78,810	40	\$2,122	\$84,880
Social Security	28	\$545	\$15,260	32	\$519	\$16,608	35	\$515	\$18,025	37	\$512	\$18,944	40	\$510	\$20,400
Disability	28	\$723	\$20,244	32	\$711	\$22,752	35	\$708	\$24,780	37	\$702	\$25,974	40	\$696	\$27,840
Medicare	28	\$503	\$14,084	32	\$491	\$15,712	35	\$488	\$17,080	37	\$483	\$17,871	40	\$480	\$19,200
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional Personnel Benefits:	140		\$127,568	160		\$142,592	175		\$154,525	185		\$163,355	200		\$176,040
D+E = F - Total Personnel Benefits	165		\$162,793	190		\$182,798	210		\$200,956	220		\$209,884	235		\$222,695
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	31		\$275,225	36.5		\$295,956	43		\$341,931	43.5		\$359,279	43.5		\$363,655

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B+E = H - Total Instructional Personnel (Salary & Benefits)	168		\$1,168,568	192.5		\$1,385,842	210		\$1,521,525	222		\$1,634,855	239.5		\$1,765,040
G+H = J - TOTAL PERSONNEL	199		\$1,443,793	229		\$1,681,798	253		\$1,863,456	265.5		\$1,994,134	283		\$2,128,695

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

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Office:	Office Supplies	\$7,500	\$8,500	\$9,000	\$10,000	\$10,000
	Paper	\$5,000	\$6,000	\$6,800	\$7,250	\$7,500
	Computers & Software	\$25,000	\$5,000	\$2,500	\$5,000	\$2,500
	Communications & Telephone	\$7,500	\$8,700	\$9,000	\$9,250	\$10,000
	Copier leases	\$9,250	\$10,000	\$10,250	\$11,000	\$11,300
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$10,000	\$12,000	\$14,000	\$14,000	\$14,000
	Student Accounting	\$4,500	\$5,500	\$6,000	\$6,700	\$7,500
	Financial	\$21,000	\$23,500	\$27,500	\$30,000	\$33,500
	Other Professional	\$75,000	\$125,000	\$190,000	\$192,500	\$195,000
Facilities	Facility Lease/Mortgage	\$550,000	\$625,000	\$690,000	\$770,000	\$845,000
	Maintenance	\$26,000	\$32,000	\$35,400	\$40,000	\$45,000
	Custodial Supplies	\$14,000	\$16,500	\$17,250	\$18,000	\$19,000
	Custodial Contract	\$0	\$0	\$0	\$0	\$0
	Insurance (pg19)	\$13,961	\$15,357	\$16,124	\$17,737	\$18,624
	Other	\$95,000	\$12,500	\$12,500	\$12,500	\$12,500
Utilities	Electric	\$45,000	\$55,000	\$58,000	\$59,000	\$62,500
	Gas	\$10,000	\$11,000	\$12,000	\$13,000	\$14,000
	Water/Sewer	\$14,000	\$15,000	\$16,000	\$17,000	\$18,000
	Trash	\$4,000	\$4,750	\$5,500	\$6,000	\$6,500
Transportation	Buses	\$15,000	\$10,000	\$0	\$5,000	\$0
	Gas	\$22,000	\$28,000	\$29,000	\$30,000	\$31,000
	Oil/Tires & Maintenance	\$10,000	\$15,000	\$17,500	\$18,500	\$20,000
Other	Marketing	\$12,000	\$10,000	\$10,000	\$10,000	\$10,000
	Child nutrition	\$18,500	\$22,500	\$26,000	\$28,250	\$29,250
	Travel	\$10,500	\$14,000	\$16,500	\$18,000	\$19,500
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$1,024,711	\$1,090,807	\$1,236,824	\$1,348,687	\$1,442,174
	Instructional:					
Instructional Contract	Staff Development	\$25,000	\$28,000	\$19,000	\$19,000	\$19,000
Classroom Technology	Software	\$40,000	\$20,000	\$20,000	\$20,000	\$20,000

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Books and Supplies	Instructional Materials	\$30,000	\$15,000	\$15,000	\$15,000	\$15,000
	Curriculum/Texts	\$35,000	\$10,000	\$10,000	\$10,000	\$10,000
	Copy Paper	\$8,000	\$8,500	\$9,000	\$9,500	\$10,000
	Testing Supplies	\$12,000	\$13,250	\$14,000	\$15,000	\$16,250
	Other	\$0	\$37,500	\$37,500	\$211,500	\$50,000
	L - TOTAL Instructional Operations	\$150,000	\$132,250	\$124,500	\$300,000	\$140,250
	K+L = M - TOTAL OPERATIONS	\$1,174,711	\$1,223,057	\$1,361,324	\$1,648,687	\$1,582,424

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$1,443,793	\$1,681,798	\$1,863,456	\$1,994,134	\$2,128,695
M - TOTAL OPERATIONS	\$1,174,711	\$1,223,057	\$1,361,324	\$1,648,687	\$1,582,424
J+ M =N TOTAL EXPENDITURES	\$2,618,504	\$2,904,855	\$3,224,780	\$3,642,821	\$3,711,119
Z - TOTAL REVENUE	\$2,795,277	\$3,355,421	\$3,919,755	\$4,294,143	\$4,479,768
Z - N = SURPLUS / (DEFICIT)	\$176,773	\$450,566	\$694,975	\$651,322	\$768,649

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.

Based upon initial survey data feedback, current overcrowding issues and continuing increased in class sizes in areas schools; parents are seeking alternatives to their current schools. In addition, parents are seeking a more classical approach to education that isn't offered in this part of the county and in neighboring counties that Carolina Charter School would target for student enrollments.

Demand

As of the submission of this application, Carolina Charter Academy - CFA (CCA-CFA) has received parent interest surveys representing 210 families wishing to enroll in 2018. This represents significant interest, considering promotion so far has been word of mouth, and Internet-based and we have yet to begin the process of promoting enrollment.

Serving a Need

CCA-CFA seeks to serve a specific niche through its application of the classical learning model of the Trivium, Core Knowledge Curriculum, and experiential learning.

Break-Even Point

Based upon the idea of our costs being fixed at levels to support 373 students, our break-even point is about 321 students. This, of course, does not take into consideration the fact that some costs (specifically personnel and benefits) will fall with decreasing enrollment. If we hit our target for full enrollment, we stand to see a surplus of over \$160,000 in the first year. Our goal is to have a minimum of \$400,000 - 750,000 as a contingency in each subsequent year.

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

Assuming Carolina Charter Academy - CFA receives a charter, we will aggressively pursue fundraising and loan opportunities with the intention of having a facility and a certificate of occupancy in the Spring of 2018 in

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order to be eligible for our first drop of state dollars in July 2018.

In the event that our revenue stream is less than expected as a result of under-enrollment, we will adjust accordingly. We will be more conservative in our hiring initially (as reflected in our first-year staff projections) in the hopes that we would not be forced to lay off employees.

With fewer students, it would be possible to hire even fewer staff initially and consolidate sections within a grade if numbers dictated that we do so. In addition, we could delay hiring some of our support staff (media/literacy, nurse, etc.).

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

The budget does not rely on sources of funds other than state, county, and federal allocations. Through our partnership with TeamCFA, they provide a \$50,000 forgivable loan to be used for planning year expenses. They provide other in-kind and grant funding that is reflected in decrease allocations in the operations budget. Examples include grant funding for the 1st year to purchase student devices and classroom projection system, providing marketing funds, and a 1/2 instructional coach. See Appendix O for the letter of intent between TeamCFA and Carolina Charter Academy.

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

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

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

Carolina Charter Academy - CFA (CCA-CFA) plans to contract for financial services.

CCA-CFA will provide related educational services, as specified under IDEA and as outlined in a student's IEP. These services will be provided by certified/licensed staff or by contracting with professionals in the community. The school will ensure that these professionals meet all required licensure and/or certification requirements pertaining to their area of service. Funds are set aside for contracted services in the CCA - CFA budget.

CCA-CFA will compare the expense of hiring a staff member for custodial services versus contracting such services with an outside vendor once approved, but at the time of this application; we are budgeting for full-time custodial/maintenance staffing.

Regarding large purchases, CCA - CFA's board represents a broad crosssection of the community and are well-connected to business and service providers. Always careful to avoid conflicts of interest, the board and school director will attempt to meet the school's material needs locally when cost-effective and practical. The board's finance committee will develop policies governing the selection of contractors and large purchases (e.g., formal bid requirements for large purchases).

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

The board of Carolina Charter Academy - CFA (CCA-CFA), TeamCFA's State Director, and TeamCFA corporate officers have contributed to the structuring of this charter application. We have studied the budgets of other TeamCFA schools in North Carolina, particularly in their first few years and built our application accordingly. We have taken into account our unique program objectives, geography, marketplace, and community needs. We have structured the budget to be initially very conservative in its hiring and operating expenditures. While our intent is to grow the school slowly and deliberately and not over-extend ourselves fiscally; we also want the flexibility to be able to immediately meet the needs of increased student enrollment should the need arise.

Curriculum: Students will benefit from the well-established Core Knowledge Curriculum, and the budget will allow the school to buy needed curricular materials and expand our elective offerings in response to demand. TeamCFA schools integrate technology effectively into their studies; thus CCA-CFA will lease and/or purchase Chromebooks for all students. Our budget reflects a substantial investment in technology, digital resources and the professional development that accompanies these tools and strategies.

Transportation: We realize that in order to reach our enrollment targets, families may require help getting to and from school. Our transportation plan calls for the purchase of at least two buses to be used for bus routes and frequent field trips, a common request from our prospective parents.

Facilities: CCA-CFA must provide safe facilities that are conducive to learning. We are pursuing several options for leasing existing buildings with some renovations as well as allowing for the leasing of modular units for the first 1-3 years as a contingency during construction/renovation. We are budgeting between 18% - 20% for facility costs which is closer to the costs of new construction; which we eventually will acquire. However, we wanted to be proactive and not seek a new facility build in our first few years due to timeline/construction concerns, permitting, etc. Typically TeamCFA schools identify facilities that can be renovated in order to maximize the budget for instruction versus operations.

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

Describe how the school will develop the fund balance.

Our long term goal for a fund balance will be 20% of one year's operating budget, which we hope to achieve within 5-10 years of the school's existence. In our proposed budget, we show an annual surplus of 7% in the first year, growing to an annual surplus of almost 20% by year five.

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

Our plan for the first five years is to lease land and facilities. We will work with a national charter school development firm who has successfully financed and constructed schools in North Carolina to lead this process. Lease payments and additional operation needs during facility development

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will be handled through State ADM funds and TeamCFA forgivable loans (See Appendix O).

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*

Through our partnership with TeamCFA, Carolina Charter Academy will apply for grant funding for student devices and classroom projection systems for the 1st year. TeamCFA will also provide marketing funds and a 1/2 time instructional coach.

We will explore saving money by working the State of NC surplus for office and classroom furniture.

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

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

The board's Finance Committee will develop financial management and internal control policies for Carolina Charter Academy - CFA, drawing heavily on policies in place at other TeamCFA partner schools. Control and oversight are the responsibilities of the board members, Head of School and Administrative Assistants that will work in closely with our financial services consultant to manage the school's assets responsibly..

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

We will have no know related parties involved in transactions pertaining to the school.

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.

Carolina Charter Academy - CFA has investigated the following firms:

Elliott Davis, PLLC
Kelly Cantweil, CPA, Manager
5410 Trinity Road
Raleigh NC 27607
o) 919-987-2751
f) 919-987-2851

This firm is in multiple locations in the State, and they will decide which partner(s) handles the audit.

LBA Haynes Strand, PLLC
Courtney LaLone, CPA
212 W. Matthews St., Suite 102
Matthews, NC 28105

Phone:
704-841-1120

Fax:
704-841-4901

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
No appendix M.	Jessica Kelly	Total Budget
There is no working capital for the first 5 years.	Shannon Sellers	Total Budget
I did not see Appendix M. There is no working capital for the first 5 years.	Tammi Sutton	Total Budget
Will there be "other funds" provided by Team CFA? Application mentions funding from Team CFA several times earlier.	Sherry Reeves	Total Budget
Admin salaries are high based on the number of students.	Jennifer Gnann	Personnel Bu
Would like to hear more about the health care plan. Seems a little on the low side.	Steven Walker	Personnel Bu
***Which employee from the Administrative and Support Personnel is not getting benefits? Why is that employee the only one of 34 not getting benefits? If this was a clerical error, the budget is off by \$7045 in year one and additional amounts in subsequent years.	Kebbler Williams	Personnel Bu
\$0 budgeted for finance officer (contract?) and food service (will there be a cafeteria area?); no counselor, social worker, nurse. Only 1 transportation staff but based on narrative there will be a need for at least 2 buses.	Sherry Reeves	Personnel Bu
Why don't the benefits match the number of employees? Why is there no financial officer? Who will handle the finances?	Shannon Sellers	Personnel Bu
The salary for the starting leader is high. There is no financial officer. Where there be one or two bus routes and bus drivers?	Tammi Sutton	Personnel Bu
Administration salaries are high based on student population. It is very concerning there is no financial officer. Number of staff and number of benefits do not match.	Jessica Kelly	Personnel Bu
What are the "Other Professional" costs listed under Professional Contract? Budgeted amounts in year 1 are \$75,000 and increase to \$195,000 by year 5. Explain \$95,000 "Other" under facilities in year 1. Are the amounts given for buses for the purchase of buses? No allotment for years 3 and 5. Child nutrition is very low. Explain anticipated costs under "Travel"/Other, Explain the \$211,500 listed under "Other"/Books and Supplies year 4.	Sherry Reeves	Operations B
Are their funds budgeted for contracted related services such as OT, PT, Speech, and Psychological Services?	Glenn Allen	Operations B
***The applicant needs to clarify the "Other" line item in the instructional operations budget.	Kebbler Williams	Operations B
Office supply line item is very low for the first year. Seems unreasonable to have only one custodian without any contracted support. \$95,000 in other facilities? What is included? What is included in the \$75,000 "Other Professional contract?"	Jennifer Gnann	Operations B
Number of bus routes/drivers?	Tammi Sutton	Operations B
What constitutes "Other Professionals?" Is this contract people for exceptional children?	Shannon Sellers	Operations B
No money budgeted for contract services such as PT or OT; is this accurate?	Jessica Kelly	Operations B
What is other professional budgeted \$75,000? What does this include?		
Is the projection to purchase two buses for \$15,000 total and only spend \$22,000 on gas? How were these numbers arrived at?	Jennifer Gnann	Budget Narra

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The transportation narrative talks about two buses, yet only one transportation salary is budgeted for and transportation insurance is not included in the quote.		
***The application contains conflicting information. In one section, it says that the student to teacher ratio will be 22:1 in K-2 and 25:1 in 3-8. Here it says 22:1 for K-5 and 25:1 in 6-8. Which is correct? ***What is the financial benefit of leasing Chromebooks vs. purchasing them? ***The board has not yet developed policies governing the selection of contractors and large purchases. ***How will the school develop the fund balance?	Kebbler Williams	Budget Narra
Classroom ratios conflict from earlier in the application. What is the correct ratio? Is \$15,000 enough for 2 buses?	Shannon Sellers	Budget Narra
Break-even is 321 students.	Sherry Reeves	Budget Narra
Transportation is indicated two buses but only one driver - is this accurate? Student to teacher ratio is conflicting from earlier in the application.	Jessica Kelly	Budget Narra
Who will be in charge of preparing for the audit with no financial officer overseeing?	Jessica Kelly	Financial Au
Expand upon the auditing process.	Jennifer Gnann	Financial Au

Reviewer	Score
Alex Quigley	Pass
Anthony Helton	
Tammi Sutton	Pass
Sherry Reeves	Pass
Shannon Sellers	Pass
Robert McOuat	
Walter Finnigan	Pass
Kebbler Williams	Pass
Glenn Allen	
Jessica Kelly	Pass
Jennifer Gnann	Pass
Deanna Townsend-Smith	
Steven Walker	Pass
Phyllis Gibbs	

Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

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).

carolinacharter

Date: 09/19/2016

Applicant Signature:

The foregoing application is submitted on behalf of Carolina Charter Academy - A CFA (*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: carolinacharter

Board Position: Jaime Stoops, Board Chair

Signature: _____

Date: 09/19/2016

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

Notary Public

Official Seal

Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

My commission expires: _____, 20_____.

Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

OVERALL ASSESSMENT

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

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

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

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

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

<u>CSAB Votes</u>	
No	Yes
0	7

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

Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

Mission, Purposes, and Goals	- tammisutton1974
Education Plan	- tammisutton1974
Governance and Capacity	(1) Applicant has 24 months after approval to obtain tax exempt status (2) One page resumes are missing for 2 of the 5 board members. Resumes are needed for Stephanie Nall and Terry Stoops (3) The Articles of Incorporation from the Secretary of State's Office is missing and is required in order to apply per NC GS. - tammisutton1974
Operations	- tammisutton1974
Financial Plan	(1) Applicant has 24 months after approval to obtain tax exempt status (2) One page resumes are missing for 2 of the 5 board members. Resumes are needed for Stephanie Nall and Terry Stoops (3) The Articles of Incorporation from the Secretary of State's Office is missing and is required in order to apply per NC GS. - tammisutton1974
OVERALL	- dtsmith840 - tammisutton1974 - tammisutton1974

External Evaluator

Mission, Purposes, and Goals	<p><u>Mission Statement</u> ***How would the board describe the mission of the school without using words from the mission statement? - kwilliams75</p> <p><u>Mission Statement</u> The applicant restates the mission when asked to describe the mission. - shannon1974</p> <p><u>Mission Statement</u> With 27 schools already established and utilizing the core knowledge program in North Carolina how is the mission of CCA bringing change to the charter schools within North Carolina? - walter_finnigan</p> <p><u>Mission Statement</u> Explanation of mission is the mission stated again. Explain how students will be prepared to be engaged, active citizens who express good character. - sherryreeves</p> <p><u>Mission Statement</u> What evidence do you have that parents want and will enroll their children? - tammisutton1974</p> <p><u>Educational Need and Targeted Student Population</u></p>
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***The applicant needs to clarify the "character traits of students who will excel at CCA-CFA." If a student does not possess the traits, is the applicant going to encourage him or her not to apply to the school?

***The parent survey does not provide useful information that helps to determine educational need. The applicant needs to clarify how it has determined that there is a need for this school in Fuquay-Varina besides the fact that there are no other charter schools in Fuquay-Varina. - kwilliams75

Educational Need and Targeted Student Population

How do you know that students will be willing to attend? There is no evidence in the appendices that of the more than 200 surveyed that anyone would be interested in your school. - jengnann

Educational Need and Targeted Student Population

Please clarify how evidence represents that individual would choose your school if given the option.

Educational needs are not specific enough. - jessica_kelly

Educational Need and Targeted Student Population

There is not a clear need for a charter school in this area. Survey results show interest but no direct indication that the child would enroll.

The applicant list characteristics for the students they are looking for. What if a student/family doesn't possess these traits, will they be encouraged not to apply? - shannon1974

Educational Need and Targeted Student Population

Outside of the financial support from CFA what is the educational need for the school to be located in Fuquay -Varina? The data provided indicated 210 responses to survey that's less than half of the anticipated population of the school. How will the applicant meet the projected enrollment of the charter school if there is no interest in the mission school? - walter_finnigan

Educational Need and Targeted Student Population

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: <http://www.dpi.state.nc.us/charterschools/schools/map>. - dtsmith840

Educational Need and Targeted Student Population

With a classical education program it is certainly different than the LEA. Also, I believe this will be the only charter school in Fuquay-Varina if approved. - dswalker

Educational Need and Targeted Student Population

Applicant states that targeted population will reflect Wake Co. (51% white, 24% black) but town of Fuquay-Varina is 72% white.

Survey had 210 responses. Only 171 of the respondents stated they would have students in the K-6 grade range for 2018-19. Why not ask a question about respondent's likelihood of enrolling student in CCA? The enrollment number and grade span for year 1 is large. - sherryreeves

Purposes of Proposed Charter School

***What data does the applicant have to represent all of the studies mentioned in its explanation?

***The applicant may have spread its explanation too thin by trying to address all 6

	<p>legislated purposes. Which one or two legislated purposes most align with what the applicant hopes to accomplish if allowed to open this school? Provide specific details regarding how the applicant will achieve those one or two purposes. - kwilliams75</p> <p><u>Purposes of Proposed Charter School</u> Are there benefits to core knowledge for students who are not low income students? - walter_finnigan</p> <p><u>Goals for the Proposed Charter School</u> I have concerns about the statement "a majority of the board are non-related parties." A board without conflicts of interest is a board that has NO related parties - jengnann</p> <p><u>Goals for the Proposed Charter School</u> ***The applicant needs to clarify goal #2. Is 75% proficient as high as the applicant thinks the school can achieve? ***How often and by what methods will the board monitor its operations goals? ***How will the board monitor the achievement of the second part of the mission: "...engaged, active citizens and building students of good character through community outreach and development?" - kwilliams75</p> <p><u>Goals for the Proposed Charter School</u> With having the majority of the board as non-related parties will their be investment from the board for the school? - jessica_kelly</p> <p><u>Goals for the Proposed Charter School</u> 75% proficiency seems low for mission stated. There is no specific timeline for this goal to be met. How will the board measure the last part of the mission regarding "character through community outreach and involvement?" - shannon1974</p> <p><u>Goals for the Proposed Charter School</u> Who will provide the board training and when will the board training be given? - walter_finnigan</p> <p><u>Goals for the Proposed Charter School</u> Reasonable goals. - dswalker</p> <p><u>Goals for the Proposed Charter School</u> What is the Core Knowledge Foundation? Why is Team CFA Academic Committee providing the report to the board regarding MAP data? - sherryreeves</p> <p><u>Goals for the Proposed Charter School</u> On what assessment is this goal referring? "Students will meet or exceed growth a minimum of 4 out of the 5 years." Is this state testing or MAP? MAP is referenced below in how they will measure the goals, but what about state testing. In addition, what percent of students will meet or exceed growth? This goal is unclear.</p> <p>In what year of the school is this goal referring: "75% of students will be proficient on state administered math, science and reading tests." Will their be improved proficiency over time? What increases are expected?</p> <p>- tammisutton1974</p>
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Carolina Charter Academy - A CFA - The mission of Carolina Charter Academy is to provide a classical education to elementary and middle school students while preparing them to be engaged, active citizens and building students of good character through community outreach and involvement.

<p>Education Plan</p>	<p><u>Instructional Program</u> ***What is the documented evidence that the proposed approach will lead to improved student performance for the school's target population? - kwilliams75</p> <p><u>Instructional Program</u> Clarification is needed on the approach the application hopes to mirror from Thomas Jefferson Classical. - shannon1974</p> <p><u>Instructional Program</u> I am a strong believer in the strength of the classical education program and I am also a strong believer in the use of personal electronic devices to aid in learning (one-to-one devices). - dswalker</p> <p><u>Instructional Program</u> What evidence do you have that this approach works for all children - especially those who are at risk? - tammisutton1974</p> <p><u>Curriculum and Instructional Design</u> I'm concerned with the lack of planning days for the teachers. Looking at the calendar, 4 half days throughout the year isn't much. - jengnann</p> <p><u>Curriculum and Instructional Design</u> How was it decided that Core Knowledge and Singapore Math would be the two main curriculum's for your school? Who was involved in this decision making process.</p> <p>The calendar does not support teacher professional development. Only 4 days are indicated during the school year for teacher workday's and these are on early release days. Please clarify how the teacher workday's and professional development are going to be acquired. - jessica_kelly</p> <p><u>Curriculum and Instructional Design</u> ***What is the basic learning environment planned for students in grades 6-8? ***What are the primary instructional strategies used at Thomas Jefferson Classical Academy that the applicant is hoping to mirror? What strategies have been successful in the elementary grades? What strategies have been successful in the middle school grades? ***The demographics of Thomas Jefferson Classical Academy (TJCA) do not match the proposed demographics of the applicant's school. Further, in 2015-16, only 39.6% of African American students and 53.5% of Hispanic students were proficient on the EOG tests at the College and Career Level at TJCA , while 80.5% of White students were. In this regard, what evidence can the applicant provide that this model works for ALL kids? ***The school calendar does not observe the Veteran's Day holiday on November 12, 2018. - kwilliams75</p> <p><u>Curriculum and Instructional Design</u> What will grades 6-8 look like as far class size, learning environment, etc? There is not a lot of time set aside for professional development for teachers as mentioned in the narrative. - shannon1974</p> <p><u>Curriculum and Instructional Design</u> The applicant does not state whether it will operate by number of school days per year or hours. The curriculum framework in appendix B does not clearly support the mission of the school as it is not aligned with the North Carolina accountability model. Appendix B is just a basic course listing. Does not outline the curriculum for one year. - walter_finnigan</p>
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<p><u>Curriculum and Instructional Design</u> How many calendar days/instructional hours for the AY? - sherryreeves</p> <p><u>Curriculum and Instructional Design</u> Scope and Sequence is not very detailed. - a_quigley</p> <p><u>Curriculum and Instructional Design</u> More evidence needed to show how this model will support students who are behind in grade level. - tammisutton1974</p> <p><u>Special Programs and "At-Risk" Students</u> ***What methods and systems of prevention will teachers use to provide assistance to students that are not performing at expected levels? ***How will small group instruction be organized in a way to ensure continued progress and academic student growth? ***If an ELL student requires intensive services beyond what a classroom teacher can provide, how will the applicant meet the student's needs? ***What are the 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? - kwilliams75</p> <p><u>Special Programs and "At-Risk" Students</u> Explain further your intervention plan. How will students that are at-risk be identified, how will they be supported? What plan is in place for them.</p> <p>There is no mention of the Home Language Survey.</p> <p>Why aren't the parents involved in the ELL process? "Parents are notified"? Explain more about the ELL program</p> <p>How will you ensure that students are receiving the proper AIG instruction if it is supposed to be "integrated"? Is there an AIG teacher? - jengnann</p> <p><u>Special Programs and "At-Risk" Students</u> What process will be used to identify at risk students? Will the school be following RTI/MTSS model of intervention?</p> <p>What resources will be provided to the student and parent of an ELL student? - jessica_kelly</p> <p><u>Special Programs and "At-Risk" Students</u> How will "At-Risk" students be identified? Will you be using RTI? Who will be leading the small groups for "at-risk" students? What if these groups don't help the student? The plan for "At Risk" students is vague and should be expanded. There is no mention of the Home Language Survey to help identify ELL students. The applicant should review the regulations and testing around ELL students. There is a test that is administered yearly to ELL students to determine services and eligibility that is not mentioned. What will you do with ELL students that need extra support outside of the regular ed classroom?</p> <p>- shannon1974</p> <p><u>Special Programs and "At-Risk" Students</u> The applicant needs to clearly define an ELL program.</p>

The applicant states they will be identifying academically gifted students therefore they must submit an academically gifted program to the Department of Public instruction.
- walter_finnigan

Special Programs and "At-Risk" Students

The explanation for identifying and providing interventions to at-risk students is vague. Applicant also seems to lack understanding of the Exceptional Children's program, as well as EL program.

Concerning that applicant states that AIG monitoring and evaluating will be the same as for all students. Even though classical curriculum works well with this population, how will identified students be served to meet their needs as written in their personalized education plans? - sherryreeves

Special Programs and "At-Risk" Students

This section lacks specific details of intervention. How will this approach bring students who are years behind to grade level:

Intervention:

Through our co-teaching model, the teachers can group students according to ability. The "at risk" student would be placed in a small group and would have the benefit of small group instruction. After school activities such as tutoring/homework helpers will be available after school. Progress reports and report cards will allow teachers to monitor growth.

More details are needed for the ELL plan. - tammisutton1974

Exceptional Children – Identification and Records

I'm concerned that an Administrative Assistant, who typically do not have a background in education, will be responsible for "checking records for IEPs or 504s". How will the principal and the EC staff ensure that this is done with fidelity and that every student is properly served?

Putting up posters about ChildFind isn't enough to identify children with disabilities. How will the school be using ChildFind?

What interventions will be in place if the parent does not give consent for the child to be presented to the SST? How will the child's needs be met even if they are not entered into the EC program?

Who will be conducting the evaluations?

Explain your 504 process further. I'm concerned about the principal monitoring those plans. Who is responsible for writing them and putting those plans in place? - jengnann

Exceptional Children – Identification and Records

What is your process for Child Find? This would include teacher and parent referral. The process is not started with testing. It appears that the identification and referral process is out of sequence. Please note: The 90 day timeline begins once a referral is received not the date of the DEC 1 meeting. - kevin_allen

Exceptional Children – Identification and Records

Will an EC teacher/director be involved in the process of acquiring 504s and IEPs?

	<p>Why is your head of school monitoring 504s? Will this also be the person who is monitoring mods are being met? Will this person also be conducting all 504 meetings? - jessica_kelly</p> <p><u>Exceptional Children – Identification and Records</u> 504 plans are different from exceptional children and typically do not fall under the exceptional teacher's responsibility as mentioned in the application. Placing posters and Brochures around the school is not sufficient for child find. Applicant should review its referral plan to ensure it is meeting the 90 day time line that begins at request not DEC 1 meeting. - shannon1974</p> <p><u>Exceptional Children – Identification and Records</u> The applicant needs to contact the school in which the child is transferred from to make a records request , specifically asking if the student has a 504/ELL or EC services - walter_finnigan</p> <p><u>Exceptional Children – Education Programming</u> Explain further the educational program, strategies, and the supports available to students in the EC program. - jengnann</p> <p><u>Exceptional Children – Education Programming</u> The process for identifying and testing EC students needs to be clarified. There is not enough information about the intervention process that will occur prior to testing for EC. - jessica_kelly</p> <p><u>Exceptional Children – Education Programming</u> ***To what degree has the applicant planned for the need of a self-contained classroom? - kwilliams75</p> <p><u>Exceptional Children – Education Programming</u> What if a student comes in with an IEP requiring self-contained classrooms? - shannon1974</p> <p><u>Exceptional Children – Education Programming</u> More details are needed to explain how 504 plans will be created. - tammisutton1974</p> <p><u>Student Performance Standards</u> 100% meeting RIT growth annually. Does that include your special populations? explain the statement "provide them with the necessary support to achieve this."</p> <p>Who is on the retention/promotion committee? Do they have the final say in the retention/promotion of students?</p> <p>What are the exit standards for 8th graders?</p> <p>How does assessment drive instruction? - jengnann</p> <p><u>Student Performance Standards</u> It is concerning that the narrative states all students with disabilities will take alternate assessments. It should be based on individual student need. - kevin_allen</p> <p><u>Student Performance Standards</u></p>
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	<p>How will the school assure that as students exit they are fully prepared for high school?</p> <p>Is there any type of committee for promotion/retention or is it based on criteria alone? Who will be making the final decision about retention? - jessica_kelly</p> <p><u>Student Performance Standards</u> ***What are the school's exit standards for 8th grade students? What should these students know and be able to do by the time they are exiting the school? Are the exit standards for at-risk students the same or different as for non-at-risk students? - kwilliams75</p> <p><u>Student Performance Standards</u> Goals are not time specific. Not all students requiring an IEP will require alternative assessments as stated in your application.- "Students with disabilities, as identified by Individualized Education Plans (IEPs) will be given alternative assessments." Promotion/retention policy needs clarification. Are promotion and retention based solely on test scores? What about classroom performance? Who is on the committee? What exit standards are there for 8th graders? How will test scores drive instruction to improve over-all student performance? - shannon1974</p> <p><u>Student Performance Standards</u> Promotion standards are not clear. - sherryreeves</p> <p><u>Student Conduct and Discipline</u> Explain "time out".</p> <p>A discussion of students with special needs is missing from this section. I believe it was placed in the previous section by error.</p> <p>How will teachers and families be made aware of these policies? How will you ensure that each teacher institutes these policies in the same manner? - jengnann</p> <p><u>Student Conduct and Discipline</u> There is nothing mentioned regarding discipline of students with disabilities. Refer to "Policies Governing Services for Children with Disabilities" when developing your plan. - kevin_allen</p> <p><u>Student Conduct and Discipline</u> No information about student conduct for students with disabilities.</p> <p>Who will determine what level of discipline a student is on?</p> <p>Is there a process in place for a student who has multiple offenses throughout the year? If so this process is not clear. A grievance process is not indicated either. - jessica_kelly</p> <p><u>Student Conduct and Discipline</u> ***What is the applicant's definition of "administrative review and reassignment?" ***How will the school take into account the rights of students with disabilities in regards to actions that may lead to suspension or expulsion? ***What are students' due process rights when suspended or expelled? - kwilliams75</p> <p><u>Student Conduct and Discipline</u></p>
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	<p>There is no mention of due process for students when discussion of suspension. How will discipline for students with disabilities be handled? Who determines what level a student is on regarding discipline? - shannon1974</p> <p><u>Student Conduct and Discipline</u> Need more information that board understands due process rights of students for long-term suspensions/expulsions. - dswalker</p> <p><u>Student Conduct and Discipline</u> Suspension information for EC students was given in previous section. - sherryreeves</p>
<p>Governance and Capacity</p>	<p><u>Private Non-Profit Corporation</u> No federal tax ID number listed. - jessica_kelly</p> <p><u>Private Non-Profit Corporation</u> ***The applicant did not include the Federal Tax ID Number. - kwilliams75</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> No 501 (c)(3) so applicant has 24 months. - jessica_kelly</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> ***The applicant has 24 months after approval to obtain tax- exempt status. - kwilliams75</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> Applicant has 24 months to apply after approval. - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> ***The board does not appear to have any expertise in the areas of real estate, marketing, or elementary education. How will the board address these areas of need? ***There are 5 board members currently on the board. The board intends to add a board member with expertise in legal matters (i.e., an attorney) and a board member with expertise with fundraising. If the board also adds a TeamCFA board representative, that will bring the number to 8. How will the board handle this as it conflicts with the board's stated maximum of 7 board members? ***The applicant has not provided an adequate plan for orientation of new board members and ongoing professional development of existing board members. Specifically, what is the timetable and requirement for participation? ***Are there any existing relationships that could pose an actual or perceived conflict of interest, such as the married couple serving on the board? ***The applicant needs to clarify the bylaws: Article IX, Section 6. Under what circumstances will voting members of the board receive compensation from the corporation? ***Article V, Section 6 of the bylaws is not allowed. Charter school board of directors cannot take action without a meeting. ***What will be the board's relationship with and interaction with the Parent Action Committee? ***What is the criteria for the evaluation of the governing board, board members, the lead administrator, and TeamCFA? ***The applicant did not provide a criminal background check for Kellie Nothstine. - kwilliams75</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> It is concerning that related parties are members of the board. While they are not the</p>

	<p>majority, it does give the appearance of conflict of interest.</p> <p>Discuss further the role of parents on the Teacher Advisory Committee. That doesn't seem to fit.</p> <p>Explain the discrepancy in your by-laws and narrative about when the annual meeting will be held. How will the board be evaluated?</p> <p>Explain how, in the org chart, the TAC is separate from the faculty?</p> <p>What circumstances would allow a board member to be compensated as listed in your bylaws?</p> <p>What is the difference between the PAC and the PTO?</p> <p>Where does the Instructional Coach provided by Team CFA fit in the org. Chart?</p> <p>Articles of Incorporation are missing.</p> <p>Article V Section 6 of the by-laws are in violation of Open Meeting Laws. No action can be taken while not in a public open session. - jengnann</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Missing board resumes for two of the members.</p> <p>Board is missing members who several areas of expertise that will be needed to open a successful school.</p> <p>Bi-laws need to be revised...Article V, Section 6 - open meeting laws.</p> <p>Conflict of interest between board members possible with current members listed. - jessica_kelly</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> With only 5 board members and 2 that seemed to be relater, could there be a conflict of interest? The applicant states the board will consist of 5 to 7 members. Currently there are 5 members but in the narrative it is suggested the possibility of adding 3 additional board members that would contradict its bylaws. What is the difference between the PAC and the PTO? How do the two interact with the Board? How will be the board be evaluated? How will the administrator be evaluated? The By-laws and the narrative contradict when the annual meeting will be held. Will it be in May or July? Action cannot be taken by board without a meeting. All actions must be voted on by the Board in Open Session. The By-laws give the board the right to take action without a meeting. How does a voting member receive compensation? - shannon1974</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Bylaws state that board will meet quarterly.</p>
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Organizational chart is confusing. Is BOD directly supervising teachers, staff and parent committees? - sherryreeves

Governance and Organizational Structure of Private Nonprofit Organization

Two resumes are missing for board members.

What about the possible perceptions of conflict?

- tammisutton1974

Proposed Management Organization (EMO/CMO)

***This section is not applicable. - kwilliams75

Proposed Management Organization (EMO/CMO)

Does not plan to have an EMO - shannon1974

Staffing Plans, Hiring, and Management

Will there be a direct line of interaction between the board and the teachers? Expand upon the relationship between the staff and the board.

- jengnann

Staffing Plans, Hiring, and Management

How will you retain teachers with only indicating competitive salaries? Will this be based on the state pay scale schedule? Are you starting all teachers, regardless of years of experience and education at \$42,000/year?

More details are needed on benefits and retirement system plan.

Head of School description does not indicated monitoring of 504s as indicated earlier in application.

Clear explanation of the relationship between the school employees and board not given. - jessica_kelly

Staffing Plans, Hiring, and Management

***Will it be a requirement of the hiring process for teacher assistants to have a CDL and be willing to drive a bus?

***Other than the school employees being employees of the board, are there any other facets of the relationship between the board and school employees?

***What are the board's procedures for dismissing school personnel?

***What is the salary range for all levels of employment?

***How long does the board intend to take to act upon a grievance once received?

***What is the school's plan for providing qualified staff for gifted students? -

kwilliams75

Staffing Plans, Hiring, and Management

What relationship will staff have with the board?

What is the dismissal process for staff?

Besides teacher salary range, what is the range for all other employees? - shannon1974

Staffing Plans, Hiring, and Management

How does board intend to attract highly qualified teachers with experience in classical education?

Will 10 days of professional development in Core Knowledge and Singapore Math (plus project-based learning) right before school starts be sufficient to effectively train teachers

	<p>in a rigorous curriculum? Narrative states earlier that there will be 2 transportation routes but staffing only includes 1 part-time bus driver. No counselor/social worker listed. Narrative states that CCA will not participate in the state health plan or the state retirement plan. Later it states that there will be health benefits and retirement options. Please clarify. Will board offer a supplement to its teachers like Wake County? - sherryreeves</p> <p><u>Staff Evaluation and Professional Development</u> ***The school calendar does not clearly indicate when teacher workdays and/or early release days will be devoted to professional development, therefore the evaluator cannot make a determination on whether all school staff will receive ongoing focused professional development to effectively implement the school's mission, instructional methodologies, and the education program. - kwilliams75</p> <p><u>Staff Evaluation and Professional Development</u> Explain further how the professional development mentioned in the narrative is illustrated in the calendar as presented in Appendix C. It appears that during the school year, only 4 1/2 days will be provided. - jengnann</p> <p><u>Staff Evaluation and Professional Development</u> Professional development days on school calendar are not adequate. Cramming in two new curriculum's in 10 days does not indicate that teachers will be fully prepared. How does this align with the proposed budget? - jessica_kelly</p> <p><u>Staff Evaluation and Professional Development</u> How does the Professional Development align with the school calendar presented earlier in the application? Will 14 workdays be enough to fully train teachers new to the curriculum and processes you plan to deliver the first year? - shannon1974</p> <p><u>Staff Evaluation and Professional Development</u> See note in earlier section regarding professional development. - sherryreeves</p> <p><u>Staff Evaluation and Professional Development</u> Why are there only 4 days for professional development? When will teachers learn all of the specific curriculum? - tammisutton1974</p> <p><u>Marketing Plan</u> How does this align with proposed marketing budget? - jessica_kelly</p> <p><u>Marketing Plan</u> How will you market to a wide range of families - especially those who do not have access to technology and social media? - tammisutton1974</p> <p><u>Parent and Community Involvement</u> How does the SAC differ from the PAC and the TAC mentioned in governance section? - jengnann</p> <p><u>Parent and Community Involvement</u> How is SAC different that the other two organizations mentioned earlier, PAC and TAC? -</p>
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	<p>jessica_kelly</p> <p><u>Parent and Community Involvement</u> There is not mention of the PAC or the PTO in this section as mentioned previously. However, there is mention of the SAC. What is the SAC? Will there not be a PAC or PTO? How will you hold parents accountable for the 5 hours of volunteering? What if they don't fulfill this request? - shannon1974</p> <p><u>Parent and Community Involvement</u> ***What is the consequence if parents do not volunteer the minimum of 5 hours per year? ***The applicant's response implies that there is some question as to whether a Parent Action Committee (PAC) will be formed, yet that committee is part of the school's organization chart. Will there definitely be a Parent Action Committee? ***The applicant mentions a School Advisory Council (SAC) in this part of the application and a Teacher Advisory Council (TAC)in another part of the application. Will the school have a PAC, SAC, and a TAC? If so, what will be the relationship between each of these groups and the board? - kwilliams75</p> <p><u>Parent and Community Involvement</u> What will you do if parents do not volunteer for at least 5 hours? - tammisutton1974</p> <p><u>Projected Student Enrollment (Table)</u> Explain the variance in the home LEA of origin for students from one year to the next. - jengnann</p> <p><u>Projected Student Enrollment (Table)</u> Explain the variance in enrollment by grade. - sherryreeves</p> <p><u>Weighted Lottery</u> No weighted lottery. - jessica_kelly</p> <p><u>Weighted Lottery</u> Does not apply to this application. - shannon1974</p> <p><u>Weighted Lottery</u> ***This section is not applicable. - kwilliams75</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Explain further y our plan. How will transportation be provided? How will you budget for this? - jengnann</p> <p><u>Transportation Plan</u> Transportation plan is not detailed enough. How will this be budgeted for? If only 1/4 students are expected to ride first year how will the other 3/4 of students be arriving and dismissing from school. What is the plan for students who cannot provide transportation? Earlier it was indicated that there would be one bus driver. How will this be implemented in the transportation plan if multiple students need to be picked up and dropped off in various areas? - jessica_kelly</p> <p><u>Transportation Plan</u> How will pick up and drop off locations be determined? How will you ensure that all students will be able to get to the drop-off/pick-up locations? This plan needs to be expanded as it is vague. - shannon1974</p> <p><u>Transportation Plan</u></p>

The applicant budgeted \$22,000 for fuel \$15,000 to purchase two buses along with additional money for oil and tires. The applicant only budgeted one position for a bus driver. If the school anticipates providing transportation for one quarter of the student population they will need two buses, how are they going to provide this service? - walter_finnigan

Transportation Plan
***How will drop-off and pick-up locations be determined?
***What adjustments will be made to the plan if students are unable to get to the drop-off and pick-up locations?
***Is the applicant prepared to increase its budget and drop-off/pick-up locations if more students need bus transportation than originally estimated? - kwilliams75

Transportation Plan
Will these be busses? How many drop-off/pick-up locations do you anticipate? - dswalker

Transportation Plan
Transportation plan lacks details.
Applicant states that an anticipated 25% of first year enrollment will need transportation. This equates to 93 students. This will require at least 2 buses. - sherryreeves

Transportation Plan
How will you determine drop off and pick up locations? What if a student cannot get to those locations? - tammisutton1974

School Lunch Plan
***The applicant needs to clarify its lunch plan by including more detail about how students who would qualify for free and reduced price lunch will be identified and have a lunch provided by the school.
***With the calculation provided, is the applicant only expecting 10% of its students to qualify for free or reduced price lunch? - kwilliams75

School Lunch Plan
Explain this plan further. Details are missing. - jengnann

School Lunch Plan
Lunch plan is lacking details. How will it be determined if a student qualifies for free/reduced lunch? Who is contacting parents about lunch affordability? - jessica_kelly

School Lunch Plan
What happens to a student that cannot afford to bring his/her lunch from home?
How do you determine who is eligible for free/reduced lunch?
Who will contact parents about students repeatedly not coming to school with lunch?
This plan lacks details and should be expanded. - shannon1974

School Lunch Plan
I'm confused about this... If Wake County is 33% F/R Lunch, why plan for 10%. Also, what are the schools qualifications for a F/R lunch if the school is not participating in the NSLP? - dswalker

School Lunch Plan
Will there be provisions for students who qualify for free or reduced lunch? Can you ensure that this will not be a barrier to a student who desires to attend CCA? - sherryreeves

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	<p><u>School Lunch Plan</u> This doesn't match with the 33% ratio of FRL in the projected student population. - a_quigley</p> <p><u>School Lunch Plan</u> Do you expect only 10% of your students to qualify for free or reduced lunches? What if you have more? - tammisutton1974</p> <p><u>Civil Liability and Insurance</u> You state that you will be providing transportation, yet you don't intend to carry Motor Vehicle insurance? It's also unclear why there is no quote on insuring a school building? Is that a part of your lease? - jengnann</p> <p><u>Civil Liability and Insurance</u> Why is motor vehicle liability at a cost of \$0? Are you not planning on carrying? How is this possible if you are providing transportation? - jessica_kelly</p> <p><u>Civil Liability and Insurance</u> How will you not have transportation liability? There is no charge for this on the quote. - shannon1974</p> <p><u>Healthy and Safety Requirements</u> Not signed by a person - jengnann</p> <p><u>Healthy and Safety Requirements</u> Not signed by board chair. - jessica_kelly</p> <p><u>Healthy and Safety Requirements</u> Was this statement signed by the board chair? - sherryreeves</p>
<p>Financial Plan</p>	<p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> No appendix M. - jessica_kelly</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> There is no working capital for the first 5 years. - shannon1974</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Will there be "other funds" provided by Team CFA? Application mentions funding from Team CFA several times earlier. - sherryreeves</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> I did not see Appendix M. There is no working capital for the first 5 years. - tammisutton1974</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Admin salaries are high based on the number of students. - jengnann</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Administration salaries are high based on student population.</p> <p>It is very concerning there is no financial officer.</p> <p>Number of staff and number of benefits do not match. - jessica_kelly</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u></p>

<p>Why don't the benefits match the number of employees? Why is there no financial officer? Who will handle the finances? - shannon1974</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> ***Which employee from the Administrative and Support Personnel is not getting benefits? Why is that employee the only one of 34 not getting benefits? If this was a clerical error, the budget is off by \$7045 in year one and additional amounts in subsequent years. - kwilliams75</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Would like to hear more about the health care plan. Seems a little on the low side. - dswalker</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> \$0 budgeted for finance officer (contract?) and food service (will there be a cafeteria area?); no counselor, social worker, nurse. Only 1 transportation staff but based on narrative there will be a need for at least 2 buses. - sherryreeves</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> The salary for the starting leader is high. There is no financial officer. Where there be one or two bus routes and bus drivers? - tammisutton1974</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Office supply line item is very low for the first year.</p> <p>Seems unreasonable to have only one custodian without any contracted support.</p> <p>\$95,000 in other facilities? What is included? What is included in the \$75,000 "Other Professional contract?" - jengnann</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Are their funds budgeted for contracted related services such as OT, PT, Speech, and Psychological Services? - kevin_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> No money budgeted for contract services such as PT or OT; is this accurate?</p> <p>What is other professional budgeted \$75,000? What does this include? - jessica_kelly</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What constitutes "Other Professionals?" Is this contract people for exceptional children? - shannon1974</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> ***The applicant needs to clarify the "Other" line item in the instructional operations budget. - kwilliams75</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> What are the "Other Professional" costs listed under Professional Contract? Budgeted amounts in year 1 are \$75,000 and increase to \$195,000 by year 5. Explain \$95,000 "Other" under facilities in year 1. Are the amounts given for buses for the purchase of buses? No allotment for years 3 and</p>

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	<p>5. Child nutrition is very low. Explain anticipated costs under "Travel"/Other, Explain the \$211,500 listed under "Other"/Books and Supplies year 4. - sherryreeves</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Number of bus routes/drivers? - tammisutton1974</p> <p><u>Budget Narrative</u> Is the projection to purchase two buses for \$15,000 total and only spend \$22,000 on gas? How were these numbers arrived at?</p> <p>The transportation narrative talks about two buses, yet only one transportation salary is budgeted for and transportation insurance is not included in the quote. - jengnann</p> <p><u>Budget Narrative</u> Transportation is indicated two buses but only one driver - is this accurate?</p> <p>Student to teacher ratio is conflicting from earlier in the application.</p> <p>- jessica_kelly</p> <p><u>Budget Narrative</u> Classroom ratios conflict from earlier in the application. What is the correct ratio? Is \$15,000 enough for 2 buses? - shannon1974</p> <p><u>Budget Narrative</u> ***The application contains conflicting information. In one section, it says that the student to teacher ratio will be 22:1 in K-2 and 25:1 in 3-8. Here it says 22:1 for K-5 and 25:1 in 6-8. Which is correct? ***What is the financial benefit of leasing Chromebooks vs. purchasing them? ***The board has not yet developed policies governing the selection of contractors and large purchases. ***How will the school develop the fund balance? - kwilliams75</p> <p><u>Budget Narrative</u> Break-even is 321 students. - sherryreeves</p> <p><u>Financial Audits</u> Expand upon the auditing process. - jengnann</p> <p><u>Financial Audits</u> Who will be in charge of preparing for the audit with no financial officer overseeing? - jessica_kelly</p>
OVERALL	

Charter School Advisory Board Subcommittee	
Mission,	Mr. Walker led the interview and the CSAB outlined specific questions/concerns it wanted

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<p>Purposes, and Goals</p>	<p>the group to respond to during the interview. Specifically, the board of directors organizational chart, its conflict of interest, school calendar, and the purposes for the charter school.</p> <p>Ms. Parler asked a direct questions about how the board worked to determine the purposes outlined in the application. Ms. Stoops (proposed board member) outlined the board visited several schools and how the chosen purposes aligned to its chosen curriculum and best practices in education.</p> <p>Ms. Sutton asked wanted information on how the proposed applicant would meet the needs of its "at-risk" population. Dr. Stoops responded that the recruiting would focus on a 3-county radius and it would be difficult to determine the specific student make up the school would ultimately serve. Ms. Stoops communicated to the CSAB the marketing efforts the proposed board had made to target and recruit students from the at risk population. Ms. Sutton asked additional questions about the lack of diversity on the board and its impact on recruiting students from a diverse population. Another proposed board member outlined the ties the board had to the community and the outreach completed into various areas. Also, the proposed board of directors communicated they had done a lot of work to diversify the board and student population.</p>
<p>Education Plan</p>	<p>Ms. Stoops outlined the school proposed to adopt the hour requirements with its school calendar instead of the days. Specifically the school would conclude the school year with 186 x 7 hours 6 hours 15 min per day of instructional time excluding lunch.</p> <p>Ms. Reeves asked about the promotion criteria from year to year benchmark testing, proficiency on EOG and the promotion standard with intervention if a student did not perform well on End of Grade (EOG) testing. Dr. Stoops outlined that the school would also utilize the NC check-ins to help determine promotion from one year to the next. While this was not included in the plan, the school plans to take advantage of this opportunity. The school also plans to use MAP testing to assess students throughout the year.</p> <p>Ms. Parler wanted specific information on how the school would handle discipline regarding its Exceptional Children (EC). One board member responded there would be an intervention plan to determine the appropriateness for EC students. Another board member enforced positive reinforcement would be his recommendation and the positive reinforcement would be pushed based on his experience with students in charter schools.</p>
<p>Governance and Capacity</p>	<p>Ms. Reeves questioned at what point Mr. Stoops would resign from the board. Dr. Stoops responded he would resign after approval and would hopefully be replaced with a parent representative as the board continued its work to diversify the board. Dr. Stoop also clarified who would report to the administrator of the school and the boards responsibility to hire/fire employees.</p> <p>The proposed board planned to participate in the NC state health plan but not the NC state retirement system. Dr. Stoops informed the CSAB that the figure quoted by Mr. Walker was an error on their part and that they would be adjusting the figures.</p>
<p>Operations</p>	<p>Ms. Reeves questioned the transportation plan and the budgeted amount and to which a proposed board member responded that transportation would not be a barrier. Additionally, Dr. Stoops communicated the specific budgeted amount for the proposed transportation plan and detailed that additional stops and buses may be added should need dictate. Ms. Reeves questioned how the lunch program would accommodate for students</p>

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	who may need lunch. Dr. Stoops outlined they would shift budgeted staffing salaries and would use a lunch program and fundraising opportunities to help ensure that no student is denied a lunch.
Financial Plan	
OVERALL	Mr. Hawkes made a motion to move the school forward as the board was strong with a good application. Ms. Gibbs seconded the motion. Ms. Reeves communicated that the purpose of this interview process was to make the applicant group aware that items needed to be tweaked as they go through the Ready to Open process as some areas were not as flushed out as they should have been. Mr. Walker echoed the sentiments of Mr. Hawkes that the board was strong and the group would have the support of Team CFA. Mr. Maimone and Mr. Helton recused. The motion passed unanimously.

Overall Summary	
Initial Screening 09/30/2016	<p>The Office of Charter Schools deemed this application incomplete on September 30, 2015. The following information is needed for the evaluation of this application:</p> <ul style="list-style-type: none"> (1) Applicant has 24 months after approval to obtain tax exempt status (2) One page resumes are missing for 2 of the 5 board members. Resumes are needed for Stephanie Nall and Terry Stoops (3) The Articles of Incorporation from the Secretary of State's Office is missing and is required in order to apply per NC GS 115C-218.1. <p>Applicant responded to the incomplete submission request on October 5, 2016.</p>
Application Review	<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. 5 board members and 1 member from CFA were present for the clarification opportunity.</p> <p>Mr. Quigley led the discussion and members of the Policy Committee asked specific questions on items needing clarification. One member of the proposed board outlined the reasons 3 new board members were added. Specifically, the new members were added to strengthen the board based on the comments outlined in the application evaluation rubric. Mr. Stoops, member of the board, outlined he had a resignation letter ready to eliminate the conflict of interest currently on the board. Mr. Quigley questioned the role of CFA and if Mr. Sinderson would be the CFA board member on the board. A member of the proposed school outlined the reason the board choose to partner with CFA and that they would determine, at a later date, the team CFA board representative. Additionally, the board member outlined the CFA schools visited which are currently operating in NC.</p> <p>Mr. Walker asked questions on the CFA agreement/relationship and its responsibility regarding hiring etc. The board member presenting outlined she may be the school leader and will resign from the board should the proposed board choose to hire her as the leader. Ms. Reeves communicated the discrepancies between the bylaws and the narrative of the application. Mr. Walker addressed the proposed board and asked which was correct based on the questions posed by Ms. Reeves. The proposed board member outlined they have</p>

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	<p>made adjustments. Ms. Reeves communicated she felt it was a pretty good application and during interview the CSAB could drill other questions.</p> <p>Mr. Quigley asked specific questions on the lunch plan outlined in the application. Mr. Stoop outlined that the plan was to budget monies and have other areas subsidize if a student cannot afford lunch. Mr. Walker provided the Policy Committee his understanding of the requirements of charter schools providing lunch and there may need to be another way for the board to consider meeting this component of the plan. Ms. Reeves asked questions about the organizational chart outlined in the application. One proposed member, explained the role of the board and the employees.</p> <p>Ms. Reeves asked questions on the line item books/supplies in year four of the budget. The proposed board member outlined the specific line item was to help build the library of Core Knowledge resources. Additionally, Ms. Reeves sought clarification on the contracted services outlined and the board member responded that it was to provide a padding to help accommodate for the needs of all students.</p> <p>Mr. Walker made a committee motion to invite Carolina Charter Academy for interview. Ms. Reeves seconded. The motion passed unanimously with Mr. Helton recusing.</p> <p>Mr. Quigley made a motion to the full CSAB to recommend and interview for Carolina Charter Academy. Ms. Parl seconded. The CSAB discussed the Team CFA relationship and Ms. Parler questioned the CFA member on the board. The motion passed unanimously with Mr. Helton and Mr. Maimone recusing.</p>
Application Interview	<p>The Office of Charter Schools provided a brief update on the proposed school. 7 proposed board members and 1 Team CFA representative introduced themselves to the CSAB and provided a brief professional history and explained their respective role on the board of directors for Carolina Charter Academy - A CFA.</p>
OVERALL	<p>Mr. Hawkes made a motion to move the school forward. Ms. Gibbs seconded the motion. Ms. Reeves communicated that the purpose of this particular interview was to make the applicant group aware that items needed to be tweaked as they go through the Ready to Open process as some areas were not as flushed out as they should have been. Mr. Walker echoed the sentiments of Mr. Hawkes that the board was strong and the group would have the support of Team CFA. Mr. Maimone and Mr. Helton recused. The motion passed unanimously.</p>