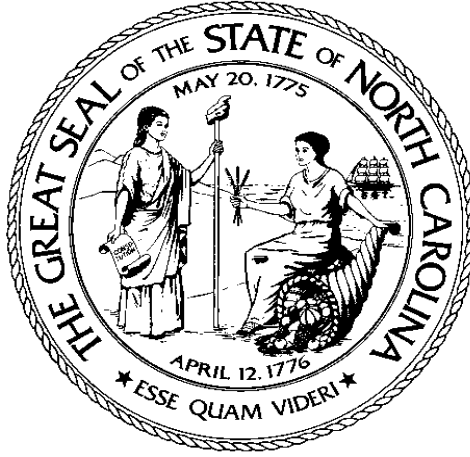


Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.



### 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:

Robert McOuat  
Cande Honeycutt-Killian  
Tammi Sutton  
Nicole Charles  
Steven Walker  
Phyllis Gibbs  
Anthony Helton  
Glenn Allen  
Greg Schermbeck  
Kristen Parker  
Sherry Reeves  
Douglas Price  
Deanna Townsend-Smith

#### Date of Review:

09/30/2016

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.



## **NORTH CAROLINA CHARTER SCHOOL APPLICATION**

# **Carolina Experimental School**

**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.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

## TABLE OF CONTENTS

<u>I.</u>	<u>APPLICATION CONTACT INFORMATION</u>	<u>5</u>
	Grade Levels Served and Total Student Enrollment:	6
	Concerns and Additional Questions	8
<u>II.</u>	<u>MISSION and PURPOSES</u>	<u>9</u>
	Mission:	9
	Educational need and Targeted Student Population of the Proposed Charter School:	9
	Purposes of the Proposed Charter School:	11
	Goals for the Proposed Charter School:	13
	Concerns and Additional Questions	17
<u>III.</u>	<u>EDUCATION PLAN</u>	<u>20</u>
	Instructional Program:	20
	Curriculum and Instructional Design:	21
	Special Programs and "At-Risk" Students	26
	Exceptional Children	29
	Student Performance Standards	31
	Student Conduct:	32
	Concerns and Additional Questions	35
<u>IV.</u>	<u>GOVERNANCE and CAPACITY</u>	<u>40</u>
	Governance:	40
	Governance and Organizational Structure of Private Non-Profit Organization:	40
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	46
	Private School Conversions:	46
	Projected Staff:	46
	Staffing Plans, Hiring, and Management	47
	Staff Evaluation and Professional Development	50
	Enrollment and Marketing:	54
	Marketing Plan	54
	Parent and Community Involvement	55
	Admissions Policy	56
	Weighted Lottery	57
	PROJECTED ENROLLMENT	58
	Concerns and Additional Questions	59
<u>V.</u>	<u>OPERATIONS</u>	<u>62</u>
	Transportation Plan:	62
	School Lunch Plan:	62
	Civil Liability and Insurance	62
	Health and Safety Requirements:	63
	Facility:	63
	Facility Contingency Plan:	64
	Concerns and Additional Questions	64
<u>VI.</u>	<u>FINANCIAL PLAN</u>	<u>66</u>
	Budget: Revenue Projections from each LEA 2018-19	66
	Total Budget: Revenue Projections 2018-19 through 2022-2023	67
	Personnel Budget: Expenditure Projections 2018-19 through 2022-2023	68
	Operations Budget: Expenditure Projections	71
	Overall Budget:	73

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<a href="#">Budget Narrative:</a>	<a href="#">73</a>
<a href="#">Financial Compliance:</a>	<a href="#">77</a>
<a href="#">Concerns and Additional Questions</a>	<a href="#">78</a>

[VII.](#)

<a href="#">AGREEMENT PAGE</a>	
<a href="#">Application Fee:</a>	<a href="#">80</a>
<a href="#">Applicant Signature:</a>	<a href="#">80</a>
<a href="#">Total External Evaluator Votes</a>	<a href="#">82</a>
<a href="#">Total Subcommittee Votes</a>	<a href="#">82</a>
<a href="#">CSAB Votes</a>	<a href="#">82</a>
<a href="#">Initial Screening</a>	<a href="#">82</a>
<a href="#">External Evaluator</a>	<a href="#">83</a>
<a href="#">Charter School Advisory Board Subcommittee</a>	<a href="#">100</a>
<a href="#">Overall Summary</a>	<a href="#">100</a>

## I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Carolina Experimental School

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

Name of non-profit organization under which charter will be organized or operated: Carolina Experimental School

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

Name of contact person: Wenyu Bai

Title/Relationship to nonprofit: Board Chair

Mailing address: 4112 Collamer Dr  
Cary NC 27519

Primary telephone: 919-930-9125 Alternative telephone: 919-930-9125

E-Mail address: conwayzhiyin@hotmail.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:

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?

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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? Carolina Experimental School*

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

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

*Projected School Opening: Year 2018 Month August*

*Will this school operate on a year round schedule?*

No:

Yes:

*Proposed Grade Levels Served and Total Student Enrollment (*

*5*

*Years)*

<b>Academic School Year</b>	<b>Grade Levels</b>	<b>Total Projected Student Enrollment</b>
First Year	06,07,08,09	200
Second Year	03,04,05,06,07,08,09,10	400
Third Year	K,01,02,03,04,05,06,07,08,09,10,11	600
Fourth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	650
Fifth Year	K,01,02,03,04,05,06,07,08,09,10,11,12	650

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

*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.*

800school  
*Signature*

Board President  
*Title*

800school  
*Printed Name*

09/19/2016  
*Date*

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<b>Section I: Application Contact Information Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
<u>Are these numbers truly realistic? Could it be documented with evidence that this school would be able to increase its enrollment by 200 students each year (YRS 1-3)?</u>	<u>Douglas Price</u>	<u>Grade Levels</u>
<u>Where is the signature?</u>		
<u>200 students is low for these grades. In addition, there is little support as evidenced in A1 of the demand for this type of school.</u>	<u>Cande Honeycutt-Killian</u>	<u>Grade Levels</u>
<u>Adding a lot of grades in years 2 and 3 and in a somewhat odd manner. I would like to hear more about the rationale behind this decision.</u>	<u>Steven Walker</u>	<u>Grade Levels</u>
<u>50 students per grade level is a rather low student enrollment projection.</u>	<u>Greg Schermbeck</u>	<u>Grade Levels</u>
<u>Are there sufficient families interested in the philosophy of this school so as to reach projected enrollment numbers?</u> <u>Concern: aggressive enrollment/growth pattern in years 1-3.</u>	<u>Sherry Reeves</u>	<u>Grade Levels</u>

<b>Reviewer</b>	<b>Score</b>
<u>Robert McOuat</u>	
<u>Cande Honeycutt-Killian</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Nicole Charles</u>	<u>Pass</u>
<u>Steven Walker</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Anthony Helton</u>	<u>Pass</u>
<u>Glenn Allen</u>	
<u>Greg Schermbeck</u>	<u>Pass</u>
<u>Kristen Parker</u>	<u>Pass</u>
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Douglas Price</u>	<u>Fail</u>
<u>Deanna Townsend-Smith</u>	



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

## **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:*

Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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

CES has double missions: educational reform and maximum individual growth. CES uses other countries' successes to diagnose American education's problems and innovate. It taps into two underutilized resources in American education: time and great books. Students in top performing countries spend the most time on learning. Adding talent development makes students not one-dimensional. Adding great people's guidance gives students purposes and makes them change agents for a better society.

### **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 Experimental School's targeted population is the general student population. Its main focus is on educational reform rather than a particular student population. CES intends to learn from the best educational practices of China, the top performing system in the 2009 and 2012 PISA study. The Chinese and the American educational systems are like two poles of the educational spectrum. This may be a reason why American educators are reluctant to learn from China though the excellence of its K-12 education has been known for years. Transplanting one culture's educational practice to another culture is risky so protecting this young seedling is our top priority. To ensure its initial success, CES needs a "soil" similar to the Chinese culture so it will start in Cary or nearby towns with a large Asian population, whose understanding and support for the school's philosophy of education is crucial for its trans-Pacific survival. CES is open to students of all ethnicity but Chinese and other Asian students may be overrepresented, exceeding Wake County schools' average of 6.5%. Applying China's educational practices in an area with few Asian students is too risky. After having good results from our CES experiment and learning some

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

lessons from this experimental process, we plan to set up a school in southwestern Raleigh, and eventually set up schools in areas with low performing schools such as Durham and eastern Wake. To find ways to raising disadvantaged students' performances is our ultimate goal. We strategically adopt an incrementalist approach to make sure our reform effort will have a better chance of survival and success.

- 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).*

CES's total projected enrollment will be 200 students in the first year. The school will be in full capacity in Year 4 with 650 students. There are about 50 students in each grade level while there are about 12,000 students in each grade level in Wake County schools so the school's ADM is about 0.4% of the LEA.

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

CES will offer basic curriculum the LEA offers. This is the basic skills curriculum. On top of this, the school uses academic and other competitions to recognize and encourage students' talent development. CES will also use the Great Minds program to facilitate students' philosophical and moral development. Students will read great books mostly in their English and Social Studies classes.

Unlike traditional schools which are focused on knowledge and skills, CES makes maximizing students' growth as a top priority. This is achieved by tapping into underutilized resources such as students' spare time and motivation, great people and great books. American teenagers only do about one hour of homework a day but they spend an average of 7 hours and 38 minutes on entertainment media. In contrast, Chinese students spend most their spare time learning. Chinese students outlearn American students by at least three hours a day. During 12 years of education, Chinese students spend at least 13,140 hours more than American students on learning. There is a well-known 10,000-hour rule of talent development. These extra 13,140 hours make an average Chinese student appear to be academically talented. On the 2012 PISA assessment, Shanghai's 8th graders average 613 in math, more than two standard deviation above the world average. Two standard deviation above the mean is often used as a criterion for identifying gifted and talented students. The powerful 10,000-hour rule of talent development basically make most 8th graders in Shanghai academically talented. No matter what prejudice people have towards China's education system, nobody can deny extra time spent on learning makes a huge difference. America is the homeland of billionaire hobbyists such as Bill Gates and Steve Jobs. American students will not devote all their time to school learning so CES adds talent development to its menu.

A few factors motivate Chinese students to spend their spare time on learning. First, the rigorous high-stakes testing system gives students no excuses and no shortcuts. There are no grades to distract them or give them delusions. Second, students master the skills through large quantity of deliberate practice, and a sense of mastery improves students' self-efficacy and gives them inner motivation. Being strict with students will put them on

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

a virtuous circle of deliberate practice--mastery--enjoying deliberate practice--more mastery, while being lenient to students will put them on a vicious circle of inflated grades--not feeling the need to practice--getting easy grades anyway--minimal practice. The PISA studies basically show how rigorous testing produces mastery and excellence while fraudulent assessment measures make a whole nation of students underlearn and underachieve. CES will identify and remove factors that make American students underachieve and replace them with factors that motivate them to pursue excellence.

At CES, teachers' top priority is not teaching knowledge and skills but directing students to maximum personal growth. No matter how engaged they are in school, if they have no meaningful pursuits in their spare time, they will be left behind by students who do. CES takes a few measures to cultivate autonomous learners who can use their time wisely. First, by tightening up assessments, students feel the need to do extra practice at home. Second, teachers will have high expectations and train students to be experts in the fields. Achieving mastery and gaining expertise blur the boundary between hobby and work. Students will willingly spend their time on their expertise to perfect it. Third, academic and other competitions provide opportunities to recognize and reward students talents and expertise. Fourth, teachers are students' time managers. Any student who is not on the track of pursuing academic excellence, developing talents and expertise, or reading great books at home is an idle or broken machine that needs immediate attention.

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.*

Carolina Experimental School will achieve all the six purposes of a charter school.

1. Carolina Experimental School will create new professional opportunities

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

for teachers. CES aspires to leading the educational reform by adopting the Chinese model of teaching basic skills and balancing it with gifted education programs such as talent development and the Great Books Program. Few graduate schools offer training in these areas. CES teachers will create, theorize, and spread the CES model to reform American education.

2. We dare to set some ambitious measurable student achievement goals because the Chinese model is highly effective. Since Chinese schools first participated in international educational comparison studies in 2009, the world has been stunned by the quality of Chinese K-12 education. Shanghai 8th graders led the world in Math, Reading, and Science on the 2012 PISA. Their average math score is 40 points higher than that of Singapore, the 2nd best, and their math level is more than three years ahead of that of American 15-year-olds (<http://nces.ed.gov/surveys/pisa/pisa2012/index.asp>).

3. CES provides parents and students with expanded choices. Chapel Hill schools are excellent but many parents cannot afford to buy expensive houses and pay high property taxes. Raleigh Charter is the best but there is a long waiting list. CES has the ambition to mass-produce Raleigh Charters success. More students in the Triangle will have access to high quality education.

4. CES will improve students learning by tapping into two underutilized resources in American education: students spare time and the great books. American students underachievement may be attributed to their minimal learning at home. A Kaiser Family Foundation study shows that American 8-to-18-year-olds spent an average of 7 hours and 38 minutes on entertainment media (e.g., cell phone, music, TV, video games). After analyzing several national surveys, Gill and Schlossman (2003) found that a majority of American students at all grade levels spent less than one hour studying each day. In contrast, Chinese students may spend the most time on learning at home due to the pressure of China's rigorous testing. The huge learning gap between the two countries is really caused by the huge learning time gap. We have to find ways to making American students spend more time on learning. We have to minimize the use of grades and use final exams to measure students mastery and motivate them. We do not want students to devote their time solely to school curriculum, and we want them to be lifelong learners of great ideas and great people. Students guided and inspired by great ideas and great people will more likely become leaders who change our society for the better.

5. CES will Increase learning opportunities for all students, with a special emphasis on at-risk or gifted students. The Chinese Model is highly effective in making disadvantaged students perform at high levels. The 2012PISA data shows that Shanghais 8th graders in the bottom quarter of socioeconomic status performed much better than American 8th graders in the top SES quarter in math (562 vs 532). It essentially means that with the right approach, custodians kids can outperform physicians kids, and students in low-income country can leave students in high-income country in the dust. American educators often use socioeconomic status as an excuse for students poor performance. The PISA study shows Chinese students overachieve relative to their income per capital while American students underachieve. Money is not a necessary factor for achievement but time is, and so is motivation.

Shanghai students math performance is more than two standard deviations above the world average so the Chinese Model basically made almost all the Shanghai students mathematically talented. Talent development and the Great Books Program, two of CES's core programs, are borrowed from gifted education but they will be open to

Carolina Experimental School - Carolina Experimental School adopts best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

all the students. Such a design is inspired by the success of the Chinese Model: A rising tide lifts all boats.

6. CES encourages the use of different and innovative teaching methods. The Chinese teaching methods cannot be more different from the American ones:

- Use textbooks
- Let students memorize formulas, theorems, concepts, even poems and essays
- Let students do books after books of practice
- Lecture in front of students sitting in rows and columns
- Use the final exam as the sole measure of mastery

All these are despised and discarded by many American educators yet these outdated teaching methods made Shanghai students outperformed American students by a wide margin in math (613 vs 481).

In the late 70's, after 30 years of dogma-inflicted poverty and chaos, the Chinese were convinced by a new belief: "Practice is the sole criterion for verifying the truth." They threw away dogmas and create an economic miracle as well as an educational miracle CES is going to duplicate. The PISA data clearly indicate that countries with rigorous testing systems have the best performance but why Americans are unwilling to adopt it? The progressive education dogmas are so powerful that American educators find all types of excuses to defend the current paradigm. John Dewey is the founding father of the progressive education movement but he is also one of the founding fathers of pragmatism. It is time for us to use this side of Dewey to free American schools from dogmas. We do not need to create another fancy teaching method. What American schools need is letting practice be the sole criterion for verifying the truth. If the Chinese method produces far better results, then we need to learn from the Chinese no matter how outdated and im-progressive it is.

#### References

Gill, B. P., & Schlossman, S. L. (2003). A Nation at Rest: The American Way of Homework. Educational Evaluation and Policy Analysis , 25(3), 319337.  
Kaiser Family Foundation (2010) Generation M2: media use in the lives of 8-to-18-year-olds. <http://files.eric.ed.gov/fulltext/ED527859.pdf>

### **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.*

1) Student achievement goals

In Year 1, at least 70% of the students will score at Level 3 or above on EOG/EOC tests.

In Year 2, at least 75% of the students and 80% of the students who have been at CES for two years will score at Level 3 or above on EOG/EOC tests.

In Year 3, at least 79% of the students and 84% of the students who have been at CES for at least two years will score at Level 3 or above on EOG/EOC tests, and the 11th graders' average ACT score will be 23 or comparable to that of top 5 Wake County high schools.

In Year 4, at least 83% of the students and 88% of the students who have been at CES for at least two years will score at Level 3 or above on EOG/EOC tests, and the 11th graders' average ACT score will be 25 or comparable to

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

that of Chapel Hill high schools..

In Year 5, at least 86% of the students and 90% of the students who have been at CES for at least two years will score at Level 3 or above on EOG/EOC tests, and the 11th graders' average ACT score will be 27 or comparable to that of Raleigh Charter.

Like other NC students, CES students will take ACT Explore in 8th grade and ACT Plan in 10th grade. They will also take PSAT in 9th and 10th grades. Unlike many American educators, we do not despise testing and we know test preparation's effectiveness in improving students' basic skills. Students are encouraged to do test preparation at home so that instructional time can be protected. When CES has more financial resources, we may consider using progress monitoring programs such as MAP, IXL, Achieve 3000 but in CES's early years, we will use students' own practice test results to monitor their progress. All the students in 3rd-11th grades will have to take EOG/EOC/ACT practice tests at least once a month on their own and submit completed and scored tests to their teachers. The school will have its official practice tests one month before the NC test dates. The official practice test results will be communicated to the board in May and the NC assessment results will be reported to the Board in June. These results will also be communicated to the parents and students by email or website.

#### 2) Operations goals

- CES will be able to purchase or lease one or two school buses in Year 3
- CES will have a cafeteria when it has its own facility.
- CES will have energy and water cost 20% lower than average by taking cost cutting measures (e.g., letting teachers and students see the bills, promoting energy saving behaviors).

#### 3) Financial goals

- CES will have balanced budget in Year 1. It will have a budget surplus equivalent to one month's operational cost in each succeeding year.
- CES will build up a reserve fund equivalent to three months' operational cost at the end of Year 5.
- CES will be financially sound and credit worthy to obtain a mortgage to buy or construct a school facility at the end of Year 5.
- CES will a clean audit.

#### 4) Governance goals

- The Board will develop a five-year strategic plan.
- The Board and the school will create manuals and forms to formalize the school's operation.
- The Board will be more diversified at the end of Year 3 with at least two non-Chinese born board members.
- The school will increase its visibility by having good assessment results and publicizing its model.
- The school will attract talented teachers through increased visibility.
- The Board will use Year 1's assessment results as evidences of effectiveness to apply for starting new charter schools.

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

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

We will evaluate the schools progress in attaining its mission in the following ways:

1) Mastery of basic skills. This is the easiest and the most objective to measure because it is what EOG/EOC/ACT measure. The five-year student performance goals are listed above.

2) Talent development. This is measured by how well CES students do in academic and other competitions.

3) Great people and great ideas. First, students should be well-read and knowledgeable. They have read some classics and know what books to read next. They have a panoramic view of great people and great ideas. They will not be clueless when others talk about those people or ideas. They just need time to finish their reading goals. Second, they love writing, and writing is a way for them to develop their thinking. Third, they have higher moral development stages because great people and great ideas have accelerated their moral development. Fourth, great people and great books open a big world to the students so they feel they never have enough time. Great books will create autonomous learners naturally. Fifth, great books will improve students reading and writing levels. Sixth, CES students erudition, deep and sophisticated thinking will be shown in their essays, discussions, debates, and initiatives.

4) Autonomous and disciplined learners. Some students become autonomous learners because they pursue excellence. They are in the virtuous circle of practice-improvement-self-efficacy/inner motivation-practice. Some students become autonomous learners because they have endless goals to realize (e.g., read all the bestselling nonfiction of the past ten years). Autonomous learners have their own agendas. After finishing their teachers assignments, they will work on their own.

5) Time use. Students have so many books to read, or skills to hone that they despise aimless people. When every student has endless meaningful pursuits on their agendas, it will be hard for a school not to have good results. All the time wisely spent will grow students knowledge, skills, and ideas.

6) Motivation. CES will adopt Pink's (2011) Mastery-Autonomy-Purpose model of motivation. Mastery puts students in a virtuous circle. Great books give them a purpose. They will be self-starters.

7) Educational reform. We greatly respect charter schools that target disadvantaged students (e.g., KIPP) but CES has a different approach to improving American education. We want to prove best educational practices of top performing countries can be used in American schools, and we also want to prove high quality schools can be mass-produced by using these practices. Educators tend to say China's system will not work in America because these are two distinctive cultures. China's educational system is also viewed as one-dimensional. If we create a successful school right here, it will stop all these denials and excuses.

Our short-term vision for CES is to make it the best school in North Carolina. Currently, Raleigh Charter is the best (open-admission) high school in North Carolina. We want to prove Raleigh Charter should not be an outlier and a new school with similar location can reach its quality in five years. We start with middle grades for two reasons. If we start as a high school, our impact on the students will be limited because their learning habits, motivation, and basic skills have less room to change. If we start as an elementary school, we can shape the students in the ways we want but it will take too long to prove Raleigh Charter's success can be duplicated. After CES joins Raleigh Charter's league, our next targets will be schools

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

in Massachusetts, America's top performing state. Our ultimate vision is making our students' basic skills as good as those of East Asian students and at the same time giving them the freedom to develop their talents and philosophical thinking.

Pink, D. H. (2011) Drive: The Surprising Truth About What Motivates Us . New York: Penguin.



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<b>Section II: Mission and Purposes Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Not clear on exactly what the mission statement means.	Sherry Reeves	Mission Stat
Could the applicant be more succinct in their description of the mission? The current description seems quite convoluted and not as focused as it should be.	Douglas Price	Mission Stat
Mission statement is vague. What are the specific aspects of the school that would make it a leader in education reform?	Cande Honeycutt-Killian	Mission Stat
The mission is rather confusing and overly broad- can the applicant clarify the evidence-based practices claim? How is education reform tied to one school specifically?	Nicole Charles	Mission Stat
What has the board chosen stated as a specific model? Is there evidence that the mission can address the needs of American children and adhere to U.S laws?		
The dual mission of the organization is confusing. It is not clear how this school will be an example of education reform.	Greg Schermbeck	Mission Stat
The "general student population" is not a targeted student population. The applicant should provide more information regarding why China's educational system is being used as a model. The applicant compares educational attainment scores between China and NC. These don't appear to be equitable comparisons. Further, 30 completed surveys is not a sufficient amount of data to capture educational need or interest.	Greg Schermbeck	Educational
Narrative states targeted population is general student population but then states the aim is to start school in an area with a large Asian population. Wouldn't that be a target population? How will teachers manage student time away from school? (Teachers are students' time managers. Any student who is not on the track of pursuing academic excellence, developing talents and expertise or reading great books at home is an idle or broken machine that needs immediate attention.)	Sherry Reeves	Educational
Parent survey is insufficient to provide evidence of demand for this school. Only 30 families responded. The enrollment is 200 for the first year. That is insufficient to show there is a demand.	Cande Honeycutt-Killian	Educational
The targeted population is not specific. How will the methodology used in the Shanghai system meet the educational needs of the student population. Besides the research on the system itself, what other evidence is available to show these methods would work for the targeted population?		
Applicant needs to provide additional evidence to support both the need of this model in this community and it's efficacy with American students.		
Is there a targeted student population identified by CES that does not violate charter law? The general student population is listed, however, the remaining application appears to be geared toward families who support a Chinese teaching methodology.	Nicole Charles	Educational
Is schools in Durham and Wake are targeted, why are they not both included in the comparison data?		
Can the applicant clarify the education plan? How will the success of all students be considered including any student not familiar with Chinese schools or those not thriving in high stakes testing environments?		
Are the enough students in the triangle interested in this philosophy to fill the projected seats? Is there associated market research?		
What does is mean when a student is "an idle or broken machine that needs immediate attention" in terms of intervention at CES?		

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p><b>Applicant needs to clarify: What research has been done to indicate a need and or interest for a school like this in Wake county?</b></p> <p><b>Applicant needs to clarify: A lot of data is shared about how the Chinese educational system works, what evidence is there to support that this approach will work for American Children?</b></p> <p><b>Applicant needs to clarify: How will "finding meaningful pursuits" in their spare time play out? What strategies are in place to support students who may not have the time and or financial ability to engage in additional extracurricular activities?</b></p>	Kristen Parker	Educational
<p>Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>.</p>	Deanna Townsend-Smith	Educational
<p>Purposes provide general information but does not provide specific details as to how this school will meet the proposed purposes. What is innovative about this school? Applicant needs to provide specifics and elaborate.</p>	Cande Honeycutt-Killian	Purposes of
<p>The applicant does not clearly describe how the proposed charter will achieve legislative purposes. The purposes provided are general and not specific. For example, it is unclear how the applicant will assess or measure the new professional development opportunities for teachers.</p>	Greg Schermbeck	Purposes of
<p>How are teachers responsible for learning given the rigid curriculum proposed? How does CES improve student learning rather than maximize the talents of those already succeeding?</p> <p>What is innovative about the use of textbooks, memorization, and reading of books?</p>	Nicole Charles	Purposes of
<p><b>Applicant needs to clarify: How will teachers have the opportunity to be responsible for learning at the school?</b></p> <p><b>Applicant needs to clarify: Evidence provided continue to narrate how the school is modeled after Chinese Education and the impact it has had in China. How can you ensure that the same results will occur within the American Education System?</b></p>	Kristen Parker	Purposes of
<p><b>Can the applicant be more specific in answers #1 of the 6 Leg. Purposes?</b></p>	Douglas Price	Purposes of
<p><b>Strong goals. I would like to hear more about the goal of having two non-Chinese born board members (especially surrounding the legality of a nationality requirement).</b></p>	Steven Walker	Goals for th
<p><b>What is the existing data that supports the goals set for Goal 1? Is this goal attainable for students in the community this school proposes to serve?</b></p>	Cande Honeycutt-Killian	Goals for th
<p><b>Are the achievement goals manageable and realistic if a variety of students attend CES?</b></p> <p><b>Are the actionable steps toward a building purchase? The applicant should clarify operations goals.</b></p> <p><b>How will the financial goals be accomplished given the proposed budget?</b></p>	Nicole Charles	Goals for th
<p><b>Applicant needs to clarify: Goals are outlined but not specific enough. How will the board measure "Great people and great ideas?" How will Autonomous and disciplined learners be measured?</b></p>	Kristen Parker	Goals for th
<p><b>Is there evidence to suggest that 70% scoring at Level 3 or higher is feasible in this LEA? Should they anticipate receiving the lowest in the county?</b></p>	Douglas Price	Goals for th
<p><b>ACT Explore has been replaced with ACT Aspire.</b></p>	Sherry Reeves	Goals for th

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

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Anthony Helton	Fail
Cande Honeycutt-Killian	Fail
Nicole Charles	Fail
Phyllis Gibbs	
Glenn Allen	
Kristen Parker	Fail
Robert McOuat	
Steven Walker	Pass
Greg Schermbeck	Fail
Tammi Sutton	
Sherry Reeves	Fail
Deanna Townsend-Smith	
Douglas Price	

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

### 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.

CES taps into two underutilized resources in American education: time and great books. Chinese students perform the best in the world because the most rigorous testing system motivates Chinese students to spend the most time on learning.

#### The Chinese Model

- Use rigorous testing (e.g., entrance exams for middle school, high school, and college, final exam as the sole measure of proficiency) to push students to invest more time on learning
- Use textbooks to create a common curriculum and ensure systematic teaching and learning
- Use student ownership of textbooks to create autonomous learners.
- Use large quantity of high quality practice to achieve mastery of skills.
- Memorization is not belittled as a lower order thinking skill but is considered a quick way to laying the foundation. Students are required to memorize key facts (e.g., formulas, multiplication tables, concepts, definitions, theorems) and important texts (e.g., poems, famous essays).

#### The Effectiveness of the Chinese Model

According to the 2012 PISA study, Shanghais 8th graders performed the best in Math, Reading, and Science among 65 economies. In Math, Shanghai students outperformed Singaporean students, the 2nd best, by 40 points, nearly one standard deviation. Shanghai students' math performance is over three years ahead of American students (613 vs 481). Florida students score of 467 may be a good estimate for NC students math performance.

CES will adopt the Chinese model in its basic skills instruction. Chinas mastery-driven and hence test-driven system produces excellent results but its one-dimensionality makes it hard for Westerners to accept. We add two more components to motivate students to pursue excellence: talent development and great books.

#### Schoolwide Talent Development

There is a shift from serving the gifted few to developing talents for all in gifted education in the past 20 years. Researchers on expertise find that talents are not innate and they can be developed through deliberate practice. It is confirmed by the PISA data. Shanghais 8th graders in the bottom quarter of SES averaged 562 in math, which will make them be identified as mathematically talented in America. The Chinese model is essentially schoolwide talent development in school subjects, and it can

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

even make disadvantaged students perform at very high level. America is a place where teenage hobbies could evolve into world class companies. CES will use all types of competitions to identify and recognize talents. Many people use Americas lead in innovation to deny American schools crisis. CES will integrate the best of the two systems to make itself the envy for both countries.

The Great Minds Program

Talented individuals without a purpose will have difficulties putting their talents into use so we add the Great Minds program to develop students philosophical thinking. We broaden the Great Books program by including current classics, biographies of great people and non-text classics (e.g., art, music). Students inspired by great minds will want to know all the great works in the world.

### **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.*

CES's school day runs from 7:30 to 15:10. Its elementary school starts the 1st period at 7:30, 2nd 8:30-9:20, 3rd 9:30-10:20, 4th 10:30-11:20, lunch 11:20-11:50, 5th 11:50-12:40, 6th 12:50-13:40, 7th 13:50-14:40, 8th 14:40-15:10); its middle school starts the 1st period at 7:40, has lunch from 11:50 to 12:20, and has the study hall from 7:30 to 7:40 and 14:40 to 15:10; its high school starts the 1st period at 7:50, has lunch from 12:20 to 12:50, and has the study hall from 7:30 to 7:50. All the three schools start and end at the same time so that carpooling parents and students do not have to wait. The different schedules avoid congestion during lunch and recess. From 15:00 to 15:10, students clean their classrooms and the areas assigned to their classrooms. Students receive instruction 7 periods (50 minutes each) a day, and the 8th period (which is split into halves for the middle and high schools) is a study hall.

There is a 10-minute recess between two periods for students to release some energy and recharge. This Chinese practice improves students health and focus and makes learning efficient. Only school students in America have recess, and the five minutes between two periods are only for changing classrooms. The 10-minute schoolwide aerobic exercise is another good Chinese practice we want to borrow. It gives students an opportunity to stretch, and it also develop a sense of group honor.

The average class size at CES is 20. We may increase the class size to get more funding so that we can hire more teachers to add more varieties to our course offerings. The average class size in China is 50 so class size is not really correlated with student performance.

The desks will be primarily in columns and rows, as how they are arranged in China. This ensures students focus. Some students sitting in pods will have difficulty looking at the board. Other desk arrangements may be used when necessary.

CES emphasizes the importance of school culture. A healthy school culture motivates students to pursue excellence and reduces behavioral problems. One way to build a strong school culture is to cultivate a sense of group honor. American schools sense of group honor is more in sports than in academics.

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

We will identify comparable targets (e.g., local public schools, other charter schools, best schools in the region or the state) and motivate students to compete with them (e.g., test scores, rankings in academic competitions). There will also be competitions among homerooms (e.g., cleaning, aerobic exercise, chorus).

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.*

CES will adopt China's practices of letting students own textbooks and using textbooks to guarantee systematic teaching and learning. Students will buy cheap used textbooks or have access to online textbooks. One salient feature of Chinese schools is the student ownership of textbooks. American textbooks are often \$100 five-pound hardbacks while Chinese textbooks are mostly \$2 12-ounce paperbacks. American students borrow textbooks for a semester whereas each Chinese student owns all the textbooks in all subjects in all the 12 years in school. Each Chinese student also owns dozens of study guides and test preparation books. Textbook ownership creates autonomous learners while "textbook rentership" creates dependent learners (who only do homework assigned to them but nothing else). Chinese students are responsible for everything they have learned so they self-remediate by reviewing old textbooks. In America, most students do not have tutors, and they solely depend on their teachers to review old skills. Owning textbooks level the playing field for low SES students. A custodian's kid in Shanghai owns more learning materials than a physician's kid in America, which partially explains why the 2012 PISA data shows that Shanghai's 8th graders in the bottom SES quarter performed much better than American 8th graders in the top SES quarter (562 vs. 532).

In addition to the review function, textbooks are also safeguards for systematic teaching and learning. In China, textbooks are the curriculum. Chinese teachers do not need to create a curriculum so they can devote all their time to teaching. Having a contempt for textbooks, many American educators use handouts to show they are adaptive and creative. Teaching with handouts is often not systematic, and students will throw away these handouts sooner or later, making review impossible. In some subjects (e.g., English), textbooks are rarely used. American students in a language arts class often read a few novels a year while Chinese students study about 50-60 full-texts or excerpts in the language arts class each year. Chinese students are exposed to much more authors. A textbook is written by dozens of experts. When teachers choose their own texts, there is the danger that something important is omitted. CES teachers still need to create curriculum for CES's innovations. In many subjects, we will use existing textbooks. What matters is not Saxon Math or Singapore Math but whether students are autonomous learners.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

CES's curriculum covers the NC curriculum standards but goes beyond them. The state standards are mostly knowledge and skills while the CES curriculum has motivation and purpose components. The state standards are for average learners and average learning time while the CES curriculum is designed to increase students learning quantity (e.g., more time on learning) and quality (e.g., great books). Students proficiency and motivation are bottlenecks in American schools. Low proficiency makes learning tasks difficult and make students unmotivated to learn. Lack of motivation makes students spend inadequate time on learning and makes them not proficient. This vicious circle may explain why nearly half of North Carolina's students are not proficient in math (45.3%) and reading (43.1%) in the 2015-16 academic year. China's virtuous circle starts with rigorous and high-stakes testing which pushes students to spend long time on learning which produces mastery of skills which creates inner motivation to learn. CES adds talent development and great books as alternative sources of motivation. Motivated learners have learning power many times that of unmotivated learners. CES's curriculum increases students learning power by:

- 1) Letting students read education and psychology classics
- 2) Selecting motivational texts
- 3) Using great books to inspire and motivate students
- 4) Using great books to guide students and give them a purpose
- 5) Using great books to develop students' thinking

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.*

CES will adopt China's instructional practices in its basic skills instruction.

1) Teach systematically.

Textbooks are safeguards for systematic teaching. Many American teachers despise textbooks and teach with Powerpoint and handouts. Students tend to throw away handouts sooner or later so they have not formed the habit of reviewing learned skills. The practice items in the textbook tend to be better in quality and quantity than those in the handouts. The presentation style of teaching (PPT plus handouts) systematically creates gaps in students' knowledge. Most American students have never owned a grammar book, not to say have gone through one. Some topics have never been taught whereas other ones have been repeatedly taught.

2) Achieve mastery through large dose of deliberate practice.

Many American students only do practice items assigned by their teachers. Chinese students have much more homework, and they also try to find problems they have never seen to solve, so Chinese students are not only taught systematically but also learn systematically. Both reduce gaps in knowledge.

3) Teach students how to learn.

Chinese students often ask how they can improve their performance, and teachers often tell them to solve as many problems as possible. Many American students have never done an ACT practice test. It seems they do not know how mastery is attained. CES students are expected to become autonomous and disciplined learners as earlier as possible. They will read education and psychology classics to understand learning and improve their motivation.

4) Motivate students

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Chinese schools do all types of things to motivate students: appeal to patriotism (e.g., "Learn for the rise of China!"), developing a growth mindset (i.e., "Unused brains will get rusted." "An iron rod can be ground into a needle if enough efforts are made."), and selecting motivational texts (e.g., The Last Class). American teenagers are wasting nearly all of their wake hours. No good teaching can compensate this big deficit so enabling them to use time wisely should be the top priority for educators.

5) Let students adapt to the learning tasks, not the other way around.

"Fun" should not be a primary consideration in designing instructional activities. American teachers are often judged by their abilities to engage students. As a result, they often sacrifice rigor and systematicity for fun, and students are addicted to fun. Many skills are hard to teach in a fun way. Chinese teachers often tell students that learning is a students job and sometimes it is boring. Chinese students obtain joy of learning through their mastery experience. These disciplined learners have inner motivation and high tolerance for abstract concepts. CES teachers will facilitate even accelerate the sophistication of students thinking and make them pass that fun-seeking stage to become disciplined learners.

6) Concepts are more important than algorithm.

American math education emphasizes algorithm while Chinese students have to also memorize definitions, theorems, and formulas. American 10th graders no longer do Euclidean proofs, and teachers do not prove theorems and postulates any more. Memorization has to be kept to a minimum so a crown jewel of the western civilization is thrown away. Ironically, Chinese 8th graders still do Euclidean proofs so they can handle very complex math problems. Most math worksheets are calculations which is for algorithms rather than concepts. That is why many students do not do well on state tests and the ACT, which have more word problems and require conceptual understanding. CES will facilitate students conceptual understanding to enable them to utilize great people and great ideas.

7) Connect learned skills into a web

Chinese schools generally finish new lessons a few months earlier in 8th and 12th grades to leave enough time for a consummative review. CES teachers will connect isolated units to help students generalize their skills.

*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.*

In 2015, 56.3% of North Carolina students are proficient but 85.6% of seniors graduated and the promotion rates were much higher. This means schools are passing students who are not ready for the next stages of education. This is an American phenomenon. By being lenient on its students, Americas deep rooted progressive education tradition is hurting them. Most American students' academic deficiencies are institution-induced rather than innate. The grade system is a major culprit. First, it fails to motivate students to spend more time on learning. Being happy with passing grades, many students are only willing to do the minimum. In comparison, Chinese students maximize their time on learning to increase their test scores. Second, grades are inflated and are padded with homework, attendance, attitude, skills in other subjects (e.g., artistic students always have an advantage in doing projects) and parents' help so they are no longer about what students can do. In China, only final exam scores count so students try to find all types of challenging problems to prepare for the exams. They perform the best in the world because China's assessment is the most rigorous. There are huge discrepancies between American students' grades and



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

their EOG/EOC scores because grades tell lies. These institutionalized lies have to be stopped so that students have a realistic view of what they can do. Third, the grade system makes students forget the real purpose of learning. Many students only do work that will be graded. They forget their real purpose is to master the skills. If they have not mastered a skill, they need to find practice work on do though they cannot trade it for credit.

To improve students proficiency rates, we have to shift our assessment from grades to test scores.

- 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?*

CES will meet Future-Ready Core requirements by requiring students to complete four credits each in English, Math, and Social Studies, three credits in Science, two credits in a world language, and one credit in Physical Education. In addition to the 18 mandatory credits, students also need at least four electives for graduation. A credit is earned by having a passing grade at the end of a course. A credit can also be earned by passing a demonstrated mastery test, and by earning a credit this way students do not have to sit in the class for certain number of hours.

Grade point averages will be calculated this way: A = 90-100 = 4 points; B = 80-89 = 3 pts; C = 70-79 = 2 pts; D = 60-69 = 1 pt; F < 60, F = 0 pt.

The 4.5 scale will apply to honor courses, and the 5 scale will apply to AP courses.

Transcripts will include a list of all courses attempted, the grades earned, and the points earned. Both weighted and unweighted GPAs will be listed. All scores from state tests will be included.

- 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.*

CES will adopt China's best practices. One of salient characteristics of Chinese schools is long school hours in 8th grade and 12th grade. Students often stay in school from 8 am to 9 pm in these years before the high school and college entrance exams. We know the high correlation between schools' time on learning and their performance but at this moment we do not plan to increase students' achievement by increasing school hours. We follow the regular traditional school calendar, and we want to prove if we can use the school time wisely and also motivate students to learn at home, we can still significantly increase students' performance.

CES taps into students' spare time and the great books, the two underutilized resources in American education. The 2012 PISA data shows that Shanghai's 8th graders in the lowest socio-economic status quarter performed better than America's 8th graders in the highest SES quarter (562 vs 532 in math). It essentially means custodians' kids can perform far better than physicians' kids if the former spend much more time on learning than the latter. It also suggests most students can achieve mastery and appear to be academically talented if they invest enough time on their skills (562 is more than one standard deviation above the world's average

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

math score). How did these Shanghai students deliver such stunning performances? First, China's rigorous testing system allows no excuses so each student has a clear purpose: To get the best test scores as they can. Second, there is no short cut so students have to do endless practice to achieve mastery. Third, students' sense of mastery help develop their self-confidence and inner motivation. This purpose-practice-mastery-motivation virtuous circle is the secret of Chinese students' academic success. Educators have to compete with students' desire for fun for their spare time. American teenagers spend more than 7.5 hours on TV, games, internet and cell phones each day. This is the failure of education. CES enables students to make meaningful time use by making them master basic skills, go deep into their talent areas, and read great books. Big tests measure basic skills so having solid skills will increase students' ambitions. Students will invest more time on them so that they can have good SAT/ACT scores. CES students will participate in all types of competitions. Winning these competitions will motivate them to invest more time on their talents. Great books will make students humble, and they will realize they have endless great minds to meet so they have no time to waste. CES cultivates autonomous learners by helping students master basic skills, discovering and recognizing students' talents, and exposing them to great minds. Skills and great ideas are great motivators. A school's job is to help students develop a sense of mastery so that they will enter the purpose-practice-mastery-motivation virtuous circle and become autonomous learners. Winning students' 7.5 hours gives CES an edge over other schools and gives CES students an edge over other students.

### **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.*

Chinese schools do not have EC teachers or other intervention specialists. They use an "a-rising-tide-lifts-all-boats" approach in improving students performance. "Slow birds fly first" is teachers admonition. Chinese schools create disciplined learners who strive for excellence rather than relax the standards or cater to childrens desire for fun. Their no-nonsense, no-frills approach enables low SES students to perform one or two years above the world average in math. The 2012 PISA data shows that Shanghais 8th graders in the bottom quarter of socioeconomic status outperformed American 8th graders in the top SES quarter in math by a wide margin (562 vs 532).

Most American students' academic deficiencies are institution-induced rather than innate. Our approach is to identify the culprits and root them out. The grade system is a major culprit. First, it fails to motivate students to spend more time on learning. Being happy with passing grades, many students are only willing to do the minimum. In comparison, Chinese students maximize their time on learning to increase their test scores. Second, grades are inflated and are padded with homework, attendance, attitude, skills in other subjects (e.g., artistic students always have an advantage in doing projects) and parents' help so they are no longer about what students can do. In China, only final exam scores count so students try to find all types of challenging problems to prepare for the exams. What is how world class athletes prepare for their tournaments. Chinese students perform the best in the world because China's assessment is the most rigorous. There are huge discrepancies between American students' grades and their EOG/EOC scores

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

because grades tell lies. These institutionalized lies have to be stopped so that students have a realistic view of what they can do. Third, the grade system makes students forget the real purpose of learning. Many students only do work that will be graded. They forget their real purpose is to master the skills. If they have not mastered a skill, they need to find practice work to do though such work will not earn credit for them. To prevent grades-induced underachievement, CES will let students focus on final exams and big tests. We will give students EOG practice tests to find out their real grade levels. A 6th grader scoring 50% on an EOG practice test will do a 5th or 4th grade one until she can score 80%. Students below grade level will review lower grade textbooks to catch up.

The deep-rooted progressive education beliefs are another culprit for American students' underachievement. The progressive education movement has its merit in history but it has become a new dogma. Testing, test preparation, memorization, drill, textbooks, and rote learning have become derogatory words although they are the very practices that make Chinese students best performers. At CES, teachers will feel safe to have these practices. E. D. Hirsch (1999) rightly points out that neglecting basics hurts disadvantaged students because middle class parents can teach basics at home while disadvantaged students solely rely on the school for learning these basics.

The third culprit is the teacher evaluation system. First, it values looks over results. This encourages teachers to be fun and creative and avoid boring and tedious work though it may benefit students more. Second, the current system values what is going on in the classroom over what is going on at home. No matter how engaged students are in school, if they spend an average of 7.5 hours on TV and phones, they will be left in the dust by the Chinese. Third, the current system values higher order over lower order thinking skills. Teachers emphasize basic skills get punished because those tend to require lower order thinking skills. This is how good theories like the Bloom's Taxonomy get misused.

Hirsch, E. D. (1999). *The Schools We Need: And Why We Dont Have Them*. New York: Anchor.

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.*

1) Identification

CES will use Home Language Survey (HLS) to identify ELL students, and it will use the World-Class Instructional Design and Assessment (WIDA) to determine the level and time of services these ELL students will receive.

2) Instructional programs, practices, and strategies

If CES has about 20 ELL students, a full-time ESL teacher will be hired, and if there are 10 ELL students or less, a part time ESL teacher will be hired. The ESL teacher will help the school administrator determine each ELL student's achievement level to make appropriate grade level placement and scheduling. CES's ELL programming may include ESL, bilingual education, and inclusion. ELL students will have individual plans which include assessment

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

information and accommodations. Parent volunteers or college student volunteers who speak these ELL students' primary language will be enlisted to help them in school.

### (3) Monitoring and Evaluation

ELL students will take the Assessing Comprehension and Communication in English State-to-State for English

Language Learners (ACCESS for ELLs) test each year. It will be used to assess their English language proficiency and progress in listening, speaking, reading, writing, and comprehension. ELL students exited from the program will be monitored for a minimum of 6 months. Support will be provided if they begin to have difficulty.

### 3. *Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*

- a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
- b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

### Identification

Talent development and the Great Books program, two of CESs programs, are borrowed from gifted education but will be open to all the students. Such a design is inspired by the Chinese Model. The 2012 PISA data shows that Shanghai's 8th graders in the bottom quarter of socioeconomic status performed much better than American 8th graders in the top SES quarter in math (562 vs 532). The Chinese Model basically can make almost all the students in a metropolis mathematically talented. The schoolwide talent development design also reflects the current trend in gifted education. Students with high IQs are entitled to gifted education under the old paradigm. Under the new paradigm, talents are not considered innate; they can be developed. This view is also supported by theories on growth mindset, grit, and deliberate practice. Services drive identification. Since we provide gifted education for all, we do not feel the need for identification. However, parents are encouraged to provide psychological reports and other information to the school.

### Programs and Strategies

- Acceleration. There are huge performance gaps between NC students and top performing states and countries. Keeping this in mind, CES encourages students skip grades by passing those grades tests.

- Competitions. Students will participate in school, regional, state, and national academic and other competitions. Students will have ample opportunities to shine. These competitions will also provide ample goals for students to achieve. Students will be able to use their spare time meaningfully to hone their skills to achieve these goals.

- Advanced Placement courses.

- Results-driven planning. Teachers will have year end products and skills in mind when planning the whole year's lessons. This will avoid having random activities that do not build up abilities.

- Clubs. Students will explore their interests in the after-school clubs.

- Olympic Game. CES will have a two-day year end Olympic Game to demonstrate and celebrate students talents. It will include competitions in sports, arts, music, academics, and other areas. Special categories will be identified for students who are not strong in traditional talent areas so

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

that each student has the opportunity to shine. Winning classes and individuals will be recognized.

Progress Monitoring

- Talent Development Plan. Each student will have a Profile of Strengths and Interests and a Talent Development Plan (TDP). The TDP states the students current levels and sets goals for the year.

### **Exceptional Children**

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

### **Identification and Records**

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

There are several ways the school will know if a student has an IEP or a 504 plan. First, the parents will declare this on the enrollment form or at the admission interview. Second, the EC teachers can check the CECAS to see if the student is in the state's EC database. Third, the student's former school may send his or her EC record to our school.

Teachers and parents can refer students to the EC teacher. The EC teacher will arrange an EC referral meeting and start to collect data. Regular education teachers will complete a referral form to share their observations about the student's strengths and weaknesses. The EC teacher will observe the student in at least two different settings. The parents will complete a social and developmental history survey. They will also provide the EC teacher with any medical or psychological evaluation report done previously. The EC teacher will collect data from the student's cumulative file (e.g., EOG test scores, grades, attendance). The EC teacher will share a summary of data at the referral meeting. The team will decide whether to have the student evaluated by a psychologist. After the student has been tested, the EC teacher will schedule an eligibility meeting and use the psychological report to write an eligibility determination draft. The EC team will determine whether the student is eligible for EC services. If the student is eligible, the team will develop an IEP. The eligibility determination process should be completed within 90 days after receiving the written referral.

The EC teachers will serve students with IEPs. They will also update 504

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

plans.

The EC teachers will manage the records of students with disabilities and 504 Accommodation plans.

- They will use the online CECAS software to write EC documents and keep hard copies in students' cumulative files.

- They will go to charter schools' quarterly EC training sessions to get new updates. They will also attend the DPI EC Division's annual conference to get the training they need. They will ask the DPI EC consultant assigned to the school when they are not sure about certain policies.

- They are responsible for EC records' completeness, confidentiality and currency.

- EC records' completeness. An EC record will include four sub-folders: the initial referral and evaluation, the testing reports, the reevaluations, and current and old IEPs. At the beginning of each semester, the EC teachers will use the DPI's checklist to check new students' EC records for its completeness. They will request missing documents from the students' previous schools by faxing the completed form.

- Record confidentiality. The EC records will be locked in the file cabinet. Any teacher who wants to read a file needs to sign out and sign in. Discarded EC documents need to be shredded.

- Record compliance: The EC teachers will create a matrix of key EC students' information (e.g., IEP expiration date, reevaluation due date, types of disabilities, accommodations) and plan EC meetings well before the due dates. They will send a written notice to the parents to arrange a meeting at least 10 days before the IEP's expiration date and 20 days before the reevaluation's due date. They will get training on the DPI's EC auditing by attending the DPI's training sessions.

- 504 accommodation plans completeness, confidentiality and currency will be maintained similarly.

### 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.*

CES will try to offer EC students a full continuum of services such as inclusion, resources, pull-out, and consultation services to EC students, and if needed, service for hospital-bound students.

EC teachers will coteach with regular education teachers in classes with large concentration of EC students to ensure they receive appropriate differentiated instruction. The EC Coordinator will also serve as 504 Plan Coordinator. EC teachers will develop 504 plans for EC students who need accommodations.

Before the new semester, the EC teacher will compile a spreadsheet listing EC students' service areas and time. The administration will make sure these students' class schedule meet these requirements. This information will also be used to determine EC teachers' class schedules. At the beginning of the semester, EC teachers will print each student's IEP summary with information about goals, classroom accommodations, testing accommodations,

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

and service areas and time, and give each regular education teacher of the student a copy. Regular education teachers will make sure students get the accommodations they need. EC teachers will use standardized tests (e.g., EOG, EOC, ACT Explore, ACT Plan, ACT, PSAT) and practice tests to monitor EC students' progress. They will also seek regular education teachers' comments on EC students' strengths, weaknesses and progress. EC teachers will write a quarterly progress report for each EC student every nine weeks and send it to the parents.

If some students need related services, CES will pay certified professionals to provide speech, occupational therapy, physical therapy, and other related services.

CES will comply with all the EC laws and policies but we need to keep in mind there are no EC teachers and school psychologists in China's regular schools. China has traditional disability categories such as deaf, blind, and severe intellectual disability but China's schools do not identify learning disabilities and ADHD, the two largest categories in American schools. The rapid expansion of special education in American schools since 1970's is America's way to address at-risk students. A lot of underachievement is institution-induced: the grades system (vs. the rigorous final exam system), the anti-testing ethos, the fun-seeking mentality, the lack of systematic teaching (handouts vs textbooks), and the contempt for memorization. Adopting the Chinese way of teaching basic skills will root out most underachievement. In gifted education, there is a shift from gifted children's entitlement to talent development for all. In special education, there should be a similar shift from entitlement to the growth mentality. Adopting the Chinese way of teaching is intervention for all. A rising tide lifts all boats. If Shanghai custodians' kids can perform better than American physicians' kids, then we can also expect CES's EC students perform better than average students in traditional schools.

## **Student Performance Standards**

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

1) CES has two sets of performance standards: the NC standards and the acceleration standards. The former is used for promotion while the latter is used to compare CES students with those in top performing states and countries. Students in 3rd to 8th grades need to perform at Level 3 or above on the EOG tests to be promoted. Students performing below Level 3 will be placed on probation, and they have to pass equivalent state tests to have their probational status removed. The NC standards are often considered less challenging by people from other states. Keeping this in mind, we encourage able students to skip grade level courses by passing grade level tests. North Carolina does not have high school exit exams. CES seniors should have

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

a composite ACT score of 20 or above or the equivalent on the SAT to get their high school diploma. CES students may earn high school credit for some courses without spending time taking the course in the classroom. Under this Credit by Demonstrated Mastery (CDM) option, qualified students may "test out" a course if they have already mastered the content.

2) CES uses additional assessments to encourage mastery and acceleration. Each student has basic skills goals. An 8th grader who got 50% right on the 7th grade math EOG test may have a goal of getting 70% right on the 7th grade EOG test. He will review 7th grade math and complete at least one 7th grade EOG practice test every week at home until he scores 85% or above on a 7th grade test. If 7th grade math is difficult for him, he will review 6th grade math. All CES students are required to do self-remediation like this. Teachers will recommend resources (e.g., textbooks, test preparation books) to parents and students. CES encourages students to take nationally-normed tests (e.g., PSAT, SAT, ACT Plan) so that we know our students' state and national ranking.

3) There is a huge gap between American schools' graduation/promotion rates and students' state assessment passing rates. Many students know they will be promoted/graduated anyway so they have little incentive to spend time on learning. We have to break students' "iron bowls" so that they are motivated to practice and perform. East Asian students have the best performance because their tests matter. CES will use test scores rather than grades to make promotion/retention decisions. Other factors (e.g., grades, teacher observations) may be considered when students are close to passing the state tests. CES students scoring Level 1 on the EOG/EOC tests will be retained. Students scoring Level 2 will be promoted conditionally. Juniors with a composite ACT score below 17 will be retained conditionally. Students on probation will take equivalent tests again before the end of September. If they pass the tests, their probational status will be removed; if they fail the tests, they will be retained. Students on probation will have the whole summer to do remediation. This promotion policy also applies to students with special needs but non-test factors may have bigger weights in making promotion decisions regarding them. The promotion criteria will be communicated to parents and students on the school website and in the student handbook. They should know about these criteria before choosing to attend the school.

4) Eighth graders need to score at Level 3 or above on the EOG tests to graduate from middle school. They can get promoted by passing the test they have failed.

Senior need to earn enough credits and have a composite ACT score of 20 or above to get their high school diploma. They can take the ACT test until they have a passing score to get their diploma. "At-risk" students will take remediation classes or receive tutoring so that they can pass the required tests. At-risk students who have difficulty passing the required tests will be evaluated on a case-by-case basis and factors such as growth, grades, teacher observations will be used to determine whether a waiver can be granted.

### **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*



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

*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.*

1) We believe in the importance of intrinsic motivation in students' discipline. Rewards are heavily used in American schools. Teachers often use tokens, food, candies, stickers, and other tangible rewards to encourage desired behaviors. Research has shown extrinsic motivation negatively affects students' performances (Pink, 2011). Students' addiction to rewards often means

teachers in higher grade levels have to rely on students' extrinsic motivation to get things done. The salience of reward and punishment in American schools may be attributed to America's strong tradition in behaviorist psychology. Teachers in China's schools rarely give tangible rewards. Students' good test scores do get announced in class and good work samples are displayed on the wall. Schools in China use honors to promote good behaviors. There are constant competitions among classes in academics (e.g., tests scores, academic competitions), activities (e.g., chorus, group aerobic exercise, parade), services (e.g., classroom cleaning) and behaviors.

American schools have similar competitions among classes (e.g., food drive for the food bank) but the frequencies and the varieties are far fewer. The group honor system is very effective. China's schools have far fewer behavior problems. Classroom management is far less a concern for teachers in China. We will adopt the group honor system to promote students' self discipline.

Our school's emphasis on the great books will also contribute to students' self-discipline. Cultivating students' philosophical thinking through great books will accelerate students' moral development. Students in higher moral development stages will have fewer behavioral problems.

2) These offenses may result in suspension of students:

- Violence
- Hate violence or speech
- Sexual harassment
- Selling or using drugs, alcohol or tobacco
- Bullying
- Using profanity at a staff or faculty member
- Noncompliance with a staff or faculty member
- Disrupting the class repeatedly
- Skipping a class without permission

These offenses may result in expulsion of students:

- Possessing a gun or other deadly weapon on school grounds or at a school

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

activity.

- Making a bomb threat
- Using a deadly weapon to commit a crime off school grounds.
- Selling illegal drugs at school or outside school.

3) When a decision needs to be made about an EC student, a manifest determination meeting will be conducted. The IEP team will determine whether the student's offence is a result of his disability. If the answer is yes, then he will not be disciplined but steps such as developing a behavioral intervention plan will be taken to help him reduce behavioral problems. If the answer is no, then he will be disciplined as an ordinary student will.

#### 4) Due Process Rules for School Discipline:

The more severe the disciplinary action is, the more formal the due process requirements are. The administrator (s) must have a conference with the student to explain what rules have been violated, what evidence supports the allegations, and what punishment he will get. The student will have the opportunity to give his explanation. The parent will be notified of the reason and duration of the suspension, and the right to appeal. If the student or parent disagrees with the suspension, they can have a meeting with the administrators to resolve the grievance. If the grievance is not resolved, a written appeal may be made to the school board at the next regular board meeting.

Pink, D. H. (2011) Drive: The Surprising Truth About What Motivates Us . New York: Penguin.



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p>related assessments. The applicant also does not provide specifics regarding how "books" will be leveraged to increase student proficiency.</p> <p>The applicant does not explain how the Chinese textbooks will align with the NCSCOS. Many aspects of instructional design are general statements and not supported with documentation or facts.</p>		
<p>Applicant needs to provide a grade level scope and sequence.</p> <p>Will families be responsible for purchasing student textbooks? If so, how will the school ensure that this will not be a barrier to enrollment for families with limited financial resources?</p> <p>How will the curriculum presented be accessible for all students? How will it be differentiated for different ability levels?</p> <p>Please provide a more detailed calendar that aligns with the mission of the school?</p>	Cande Honeycutt-Killian	Curriculum a
<p>The scope and sequence appear overly broad and ambitious. Can the applicant share the detailed curriculum?</p> <p>Are there additional program and services or do children merely read?</p> <p>Calendar lacks detail and isn't aligned to the right school year.</p> <p>Are students required to pay for textbooks? How are the needs of families from low-income or low wealth backgrounds addressed?</p>	Nicole Charles	Curriculum a
<p>US has laws that protect Exceptional Children and persons with disabilities. Public schools must adhere to these laws.</p>	Sherry Reeves	Special Prog
<p>The applicant does not cite a sound plan and clear systems to support At-Risk students. Many platitudes and ideas are listed without a clear plan to assist students who may need the most support.</p>	Greg Schermbeck	Special Prog
<p>Where is the clear plan and system for intervention? This question was used as a vent-session, rather than actually answering the question at hand. Are the applicants stating that they will take this same approach, or are they wanting to adapt this model for this school to fit an American audience?</p> <p>Can the applicant provide justification for offering academic opportunities to AIG students, but not acutely responding to those who require intervention? Specific, education and doctoral references would be highly encouraged in this area.</p>	Douglas Price	Special Prog
<p>Applicant needs to clarify: Rationale and detail is provided about methods in China, however, there is no clear outline of exactly what the school will do to identify, prevent an support all students.</p>	Kristen Parker	Special Prog
<p>Plan is vague and does not specifically address at risk students. How are interventions utilized and progress monitored to determine the effectiveness.</p>	Glenn Allen	Special Prog
<p>Is there an actual plan or system beyond the analogies?</p> <p>Is the applicant clear about 504 versus an IEP process?</p> <p>Is the applicant prepared for ELL students?</p>	Nicole Charles	Special Prog
<p>Applicant needs to provide clear details and plan for ensuring at-risk students are being identified and served.</p> <p>Applicant needs to provide details for serving ELL students.</p> <p>Applicant needs to address academic opportunities for gifted students.</p>	Cande Honeycutt-Killian	Special Prog
<p>The applicant lists general strategies. It is unclear if the applicant understands state and federal requirements.</p>	Greg Schermbeck	Exceptional
<p>Applicant needs to specify how they will ensure they will follow the Child Find process.</p>	Cande Honeycutt-Killian	Exceptional

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Applicant needs to provide sufficient details to demonstrate understanding of state and federal requirements regarding identifying children with disabilities.		
What is your child find process? You have identified what you will do if a referral is received but nothing about the process used prior to referral. The 504 process is a regular education process and should not be confused with the IEP process.	Glenn Allen	Exceptional
Is it common practice to denote EC status on the enrollment form or during the admission interview?	Steven Walker	Exceptional
Does the applicant plan on using a child find process?	Nicole Charles	Exceptional
Is the applicant aware of the alarming nature of the admission interview in identifying exceptional students?		
The applicant provides general strategies and also cites that the Chinese educational model (which they plan to follow) does not leverage EC teachers. Thus, it is not clear if the applicant will follow FAPE and related regulations with fidelity.	Greg Schermbeck	Exceptional
Applicant mentions several times that there is no EC in China. Therefore it makes one wonder if school will adhere to EC laws and practices with integrity. EC teachers should not be tasked with writing/implementing 504 plans.	Sherry Reeves	Exceptional
Applicant needs to demonstrate that they will provide FAPE and will provide the full continuum of services for children with disabilities.	Cande Honeycutt-Killian	Exceptional
Are there strategies beyond the generalized ones listed in the here? It is unclear if the applicants understands federal and state requirements for varying settings including planning for pull-out, separate settings, and growth for students with I.E.Ps.	Nicole Charles	Exceptional
If the Chinese model is proposed but does not generally accommodate for exceptional students, can this model be used in this country given the laws?		
The full continuum of service also includes a separate setting. A students IEP would contain information about necessary accommodations and modifications. It appears there is some confusion between the two.	Glenn Allen	Exceptional
Applicant needs to clarify: How will EC students advancement towards goals be monitored other than through state aligned practice tests?	Kristen Parker	Exceptional
Applicant needs to clarify: It is stated in the application that "CES will try to offer EC students a full continuum of services.." Why would this not occur?		
Is this school committed to offering EC services, the way that they should be, as a public education institution? I am concerned that this school might not have a commitment with FAPE; most of this section (and the one above) is spent comparing models of China vs. USA, emphasizing that China does NOT offer many of the things that USA does.	Douglas Price	Exceptional
I'm not sold that the school is going to provide EC services in compliance with state and federal law.	Steven Walker	Exceptional
Which students are considered special needs? Special needs are vast and cannot be addressed in one strategy. Are there policies and standards to address the varying needs?  What is the evaluation tool?  What is offered in terms of remediation?  Why are the graduation requirements not aligned with NC standards if the base curriculum is that of the local LEA/Wake?  Will probations for poor performance be reflected in the students record?	Nicole Charles	Student Perf
The applicant does not provide specifics regarding how evaluation tools or assessments will drive data-based instruction.	Greg Schermbeck	Student Perf
Applicant needs to clarify: How will progress for students be shared with families and stakeholders?  Applicant needs to clarify: If a student is completing the same retest, is that really showing their mastery of the content?	Kristen Parker	Student Perf

Carolina Experimental School - Carolina Experimental School evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Applicant needs to clarify: What will grades K-2 be assessed on if there is no EOG? What is this "probation" period for a student; what does it look like?  What barriers are in place for HS students who place out of the HS courses offered, and the next step are college courses? How will the school establish that the student is placed in appropriate school courses and that they are attending?  What does "being retained conditionally" mean?	Douglas Price	Student Perf
What are the specific assessments that will be used?  How will the school utilize the IEP for performance standards for students with disabilities?  Applicant needs to clarify what "retained conditionally" means.  State standardized tests cannot be the only metric for promotion.	Cande Honeycutt-Killian	Student Perf
Students must engage in self-remediation if he/she falls below standard.	Sherry Reeves	Student Perf
The plan mentions students with special needs but does not specifically address students with disabilities. Special needs cover a broad spectrum.	Glenn Allen	Student Perf
What further research can be provided to support the use of the Chinese model of discipline and intrinsic value? Can other research outside of Chinese models be provided to support the same statements/arguments?	Douglas Price	Student Cond
Applicant needs to clarify: More detail about the Honor system needs to be detailed and explained how it will support a safe environment for all students.	Kristen Parker	Student Cond
This plan is a little light on details and I'm not sure that the due process provisions that are required by law are fully comprehended.	Steven Walker	Student Cond
The applicant cites general statements "Chinese schools have fewer behavior incidents" without providing data and documentation.  The applicant also fails to lack a clear plan to drive a safe student culture and system.	Greg Schermbeck	Student Cond
Applicant needs to provide additional clarification beyond what is given for student discipline. What research supports that these methods would be effective for American students?  While students with disabilities are mentioned, it is not clear that the board has an understanding of the legal requirements of the discipline of students with disabilities.	Cande Honeycutt-Killian	Student Cond
The narrative mentions the IEP involvement in the discipline process but does not mention having to provide services even if the behavior is determined to be a manifestation of the disability. I would encourage the applicant to revisit Policies Governing Services for Children with Disabilities.	Glenn Allen	Student Cond
Is there data to support that claims regarding discipline?  Although offenses and consequences are listed, are there policies for discipline?  The applicant should clarify how student conduct will align with the mission beyond the reliance on students' "self-discipline".	Nicole Charles	Student Cond

Reviewer	Score
Deanna Townsend-Smith	
Sherry Reeves	Fail
Tammi Sutton	
Greg Schermbeck	Fail
Steven Walker	Fail
Robert McOuat	
Douglas Price	Pass
Kristen Parker	Fail
Glenn Allen	

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Phyllis Gibbs	
Nicole Charles	Fail
Cande Honeycutt-Killian	Fail
Anthony Helton	Fail

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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:* Carolina Experimental School

*Mailing Address:* 4112 Collamer Dr

*City/State/Zip:* Cary NC 27519

*Street Address:* 27519

*Phone:* 919-930-9125

*Fax:*

*Name of registered agent and address:* Wenyu Bai, 4112 Collamer Dr, Cary, NC 27519

**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)  
 No

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

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

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

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

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



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

g Zhao			ogy		
Bo Shao Wallace	Vice Presid ent	ORANGE	Cooperate Finance		
Yuling Wang	Treasu rer	WAKE	Education		
Yiyi Jiang	Secret ary	WAKE	Education		
Wenyu Bai	Presid ent	WAKE	Teacher		
N/A	N/A		N/A		
N/A	N/A		N/A		

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

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

The school board is the governing body of the school, and the Director reports to the board. The Boards major functions are planning, policy making, hiring the Director, monitoring, and advising, The Boards primary duties are:

- Hire, support and evaluate the Director
- Determine the compensation for the Director and the pay scale of the school
- Approve personnel decisions
- Work with the administration to develop short- and long-term strategic plans for school growth, success, and sustainability
- Support the Director in carrying out the school's mission
- Develop and abide by the schools bylaws
- Develop or approve the schools policies
- Approve major financial decisions (i.e., school facility, expensive equipment)
- Monitor the schools financial health
- Monitor the schools compliance with laws and policies
- Advocate for the school
- Be well informed about relevant Charter School Laws and NCDPI policies and comply with these laws and policies
- Comply with NC Open Board Meeting Laws (NC Statutes: Chapter 143, Article 33C; G.S., 143:318)
- Avoid conflicts of interest and put the schools welfare before personal benefit

Roles of board members include: Board Chair, Vice Chair, Secretary, and Treasurer. Additionally, board members will participate in subcommittees such as Budget and Audit, Facilities, Development, and Community Engagement.

Educational reform is a major mission for Carolina Experimental School, and CES learns from top performing countries so the Director has to be reform-minded with a global vision. CES is experimental in nature so it is likely that teachers only know about some of CESs curriculum, programming, instructional approaches. Staff development is critical for the success of CES. The Director has to have deep understanding of what makes top performing countries successful and what makes American students

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

underachieve, how talents are developed, what great books are inspiring for teenagers, how to cultivate autonomous learners. Educators from China, educators in gifted education, educators from other educational reform movements (e.g., E. D. Hirschs Core Knowledge, the Great Books, classic education) have expertise in some of CESs programming so these reforming groups are recruiting sources for us. Positions will also be posted on educator recruiting sites. Candidates will submit writing samples as analytical skills and originality are critical for this reformer position. A search committee comprised of board members, administrators, and teachers will screen resumes and recommend three or four candidates for on-site interviews. Candidates invited to the school will meet with board members, administrators, and teachers, and there will also be a presentation and a Q & A session open to all the stakeholders (e.g., parents, students, faculty). Stakeholders will evaluate the candidates through a survey. The search committee will recommend a candidate for hire with the input from stakeholders. The Board will review the Directors performance twice a year: one in December and another in June. The Director will be evaluated by measures such as student testing performance, school ranking, students achievements in competitions, students motivation, and school culture.

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

The Board will have a no less than five and no more than nine members. Currently, there are five board members: one cooperate finance analyst, one scientist, and three K-12 educators. All the five members have doctoral or terminal degrees (e.g., MBA, M.D.). Board members should have diverse experiences and areas of expertise. Current board members have expertise in educational planning, educational leadership, educational policy, curriculum and instruction, gifted education, special education, philosophy of education, math education, reading education, foreign language education, early childhood education, financial forecast, management accounting, income tax preparation, biotechnology, and clinical medicine.

The Board has the following powers and duties have:

- Selecting, supervising, and evaluating the Director and holding him or her accountable for achievement of the School's mission and goals
- Approving personnel decisions
- Developing and approving school policies
- Approving and monitoring a balanced budget
- Reviewing financial statements monthly
- Contracting an auditor for the annual financial audit

The current board members all were born in China and had their K-12 and college education there. Since CES intends to adopt Chinas best educational practice in teaching basic skills, this board composition will ensure the fidelity of the learning process. It will help the school maintain a clear vision and a strong leadership. The board members expertise in education, finance, and accounting will ensure that the school has effective educational programming and instruction and maintains financial stability. The board members Chinese background also makes them know what students and the school are able to achieve. The board members have the expertise to

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

evaluate the school Director in the areas of budgeting, finance, planning, student performance, curriculum and instruction. Two or more board members can be added to achieve more diversity and representation when needs arise. Four board members are parents, and two of them will have school age children when the school starts. Having parents on the board will make it convenient for parents to express their concerns and wishes.

- 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?*

Since CES intends to adopt China's best educational practices, the founding board members were recruited among the Chinese community in the Triangle. The lead applicant sent an email to the email list of The Chinese-American Friendship Association of North Carolina (CAFA). A dozen people expressed their interest in being a board member. People with desired expertise (e.g., K-12 education, finance, STEM) for the board became the founding board members.

If a position is vacant, election will be held at the next board meeting. All officers may serve no more than two consecutive two-year terms. Former officers, after a break in service of one year or more, may be elected to another term as an officer. All outgoing board members who have not finished their terms are expected to identify potential replacement board members and initiate that contact prior to resignation. If a board member must resign or is dismissed, s/he will be asked to identify potential candidates for discussion at the next board meeting.

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

The Board will meet monthly at night or on the weekend each year. If no enough matter is on the agenda, two meetings during vacations may be canceled (e.g., December and 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.*

New board members will receive training on laws related to school boards, school finance, and education (e.g., CES's philosophy, mission, and educational model, China's education, NC and American students' achievement data).

New board members are required to watch some Youtube videos on school board member training.

- A Michigan school districts board training (<https://www.youtube.com/watch?v=IC2oSajSf9U> & <https://www.youtube.com/watch?v=iaaSo55glII>)
- What Makes a Good School Board Member? (<https://www.youtube.com/watch?v=pFhyJMVclQs&index=6&list=PLD7E08C7FA9261C09>)
- The Key to Great Schools is Great Boards (<https://www.youtube.com/watch?v=-dQFkhRFH9Q>)

New board members are required to read the following laws and policies:

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

- NC charter school law (Article 14A)
- NC Open Meetings Law (Article 33C).
- State Board of Education Charter Schools Policies
- NC Financial Guide For Charter Schools

Here is a timeline for ongoing professional development activities for board members:

October 2016: Review E.D. Hirsch's *The Schools We Need and Why We Don't Have Them*

Nov 2016--Jan 2017: Visiting other charter schools (e.g., KIPP Durham, The Hawbridge School, Woods Charter).

January--March 2017: Watching videos comparing the Chinese and the Western educational systems.

- A four-episode Danish documentary comparing a Danish school and a Chinese school ([https://www.youtube.com/watch?v=Z\\_WSJUNxPZc](https://www.youtube.com/watch?v=Z_WSJUNxPZc))

- *Are Our Kids Tough Enough: Chinese School*, a BBC documentary following five Chinese teachers in the UK (<https://www.youtube.com/watch?v=DYGxAwRUpaI>)

- *Chinese teaching methods shock British schoolchildren* (<https://www.youtube.com/watch?v=qQg94Rs01DM>)

April 2018: Review Amy Chua's *Battle Hymn of the Tiger Mother*.

May-June 2018: School studies. Each board members will study two schools and share their findings at the board meeting about what we can learn from them (e.g., programming, curriculum, activities). These schools may include excellent charter schools (e.g., Raleigh Charter, Woods Charter, Triangle Math and Science Academy, KIPP Durham) as well as traditional schools (e.g., Enloe, Carnage). We will learn from the best and add good features to our programming.

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.*

A CES school board member shall abide by the following ethical standards:

- Abide by all laws, rules and regulations of the State Board of Education.
- Make decisions for the educational welfare of children.
- Confine board action to policy making, planning, and evaluation, and leave administering the school to school administrators.
- Not to make personal promises or take any private action that may compromise the board.
- Not to use the schools for personal gain or for the gain of friends.
- Maintain the confidentiality of board decisions when required by the Board.

We do not know of any existing relationships that could pose actual or perceived conflicts of interests if the application is approved. The Board will follow the conflict of interest policy in the NC Charter School Financial Guide Section VII. It will take the following steps to avoid conflict of interests.

- Each year board members are required to sign a statement to confirm that s/he has received the conflict of interest policy; has read and understands the policy; and has agreed to comply with the policy.

- When a major financial decision (e.g., facility, furniture, equipment, laptops, custodian service, food service) is made, board members are

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

required to disclose if they have connections to the vendors or bidders. If a board member has a connection to the vendor, s/he shall not vote on that matter to avoid potential or perceived conflict of interest.

- Board members relatives should not be employed by the school.

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

CES will have guidelines on school matters in place during the first year of operation. It will have The Teachers Handbook, The Student Handbook, a financial manual, and other policies when needs arise. The Board will delegate most policy development responsibilities to the school but the Board will vote on the proposed policies and provide modification suggestions. The Board will take the following steps in initiating a policy:

- Gathering information: What is the common practice? What are the different perspectives? What are the needs? What is the potential impact? What is the cost?

- Discussion: Board members will share opinions, brainstorm solutions, and propose alternatives.

- Making decisions: Board members will vote on the proposed policies.

*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.*

Like most other schools, CES will have a Parent and Teacher Association (PTA), and it will also have a faculty advisory council. The PTA is the liaison between parents and the school. It communicates parents concerns and wishes to the school. It also organizes activities to show parents appreciation of teachers work. Fundraising is another function it performs to enrich the schools programming. The Faculty Advisory Council includes representatives from various subjects. Some matters can be discussed by this council and the administrators and do not have to get all the faculty members involved. Teachers can communicate their wishes and concerns to their representatives to bring to the advisory meetings.

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

**Grievance Process for Parents**

Parents and students should attempt to discuss concerns informally with people involved before going through the grievance process. There are two levels of grievance: the school level and the board level. At the school level, parents should submit a written request for a conference within ten days after the disclosure of the facts giving rise to the grievance. The Director shall grant the conference within five school days following the request. The Director shall send a written response to the parents within five days after the conference. If parents are not satisfied with the Directors response, they can appeal to the board within five school days after receipt of the Directors response. The Board will provide a final written decision within thirty days.

**Grievance Process for Employees**

If an employee disagrees with a coworker or supervisor, feels that he or she has been treated unfairly, or has other grievances, the employee may write to the Director within five days after the issue arises. The Director will investigate the employee's complaint and respond. If the employee is unsatisfied with the Directors response, he or she can write to the board within five days after receiving the Directors response. If the grievance is about the Director, the employee may write to the Board within five days

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

after the issue arises. The Board will provide a final written decision within thirty days.

### 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.*

**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.

We anticipate the following positions:

1 Director

1 Assistant Director

1 School Counselor (Year 2)

1 Finance Officer (Year 2)

1 Office Clerk (1 more in Year 3)

1 Nurse (Year 2)

2 Transportation staff (Year 3)

8 Core Content Teachers (8 more in Year 2, another 8 more in Year 3)

4 Electives Teachers (4 more in Year 2, another 4 more in Year 3)

1 Special Education Teacher (2nd one in Year 2, 3rd one in Year 3)

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

1 ESL teacher if needed

1 IT Specialist/Computer Science Teacher

1 Teaching Assistant (Year 2, two more in Year 3)

1 Substitute Teacher a day in Year 1 on average (2 Subs in Year 2, 3 Subs in Year 3)

Additionally, we anticipate that CES will need to contract with companies or professionals for the following services:

- Related EC services (e.g., speech, occupational therapy, physical therapy)
- Accounting and payroll
- Custodian
- Auditing
- Legal
- Accreditation
- Facility acquisition, design, and development
- Facility maintenance

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

Include the following information for the proposed charter school:

First, good teachers should be good students. In 2014, education majors had an average SAT Critical Reading score of 482 (46% right) and Math score of 482 (41% right) (<http://www.businessinsider.com/heres-the-average-sat-score-for-every-college-major-2014-10>). Teachers with low SAT scores may not know what it takes to achieve mastery. It is no wonder so many American students do no practice tests for EOG/EOC/ACT. Mediocre students become mediocre teachers then mediocre teachers produce more mediocre students. We have to break this vicious circle by hiring teachers with strong content knowledge. They have to have high SAT/ACT and Praxis test scores.

Second, CES's experimental nature itself will attract aspiring educators and non-educators. We will work hard to improve students' performances and let our assessment data do the talk. We will write articles, blogs, even books to explain our model and theories of education to increase the school's visibility. Hopefully, our theorizing effort will attract enough applicants to us. We will also have traditional recruiting strategies such as advertising vacancies on the school website and on teacher recruiting websites, contacting colleges.

Third, the board recognizes that we will compete not only with other schools but also with other sectors for talents so it is important to offer competitive salaries in recruiting and retaining teachers. CES will make teachers' pay comparable to Wake County's pay scale. We need to widen our revenue sources to maintain our competitive edge. Teachers can get extra pay from afterschool programs and summer camps.

Fourth, with their knowledge of best practice in the world, CES teachers will have more choices. CES will set up more schools to spread the CES model and at the same retain high-performing teachers by letting them assume leadership responsibilities.

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

Although the board has the final authority over personnel matters at CES, it delegates the duties of hiring, assignment, evaluation, discipline, promotion, and termination of faculty and staff to the Director. The board will review, approve or disapprove all employment contracts recommended by the Director. Each staff and faculty member can go through the grievance process to solve disputes. A teachers representative will attend the board

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

meeting but s/he will be a non-voting member. S/he will be a liaison between the teachers and the Board. Teachers can also serve on subcommittees of the Board (e.g., strategic planning). The Board will get teachers opinions and insights through an annual survey.

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

Hiring Procedures

- Applications are screened by administrators for appropriate experience, certification, and education
- The search committee, which includes administrators and teachers in the subject, will select 2-5 candidates for the first-round interview.
- The search committee will conduct the second-round interview, check references, and conduct a national criminal background check to make the final choice.
- The candidate chosen will get an offer of employment upon the Board's approval.

Dismissing Procedures

- An under-performing staff or faculty member will have an action plan for improvement.
- If s/he fails to make adequate progress, s/he will be dismissed.
- A staff or faculty member who has seriously violated policies outlined in The Employee Handbook will be given a warning or be dismissed. S/he can go through the grievance process to appeal to the Director and the Board.

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

SALARIES:

CES's teachers' pay scale will be comparable to Wake County School District's pay scale.

Teachers: \$40,000 or above

Average teacher assistant's salary: \$20,000

Average support staff's salary: \$20,000-\$40,000 depending upon job requirements, experience and qualifications.

Director's salary: \$80,000

Assistant Director's salary: \$50,000-\$70,000 depending upon experience and qualifications.

BENEFITS

CES employees will have medical insurance through the state health insurance program. CES will pay 80% to 95% of the premium cost if the budget allows us to do so. If CES has enough budget, we will also pay partial premium cost of dental and life insurance. CES will participate in a tax-deferred retirement plan. CES full-time employees will have a number of personal leave days that can be used for illness and vacation.

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

1) Grievance

The Board will develop a dispute resolution policy to address employees' grievances. If a school employee has a disagreement with an administrator, s/he can discuss it with the Director. If s/he has a disagreement with the Director, s/he can appeal to the Board. The Board's decision will be final.

2) Termination

North Carolina is an at will employment state. Employment with the school is



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

at will. Employment contracts are given annually to clarify employees salary, position title, and duties. Employment dates will not bind either the employee or the school to a specific time period. Both employees and the school are free to terminate the employment relationship, with or without reason. The school may give its employees the opportunity to respond to issues prior to action being taken by the Board but it does not have to go through this procedure.

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

Administrators and teachers who run before- or after-school programs will get extra pay which comes from the fees charged to the parents.

The EC Coordinator will also be the 504 Plan Coordinator. Schools do not receive funding for developing and implementing 504 plans so it is an extra duty for the EC teachers.

The Guidance Counselor or the clerk will also be the Testing Coordinator. It is funded by general funding.

*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.*

EC population is generally about 10%-15% of the total enrollment. The common practice is each EC teacher has a case of of 20-30 students. CES's Year 1 enrollment of 200 students requires a full-time EC teacher. This teacher has to be fully certified with at least two years of EC experiences. CES will pay a school psychologist per test to do psychological testing. CES will pay certified professionals an hourly rate or a package rate to serve EC students who need speech, OT or other related services. If we have EC students with high needs (e.g., autism, intellectual disability), a teacher assistant will be hired. CES adopts the Schoolwide Talent Development model so it may not need a gifted teacher position. The lead applicant has a Ph.D in Gifted Education Administration. He will provide gifted education training for all the teachers. CES will have a full time or part time certified ELL teacher depending on the number of ELL students.

*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).*

Teachers should have at least a bachelor's degree. To comply with state law, at least 50% of CES teachers will have a valid North Carolina Professional Educator's License. Talented individuals without licenses will use Lateral Entry. They will be encouraged to go through the required procedures to get regular licenses so that CES can have the quota to hire other talented individuals without licenses.

CES teachers are instructors as well as managers of students' talent and philosophical development. The manager role is what distinguishes CES teachers from traditional teachers. No matter how engaging a teacher's classes are, if her students do not use their spare time wisely and do not take the initiative for self-perfection, they will still far behind the world's top performing students.

The Director provides instructional and operational leadership. S/he will coordinate or deliver staff development. S/he should have at least a Master's Degree in administration and at least five years of teaching experience. S/he should be familiar with China's educational system, talent development, and philosophical thinking.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

The Assistant Director is the chief disciplinarian. S/he shares with the director in instructional and operational leadership. S/he should have at least years of teaching experience. Preferences will be given those who have school administration experiences.

The Guidance Counselor develops the school's master class schedule with the school leadership team and schedules students' classes. S/he will address students' social, emotional, and career needs. The Guidance Counselor should have a Master Degree in School Counseling and have a valid license. S/he should have at least three years of teaching or counseling experience.

The Finance Officer is responsible for accounting, payroll, purchasing, accounts payable, budget and financial reporting, and coordinating the annual audit. This person should have a bachelor's degree in finance, accounting or a related field, preferably with experiences in school business.

Other administrative and support personnel will be responsible for carrying out support functions as delegated to them by the Director. They should have at least two years' experience in their roles.

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

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

The director will be responsible for maintaining teacher licensure requirements. The director and the assistant director will be responsible for 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.*

CES is experimental in nature, and it has three major programs. A teacher may have expertise in one of the programs but it is less likely s/he has expertise in all the three programs so teachers need support to be successful.

#### **Mentoring New Teachers**

CES will hire at least one teacher with at least three years of teaching experience in each subject or grade level so that s/he can act as a mentor if needed. Each new teacher will be assigned a veteran teacher to get some guidance. Since some of CES's programs are new to most teachers, teachers will learn together, share their experiences, and find solutions together.

#### **Retaining Teachers**

Few schools of education have CES's programs so we have to train teachers by ourselves. It takes time to train a teacher so CES has to make efforts to retain its teachers. First, CES will match Wake County's teacher pay scale. This may be difficult in Year 1 but the surplus after Year 1 will make it possible. Second, innovation and excellence will be CES's appeal. Teachers' training in the Chinese model will make them highly effective teachers. Third, with their knowledge about the Chinese model, CES teachers are likely to become teacher trainers. CES may lose teachers this way but it is a good thing for American schools. Adopting, creating, and spreading a model is CES's educational reform mission. We can retain these teacher leaders by

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

setting up new schools and let them assume leadership roles.

#### Evaluating Teachers

How teachers are evaluated often affect what they will do in their classrooms. Current educational theories shape the existing teacher evaluation rubrics. American students' low performance can be traced back to the teacher evaluation practice and the prevailing educational theories. To improve American students' performance, we have to change the way teachers are evaluated. First, the focus should be shifted from the classroom to the home. No matter how engaged students are in the classroom, if they spend nearly 8 hours on entertainment media, they will be left behind by the Chinese students farther and farther. Second, the focus should be shifted from looks to data. The prevailing educational theories belittle book learning, rote learning, memorization, drills, testing, test preparation, lecturing, whole class instruction, rows and columns, and large class size, yet these are the very practices that make Shanghai's 8th graders outperformed American 8th graders by three years. We need to let data, rather than those educational theorists, do the talk.

#### Certification and Licensure

The Director will monitor teachers' certification status to make sure CES meets the requirements prescribed by state and federal laws. Teachers with licenses will be reminded to earn staff development credits to have their licenses renewed. Lateral entry teachers need to show their progress toward regular licenses each year.

- 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.*

We set up CES out of our dissatisfaction with American educational theories and practices. We can always find the classroom-level research supporting these theories and practices but the cross-country-level comparison research often falsifies these theories and practices so it is critical to have a global vision and throw away the dogmas. Most of CES's professional development (PD) will be conducted internally. We will develop our model and spread it to other schools to improve American education. Most of CES's PD are uniform because few people have expertise in our programs and teachers need to work together to create something (e.g., a list of modern classics). After Year 1, the founding teachers will have some common knowledge of the CES model. New teachers who have not read a book or watched a video can catch up by having a small group or individualized PD.

The core components of professional development plan include data analysis, Chinese education, critiques of American education, talent development, and the great books program.

#### 1) Data Analysis

- Teachers should be familiar with data sources such as PISA, NC Report Card, national and NC ACT and SAT scores and use them to inform their teaching and motivate their students.

- Teachers should be familiar with the conversion relationships between raw scores, standard scores and percentile ranks for major standardized tests (e.g., EOG, EOC, ACT, SAT). This knowledge will enable teachers to help students set goals.

#### 2) Chinese education.

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

3) Critiques of American education.

4) Motivation

Teachers should be familiar with theories on motivation (e.g., Maslow, growth mindset, grit, inner motivation, delayed gratification).

5) Talent Development

Teachers should be familiar with theories on talent development (e.g., deliberate practice, development of expertise).

6) Great Works

To recommend good books to students, teachers have to be well-read and knowledgeable.

*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.*

Day 1 PISA Data & the BBC's Documentary 8:30-16:00

1) Explain CES's mission and vision

2) Study the PISA data. The teachers will know the huge performance gap between American and Chinese 8th graders.

3) Watch the BBC's documentary about five Chinese teachers teaching in a British school. The teachers will observe and discuss how Chinese teachers do things differently. What works and what does not? Even with students' behavioral problems, the five Chinese teachers still outperformed the control class.

4) Discuss why the US and the UK responded differently to the PISA data. The American governments took no action, and many articles tried to explain away the huge gap (e.g., Shanghai has not tested its immigrants' children, America would perform much better without its minorities).

Day 2 The Danish Documentary

1) Watch the Danish documentary that compares a Danish school with a Chinese school and discuss how Chinese teachers do things differently. Observe Chinese students' cell phone use, behaviors, attention, collaborative learning, and projects. People tend to think the Chinese way of education stifles creativity but why do the results surprise us? The Chinese classroom is not structured to be conducive to collaborative learning but why Chinese students do better in this area too? How to explain that Chinese students do poorly in English? Compare the Chinese and the Danish parents. Compare the views of the teacher union chair and those of the special education professor. Why do American educators go to Finland, another top PISA performer, instead of China? Why do the Danish go to China instead of Finland, their Nordic neighbor?

Day 3 An Anatomy of Chinese Education

1) Discuss factors contributing to Chinese students' excellent performances then rank these factors in the order of importance.

2) China's school. The hierarchy of China's schools. School size. School culture. Do China's schools have sport teams? China's schools compete academically rather than athletically. Tracking (e.g., college-bound vs. vocational, STEM vs. social sciences/humanities vs arts). Ability grouping. Daily schedule. Long hours (e.g., 12-hour school day in 8th and 12th grades).

3) China's teachers. Their pay relative to other professions. Their extra income. Their status relative to other professions. Can non-education majors

Carolina Experimental School - Carolina Experimental School adopts evidenced best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

become teachers? No special education and school psychologists. No specialists (e.g., reading specialist).

4) China's exam system. China's long history of exams. Entrance exams-- middle school, high school, and college. Differences between China's college entrance exam and the SAT/ACT (e.g., frequencies, difficulties, consequences), and how they affect students behaviors in the two countries.

5) Textbooks

6) Homework.

7) Classroom. Row and columns. Twice the American class size. Home classroom as a competing unit.

8) Factors or non-factors. Given a list of factors (e.g., class size, funding, testing), teachers will determine which factors affect student performances and which do not.

Day 4 An Anatomy of American Education.

1) Discuss E.D. Hirsch's The Schools We Need and Why We Don't Have Them.

2) Discuss Generation M2: Media in the Lives of 8- to 18-Year-Olds by the Kaiser Family Foundation

3) Discuss A Nation at Rest: The American Way of Homework by B.P. Gill & S.L. Schlossman

Day 5 NC Report Card

1) Discussing Battle Hymn of the Tiger Mother by Amy Chua

2) Compare the Triangle schools' SAT/ACT scores. Compare SAT/ACT scores in 50 states.

3) Our competitors' (e.g., local schools, other charter schools, top NC schools) EOG/EOC passing rates.

Day 6 Talent Development

1) Discuss Outliers: The Story of Success by Malcolm Gladwell

2) Article on giftedness and talent development

Day 7 Great Books

1) The Great Books Program

2) Modern classics. Teachers will go through the bestseller list during the past 50 years to find books that can be recommended to CES students.

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.*

Teachers will report to work eight days prior to the first day of school, and seven of these days (49 hours) will be used for professional development.

Non-students teacher work days can be used for professional development. There are no early release days in the school calendar because those are not convenient for working parents. CES faculty will meet twice after school each week: One for professional development and the other for staff meetings. At the weekly one-hour long professional development session, teachers will receive training, share experiences, or discuss books. The weekly staff meeting day will be devoted to whole school meetings, grade level professional learning community (PLC) meetings, subject PLC meetings, and other meetings. In total, there will be more than 100 hours of professional development each year.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

### **Enrollment and Marketing:**

- Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.218.45(a-i) carefully.

### **Marketing Plan**

*Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflects the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).*

We will comply with the charter school statute regarding admissions GS 115C.218.45 and not limit admission to students on the basis of "race, creed, national origin, religion, or ancestry." We plan to set up CES in Cary or Apex. According to the 2010 Census, the Cary residents were 73.1% White, 13.1% Asian, 8.0% African American, and 7.7% Hispanic. The Apex residents were 80% White, 7% Asian, 8% African American, and 7% Hispanic. If certain ethnic groups are significantly underrepresented among the applicants, we will make effort to target those groups. We will use multiple media such as website, emails, social media, radio, meetings, and print to reach potential students.

Waiting and Preliminary Planning Period Sept., 2016-August 2017

- Create the school website as early as possible. Viewers will be able to know about CES's mission, philosophy, programming, curriculum and instruction.

- Create a Facebook page for CES.

- Post or publish analyses of American and Chinese education to draw attention to the school.

- The 2015 PISA data will be available in late 2016. We will post or publish our analyses of these data to let the public know the effectiveness of the Chinese model and attract them to the school adopting such a model.

Planning Period after the Charter Approval: Sept-Dec. 2017

- Update the website and create an online application form.

- Send emails to the email lists of ethnic organizations introducing the CES Model and inviting applications

- Advertisements will be posted at high traffic areas such as local libraries, shopping centers, supermarkets, gas stations, thrift shops, and churches.

- An education blog will be maintained to attract parents who are curious about foreign and innovative education.

Student Enrollment for the 2018 19 School Year: Jan-March, 2018

- We will have information sessions about CES at local libraries.

- The lottery will be done between March and June.

First 20 Days of School

- If some students transfer to other schools, CES will contact the applicants on the waiting list if there is one.

First Semester of School

- CES will have an open house on 12/12/2018 and will run the ads on WUNC

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

during rush hours for 10 business days.

Open Enrollment for the 2019 2020 School Year: Jan-March, 2019

- CES will add 3rd -5th grades in Year 2 and 6th grade students will be new to the school too so it needs 200 students.

- School tours in January 2019

- Shadowing day in February 2019. Applicants have the opportunity to sit in CESs classrooms to see if it is a fit for them.

- If there are not enough applications, then the 2nd open house will be conducted on 2/13/2019.

- The lottery will be done on 3/13/2019.

## **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.*

If our application is approved, we will start to communicate with parents to develop the school's applicant base. First, we will create the school's website to post information about the school (e.g., mission, educational plan, enrollment, contacts, needs). Second, we will spread news about the school through social media and community discussion (e.g., Raleigh's city-data forum). We will inform parents and the community about our needs (e.g., finding a school facility, hiring teachers, recruiting students, purchasing low cost equipment). Third, we will have information sessions at local libraries, or set up desks and posters at shopping centers to spread the news about the school.

As a start-up, CES will compensate for the school's lack of resources by asking parents to offer help. Parents are recommended to donate time, money, or materials to the school. Parents will list their expertise and the services they can provide on the family information form. Parents can tutor students, troubleshoot computer problems, chaperone students on field trips, distribute lunch, make copies, and direct morning and afternoon traffic. CES's many competitions will need parents to play some coaching and mentoring roles. Parents will also be invited as guest speakers and judges. CES will organize a parent tutoring network to help students with needs. Parents can donate microwave ovens, furniture, school supplies and other materials to help the school save money. Parents will donate unwanted stuffs to the school's annual yard sale to raise funds. There will also be a silent auction each year to raise funds for the school. Parents can donate items for auction.

The board members' contact information will be posted on the website. Parents can communicate their concerns and wishes directly to board members. The PTA will serve as a liaison between parents and administrators, and between parents and teachers.

CES will provide several opportunities for parents to have face-to-face talks with teachers. The school will have an open house night before the new semester. On two days in early November parents can schedule a 10-minute or a 15-minute talk with each teacher to discuss students' performance in the 1st quarter. In June, there will also be a cook out for parents, students, and teachers to have some casual talks.

At the end of the school year, parents will complete an anonymous survey so

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

that the school can know the parents' needs and expectations and evaluate the school's performance in meeting parents' needs.

Focusing on students' afterschool development is CES's unique feature. The school needs parents' support in facilitating students' maximum personal growth. Teachers are expected to communicate with parents weekly to monitor students' time use. A parenting forum will be held monthly for parents to share parenting practices and tips, and discuss parenting books.

## **Admissions Policy**

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

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

1. For the first year, if we secure a facility early, open enrollment application will begin on February 12 and close on March 30. Parents can complete online or paper applications. If there is a delay in securing a facility, the enrollment deadline may be postponed to early June.

2. A lottery will be needed if there are more applications than seats available in a grade level. A lottery will be held two weeks after the open enrollment ends. The lottery ticket will include a number, applicant name, grade level and sibling indication. CES will give enrollment preference to the applicant children of board members and full-time school employees. Parents will receive lottery tickets one week before the lottery. Applicants winning the lottery will receive an offer.

3. An applicant whose name is drawn after all open seats are filled will be placed on the wait list. If a ticket indicating siblings is pulled, each child will be placed in the next available slot in their grade level. When there is an opening, CES will offer the open seat to the next child on the wait list. Applicants on the wait list will be considered first then applicants who applied after the close of open enrollment will be considered. Applications received after the close of open enrollment are ordered on the wait list according to the date received. A withdrawal form needs to be completed if an applicant wants to withdraw from CES. When CES receives a records request from the students new school, CES will send the records as requested. CES will offer the withdrawn students vacancy to the next applicant on the wait list. Parents may withdraw or transfer students at any time, and the students records will be forwarded to the new school. If a student leaves the school and wants to re-enroll at the school, a new application has to be submitted and the student will be placed on the waiting list.

4. CES does not have mandatory pre-admission activities but it does have admission interviews, school tours, shadowing, open house, and orientation. At admission interviews, school administrators explain the schools



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

philosophy of education and programming to families so that they have the opportunity to know if the school is a good fit for them. Students can take classes at CES for a day to see if they want to be here.

### **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.*

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**PROJECTED ENROLLMENT**

**2018-19 through 2022-2023**

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Wake County Schools

LEA #2

LEA #3

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

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000	LEA 920	LEA 000	LEA 000
Kindergarten	0	0	0	0	0	0	50	0	0	50	0	0	50	0	0
Grade 01	0	0	0	0	0	0	50	0	0	50	0	0	50	0	0
Grade 02	0	0	0	0	0	0	50	0	0	50	0	0	50	0	0
Grade 03	0	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 04	0	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 05	0	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 06	50	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 07	50	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 08	50	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 09	50	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 10	0	0	0	50	0	0	50	0	0	50	0	0	50	0	0
Grade 11	0	0	0	0	0	0	50	0	0	50	0	0	50	0	0
Grade 12	0	0	0	0	0	0	0	0	0	50	0	0	50	0	0
	200			400			600			650			650		

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<b>Section IV: Governance and Capacity Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
N/A	Greg Schermbeck	Tax-Exempt S
501(c)(3) is not required at this time.	Cande Honeycutt-Killian	Tax-Exempt S
<p>Applicant needs to provide a more detailed organizational chart.</p> <p>There are no board members with school leadership experience. How will the board recruit additional board members to ensure that the primary areas and skills are covered?</p>	Cande Honeycutt-Killian	Governance a
<p>An organizational chart is attached but rather confusing. Youtube videos may not be the best expectation to set for board development and training.</p>	Greg Schermbeck	Governance a
<p>The organizational chart is not clearly teased out. Can the structure be clarified and the roles for faculty/staff, PTA, and parents be described in more detail?</p> <p>Why are the board members not all on the same page and in congruence with the responsibilities listed in the application?</p>	Nicole Charles	Governance a
Not applicable.	Douglas Price	Proposed Man
N/A	Greg Schermbeck	Proposed Man
The school will not contract with and EMO/CMO.	Cande Honeycutt-Killian	Proposed Man
CES is not proposing to use a EMO/CMO	Nicole Charles	Proposed Man
<p>The applicant does not provide a clear recruitment or retainment plan for high-performing teachers. It merely states that the school will attract candidates itself. The applicant provides basic and minimal procedures to ensure quality staff.</p>	Greg Schermbeck	Staffing Pla
<p>Missing several key positions in year 1 (counselor, nurse, finance officer, transportation staff). Clerk cannot be Testing Coordinator.</p>	Sherry Reeves	Staffing Pla
<p>Solid plan for recruiting and retaining high quality teachers is not given.</p> <p>The board cannot delegate authority for hiring to the Director. Only the board may hire and fire employees.</p> <p>Wake County offers a supplement to the state salary. How will this school be comparable without the supplement?</p> <p>It is recommended that the EC Coordinator does not also coordinate Section 504.</p>	Cande Honeycutt-Killian	Staffing Pla
<p>Does "hopefully... will attract enough applicants" suffice in terms of recruitment? Given the high standards and unique methodology required for CES's curriculum, are there other strategies required to attract the right talent?</p> <p>Who is hired first: teachers or administrators? Both are required for hiring and the board has allocated the responsibility of hiring teachers to the director but the hiring of the director requires teacher/parent input.</p> <p>Can student performance truly be traced back to teacher evaluation practices? Is one director enough to do all of the required evaluations for the entire staff given that the assistant handles discipline?</p>	Nicole Charles	Staffing Pla
<p>Applicant needs to clarify: Will not allowing teachers who do not have high ACT/SAT scores put the school at a disadvantage for hiring teachers? What is considered a high SAT/ACT score?</p> <p>Applicant needs to clarify: Wouldn't it be considered discrimination to not hire someone with an average ACT/SAT score, however, they are qualified in other ways for the job?</p>	Kristen Parker	Staffing Pla

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p>Is a 7 day professional development for a unique school structure enough given potential recruitment challenges?</p> <p>is the rigorous evaluation proposal manageable and productive in terms of student outcomes?</p>	Nicole Charles	Staff Evalua
<p>Applicant needs to clarify how staff will be trained to implement the methods presented in the Education Plan and Curriculum.</p> <p>Applicant needs to provide specific evaluation practices for teachers.</p>	Cande Honeycutt-Killian	Staff Evalua
<p>The Staff Evaluation and Professional Development plan lack detail. General strategies are provided but it is unclear how they align with the proposed school budget and how they will drive student performance.</p>	Greg Schermbeck	Staff Evalua
<p>Applicant needs to clarify: How will teachers be trained in the instructional methods as proposed in the school mission and throughout the application?</p> <p>Applicant needs to clarify: What specific training and benefits will teachers receive at CES so that teachers will stay around for a long time?</p> <p>Applicant needs to clarify: Information is provided about what needs to change but there are no specifics about how teachers will be evaluated. What is the specific evaluation method for teachers? How and when will they be evaluated and by whom?</p> <p>Applicant needs to clarify: What is the timeline for teachers learning all the core components to teach students?</p>	Kristen Parker	Staff Evalua
<p>Applicant needs to provide additional details on marketing to ensure a diverse population of students. Since the educational need section was weak at best, the school would rely upon a well-thought marketing plan to fulfill projected enrollment.</p>	Cande Honeycutt-Killian	Marketing PI
<p>Creating a website and Facebook page may not be enough to ensure the school meets its projected student enrollment.</p> <p>This section lacks great detail.</p>	Greg Schermbeck	Marketing PI
<p>How is the budget going to accommodate for all of the needs outlined in the application? Are parents a reliable source of income for a publically funded school?</p>	Nicole Charles	Marketing PI
<p>Can CES engagement strategy share times to highlight how practical the proposed strategies are? Will involvement opportunities be culturally relevant?</p>	Nicole Charles	Parent and C
<p>Other than the PTA, donations, and website offerings, what does this school plan to offer in ways of parental engagement? How can parents be further encouraged to "buy-in" to the schools idea, mission, and goals.</p>	Douglas Price	Parent and C
<p>The plan focuses on parent donations and support but fails to provide a plan for parent and community engagement which goes much deeper than monetary resources.</p> <p>Applicant needs to revise plan to include engagement.</p>	Cande Honeycutt-Killian	Parent and C
<p>This plan lacks detail. It is also unclear how the school will respond if parents and the local community are not able to donate money or time.</p>	Greg Schermbeck	Parent and C
<p>Applicant use of language "lottery tickets" and "winning the lottery" seems odd. Enrollment preferences are vague and lack detail. Sibling preference needs clarification. Will there be sibling preference? If so, what will that process look like? What if student/family does not complete admission activities such as the open house? Will the child be denied enrollment? How is this not posing a barrier?</p>	Cande Honeycutt-Killian	Admissions P
<p>Are the admission interviews, school tours, open houses and orientation mandatory or optional?</p> <p>When can new students take the day of classes given the indicated lottery dates? Are the days for students in year two and beyond only?</p> <p>Are there re-enrollment preferences for students studying abroad?</p> <p>Will staff and board member children receive preference or is there a cut-off?</p>	Nicole Charles	Admissions P
<p>Is it realistic to assume that all students will come from Wake County only? If the educational quality is above average, is it reasonable to assume that students from Durham or even Orange County (and whose parents may work in Wake) could also apply?</p>	Nicole Charles	Projected St

Carolina Experimental School - Carolina Experimental School adopts best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Will CES be able to attract the projected number of students willing to adhere to CES's philosophy?		
Applicant failed to provide evidence of support or need for this school.	Cande Honeycutt-Killian	Projected St
The applicant should provide reasoning to start in 6th grade, then add 5th grade and 10th/11th grades in year 2.	Greg Schermbeck	Projected St
Not applicable	Douglas Price	Weighted Lot
The school is not using a weighted lottery.	Cande Honeycutt-Killian	Weighted Lot
N/A	Greg Schermbeck	Weighted Lot
CES does not indicate the use of a weighted lottery	Nicole Charles	Weighted Lot
No weighted lottery even though applicant states if "certain ethnic groups are significantly underrepresented...we will make effort to target these groups."	Sherry Reeves	Weighted Lot

Reviewer	Score
Nicole Charles	Fail
Douglas Price	Pass
Deanna Townsend-Smith	
Robert McOuat	
Steven Walker	Pass
Kristen Parker	Pass
Sherry Reeves	Fail
Anthony Helton	Pass
Phyllis Gibbs	
Greg Schermbeck	Fail
Cande Honeycutt-Killian	Fail
Glenn Allen	
Tammi Sutton	

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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.*

CES will make every effort to make transportation not a barrier to attending the school. Carpooling is the primary means of transportation at the early stage of the school. CES will help parents identify carpool options by creating a carpool list.

CES will have a tight budget in Year 1 but it will be able to set aside a bus fund of \$30,000 each year after Year 1 to build up the capacity to buy school buses. Hopefully we will have one or two bus lines starting in year 3. The Highway 55 line will go from the RTP to Holly Springs, and the High House line will go from Highway 55 to Walnut Street.

**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.*

Whether CES will have a cafeteria depends on the school building we can find. If there is no cafeteria, the commons, classrooms, and courtyards will be used as lunch locations. Microwave ovens will be purchased or donated for students to use. Due to limited spaces and limited numbers of microwaves, CESs elementary, middle, and high schools will have different lunch time to avoid congestion. One to three restaurants will be contracted to deliver boxed lunch. The prices should range from \$3 to \$8 so that low income students have some choices. The foods are expected to be nutritious. Students will place their orders in the morning. Due to a tight budget, CES may not be able to provide a lunch subsidy in Year 1 but it will set aside a lunch fund of \$20,000 in Year 2 and \$30,000 after Year 2. It will be used to subsidize low-income students lunch. This fund may help 40-60 students each year. The amount of lunch fund may increase or decrease depending on the actual needs.

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

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

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

Area of proposed coverage	Proposed amount of coverage	Cost (Quote)
---------------------------	-----------------------------	--------------

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Comprehensive General Liability		\$1,000,000	\$1,365.00
Officers and Directors/Errors and Omissions		\$1,000,000	\$4,380.00
Property Insurance		\$1,000,000	\$1,300.00
Motor Vehicle Liability		\$1,000,000	\$2,300.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other		\$888,000	\$5,355.00
Total Cost			\$15,032.00

\*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.

800school                      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.*

A building has not been identified yet. The Board plans to lease a building at least in the first two years in western Wake County(e.g., Apex, Cary, Holly Springs, Morrisville) and here is the plan to obtain a building:

- Find a facility vacated by another school
- Monitor loopnet.com and other websites for commercial real estate
- Find a commercial real estate or office building that can be converted to classrooms

The school building should meet the following requirements:

- At least 50 square feet per student
- Meets local and state building fire/safety codes
- Has adequate parking spaces
- Has room for expansion
- If it is part of a building, there should be separate entrances for the

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.  
school.

The Board will take the following steps to secure a facility:

July-Oct 2017: Site selection

Nov-Dec 2017: Room layout design. Lease signed.

Jan-Feb 2018: Plans and permits submitted and approved

Feb-June 2018: Construction

July 2018: Certificate of Occupancy and other regulatory approvals.

*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 per square foot lease rate will be \$10-\$25/sq. This is comparable to the commercial real estate lease rate in Cary.

**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.*

CES starts with 200 students with facility searching and funding in mind. Having 400 or 600 students will reduce the school's flexibility in leasing a facility though it will make buying or constructing one possible with more funding. In case that we are unable to find a facility on time, we have the following contingency plans:

- 1) Inform the Office of Charter Schools and get an approval to delay the opening.
- 2) Inform the OCS and get an approval to adjust the enrollment numbers. For example, if we can only find a facility that can hold 100 students, then we may have 7th and 8th grades only or still have 6th-9th grades but only have 25 students in each grade.
- 3) Broaden the facility search to include other areas (e.g., Raleigh, Fuque-Varina) and other types of use (e.g., church, factory).
- 4) Buy or lease a rural lot to have some mobile classrooms.

<b>Section V: Operations Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
What happens if carpooling is not convenient nor an option for a set of parents?	Douglas Price	Transportati
Years 1 and 2 transportation plan is carpooling. Buses to be added in year 3. This may pose a hindrance to some families.	Sherry Reeves	Transportati
Applicant needs to clarify: How will carpooling ensure that all students have the opportunity to attend your school? What if there are students who cannot carpool?	Kristen Parker	Transportati
How will transportation be provided to those students with transportation identified as a related service on their IEP?	Glenn Allen	Transportati
Does the transportation policy consider hardships for parents without cars or families with unique challenges?	Nicole Charles	Transportati
How will CES address the needs of students whose IEP requires transportation?		
The applicant does not provide specific transportation plans to ensure all children will have access to transportation.	Greg Schermbeck	Transportati
Applicant needs to provide clear plan that demonstrates that transportation will not be a barrier for families. Applicant needs to clarify how transportation will be provided for students with disabilities that has transportation as part of the IEP.	Cande Honeycutt-Killian	Transportati



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

How will the board ensure that no child goes hungry in Year 1, regardless of subsidies and funding?  How will the Board respond if more low-income families apply and are entered into this school, than anticipated?	Douglas Price	School Lunch
Unacceptable lunch plan. Not even close.	Steven Walker	School Lunch
The applicant does not provide specific school lunch plans, specifically for students who may qualify for free / reduced lunch.	Greg Schermbeck	School Lunch
No subsidy in year 1; vendor meals projected to cost \$3 to \$8. How will students who qualify for F&RL pay for their lunches with these price points?	Sherry Reeves	School Lunch
Applicant needs to clarify how it will ensure that no child will go without lunch especially for low-income families.	Cande Honeycutt-Killian	School Lunch
How will students who would qualify for free or reduced lunches be able to participate in a lunch program that will cost \$3 to \$8 a day? Is breakfast included given the amount of time dedicated to in class time (see schedule)?  How does the school define low income?  How will CES prevent students from feeling stigmatized and/or lacking options under the proposed plan?	Nicole Charles	School Lunch
Applicant needs to clarify: How will you ensure that students who qualify for free/reduced lunch will receive this opportunity?	Kristen Parker	School Lunch
There is no contact information for the insurance company listed. The logo appears different on the website.	Nicole Charles	Civil Liabil
Not signed by board chair.	Sherry Reeves	Healthy and
What is the contingency in the event no building can be secured?  What is the realistic and practical plan for CES as it grows?  What is the capital project plan and how can the money be raised?	Nicole Charles	Facility and
What if there are no vacated school facilities? Does the board have a specific space in mind?  Contingency plan is weak. Applicant needs to provide a strong, viable contingency plan.	Cande Honeycutt-Killian	Facility and
The applicant does not provide enough information regarding the facility and related contingency plan. This is especially true given the rather limited budget of the school.	Greg Schermbeck	Facility and
What happens if a vacated school is not available (for any reason) after year 2? What is the contingency moving forward then?	Douglas Price	Facility and
Applicant does not provide a very detailed contingency plan if they cannot secure a building prior to the start of school.	Kristen Parker	Facility and

Reviewer	Score
Douglas Price	Fail
Robert McQuat	
Steven Walker	Fail
Greg Schermbeck	Fail
Tammi Sutton	
Sherry Reeves	Fail
Deanna Townsend-Smith	
Anthony Helton	Fail
Cande Honeycutt-Killian	Fail
Nicole Charles	Fail
Phyllis Gibbs	
Glenn Allen	
Kristen Parker	Fail

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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 1<sup>st</sup> month average daily membership.

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

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

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

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

LEA #1920 - Wake County Schools

Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
State Funds	\$4,873.23	200	\$974,646.00
Local Funds	\$2,309.00	200	\$461,800.00
Federal EC Funds	\$3,579.70	24	\$85,912.80
<b>Totals</b>			\$1,522,358.80

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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

<b>INCOME: REVENUE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
-State ADM Funds	\$900,390	\$1,800,780	\$2,701,170	\$2,926,268	\$2,926,268
-Local Per Pupil Funds	\$461,800	\$923,600	\$1,385,400	\$1,500,850	\$1,500,850
-Exceptional Children Federal Funds	\$90,435	\$180,870	\$271,305	\$293,914	\$293,914
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
<b>Z - TOTAL REVENUE</b>	<b>\$1,452,625</b>	<b>\$2,905,250</b>	<b>\$4,357,875</b>	<b>\$4,721,032</b>	<b>\$4,721,032</b>

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

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

Carolina Experimental School - Carolina Experimental School adopts best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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	\$81,600	\$81,600	1	\$83,232	\$83,232	1	\$84,897	\$84,897	1	\$86,595	\$86,595
Assistant Administrator	1	\$50,000	\$50,000	1	\$51,000	\$51,000	1	\$52,020	\$52,020	1	\$53,060	\$53,060	1	\$54,121	\$54,121
Finance Officer	0	\$0	\$0	.5	\$40,000	\$20,000	1	\$40,800	\$40,800	1	\$41,200	\$41,200	1	\$42,024	\$42,024
Clerical	1	\$20,000	\$20,000	1	\$20,400	\$20,400	2	\$40,800	\$81,600	2	\$41,600	\$83,200	2	\$42,457	\$84,914
Guidance Counselor	0	\$0	\$0	1	\$40,000	\$40,000	1	\$40,800	\$40,800	1	\$41,616	\$41,616	1	\$42,448	\$42,448
Nurse	0	\$0	\$0	.5	\$40,000	\$20,000	.5	\$40,800	\$20,400	.5	\$41,616	\$20,808	.5	\$42,448	\$21,224
Transportation Staff	0	\$0	\$0	0	\$0	\$0	2	\$18,000	\$36,000	2	\$18,360	\$36,720	2	\$18,727	\$37,454
A - Total Admin and Support:	3		\$150,000	5		\$233,000	8.5		\$354,852	8.5		\$361,501	8.5		\$368,780
Instructional Personnel:															
Core Content Teacher(s)	8	\$40,000	\$320,000	16	\$40,400	\$646,400	24	\$41,000	\$984,000	24	\$41,820	\$1,003,680	25	\$42,650	\$1,066,250
Electives/Specialty Teacher(s)	4	\$40,000	\$160,000	8	\$40,400	\$323,200	12	\$41,000	\$492,000	12	\$41,820	\$501,840	12	\$42,650	\$511,800
Exceptional Children Teacher(s)	1	\$40,000	\$40,000	2	\$40,400	\$80,800	3	\$41,000	\$123,000	3	\$41,820	\$125,460	3	\$42,650	\$127,950
Instructional Support	.5	\$40,000	\$20,000	1	\$40,800	\$40,800	1	\$41,616	\$41,616	1	\$42,448	\$42,448	1	\$43,297	\$43,297
Teacher Assistants	0	\$0	\$0	1	\$20,000	\$20,000	3	\$20,000	\$60,000	3	\$20,000	\$60,000	3	\$20,000	\$60,000

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

Subs	1	\$14,400	\$14,400	2	\$14,400	\$28,800	3	\$14,400	\$43,200	3	\$14,400	\$43,200	3	\$14,400	\$43,200
B - Total Instructional Personnel:	14.5		\$554,400	30		\$1,140,000	46		\$1,743,816	46		\$1,776,628	47		\$1,852,497
A+B = C - Total Admin, Support and Instructional Personnel:	17.5		\$704,400	35		\$1,373,000	54.5		\$2,098,668	54.5		\$2,138,129	55.5		\$2,221,277
Administrative & Support Benefits															
Health Insurance	3	\$6,000	\$18,000	5	\$6,300	\$31,500	6.5	\$6,615	\$42,998	6.5	\$6,946	\$45,149	6.5	\$7,293	\$47,405
Retirement Plan--NC State	3	\$3,000	\$9,000	5	\$2,796	\$13,980	6.5	\$2,943	\$19,130	6.5	\$2,998	\$19,487	6.5	\$3,058	\$19,877
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	3	\$605	\$1,815	5	\$564	\$2,820	8.5	\$505	\$4,293	8.5	\$515	\$4,378	8.5	\$525	\$4,463
Social Security	3	\$2,585	\$7,755	5	\$2,409	\$12,045	8.5	\$2,158	\$18,343	8.5	\$2,198	\$18,683	8.5	\$2,243	\$19,066
D - Total Admin and Support Benefits:	12		\$36,570	20		\$60,345	30		\$84,763	30		\$87,697	30		\$90,810
Instructional Personnel Benefits:															
Health Insurance	13.5	\$6,000	\$81,000	28	\$6,300	\$176,400	43	\$6,615	\$284,445	43	\$6,946	\$298,678	44	\$7,293	\$320,892
Retirement Plan--NC State	13.5	\$2,400	\$32,400	28	\$2,381	\$66,668	43	\$2,373	\$102,039	43	\$2,418	\$103,974	44	\$2,467	\$108,548
Retirement Plan--Other	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Social Security	13.5	\$1,977	\$26,690	30	\$1,965	\$58,950	46	\$1,960	\$90,160	46	\$1,997	\$91,862	47	\$2,037	\$95,739
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Medicare	13.5	\$497	\$6,710	30	\$460	\$13,800	46	\$459	\$21,114	46	\$467	\$21,482	47	\$477	\$22,419
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
E - Total Instructional Personnel Benefits:	54		\$146,799	116		\$315,818	178		\$497,758	178		\$515,996	182		\$547,598
D+E = F - Total Personnel Benefits	66		\$183,369	136		\$376,163	208		\$582,521	208		\$603,693	212		\$638,408

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

A+D = G - Total Admin and Support Personnel (Salary & Benefits)	15		\$186,570	25		\$293,345	38.5		\$439,615	38.5		\$449,198	38.5		\$459,590
B+E = H - Total Instructional Personnel (Salary & Benefits)	68.5		\$701,199	146		\$1,455,818	224		\$2,241,574	224		\$2,292,624	229		\$2,400,095
G+H = J - TOTAL PERSONNEL	83.5		\$887,769	171		\$1,749,163	262.5		\$2,681,189	262.5		\$2,741,822	267.5		\$2,859,685

Carolina Experimental School - Carolina Experimental School adopts evidence-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>		<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
	Administrative & Support:					
Office:	Office Supplies	\$1,000	\$2,000	\$3,000	\$3,000	\$3,000
	Paper	\$2,000	\$3,000	\$4,000	\$4,000	\$4,000
	Computers & Software	\$3,000	\$2,000	\$2,000	\$500	\$500
	Communications & Telephone	\$20,000	\$20,000	\$30,000	\$30,000	\$30,000
	Copier leases	\$10,000	\$15,000	\$20,000	\$20,000	\$20,000
Management Company	Contract Fees	\$0	\$0	\$0	\$0	\$0
Professional Contract	Legal Counsel	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
	Student Accounting	\$0	\$0	\$0	\$0	\$0
	Financial	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
	Other Professional	\$5,000	\$10,000	\$10,000	\$10,000	\$10,000
Facilities	Facility Lease/Mortgage	\$300,000	\$600,000	\$800,000	\$800,000	\$800,000
	Maintenance	\$10,000	\$30,000	\$50,000	\$50,000	\$50,000
	Custodial Supplies	\$3,000	\$6,000	\$10,000	\$10,000	\$10,000
	Custodial Contract	\$20,000	\$30,000	\$40,000	\$40,000	\$40,000
	Insurance (pg19)	\$15,000	\$30,000	\$40,000	\$40,000	\$40,000
	Other	\$0	\$0	\$0	\$0	\$0
Utilities	Electric	\$20,000	\$40,000	\$60,000	\$60,000	\$60,000
	Gas	\$0	\$0	\$0	\$0	\$0
	Water/Sewer	\$10,000	\$20,000	\$30,000	\$30,000	\$30,000
	Trash	\$3,000	\$6,000	\$10,000	\$10,000	\$10,000
Transportation	Buses	\$0	\$30,000	\$30,000	\$30,000	\$30,000
	Gas	\$0	\$0	\$10,000	\$12,000	\$14,000
	Oil/Tires & Maintenance	\$0	\$0	\$2,000	\$2,000	\$2,000
Other	Marketing	\$5,000	\$5,000	\$5,000	\$2,000	\$2,000
	Child nutrition	\$0	\$20,000	\$30,000	\$30,000	\$30,000
	Travel	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000
	Other	\$0	\$0	\$0	\$0	\$0
	K - TOTAL Administrative & Support Operations	\$445,000	\$889,000	\$1,206,000	\$1,203,500	\$1,205,500
	Instructional:					
Classroom Technology	Computers	\$10,000	\$20,000	\$30,000	\$30,000	\$30,000

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	Software	\$5,000	\$10,000	\$15,000	\$15,000	\$15,000
	Instructional Technology	\$5,000	\$10,000	\$15,000	\$15,000	\$15,000
	Other	\$0	\$0	\$0	\$0	\$0
Instructional Contract	Instructional Support	\$10,000	\$20,000	\$30,000	\$30,000	\$30,000
	Staff Development	\$3,000	\$5,000	\$5,000	\$5,000	\$5,000
Books and Supplies	Instructional Materials	\$10,000	\$20,000	\$30,000	\$30,000	\$30,000
	Curriculum/Texts	\$20,000	\$20,000	\$20,000	\$10,000	\$10,000
	Copy Paper	\$10,000	\$20,000	\$30,000	\$30,000	\$30,000
	Testing Supplies	\$2,000	\$4,000	\$6,000	\$6,000	\$6,000
	Other	\$0	\$0	\$0	\$0	\$0
	L - TOTAL Instructional Operations	\$75,000	\$129,000	\$181,000	\$171,000	\$171,000
	K+L = M - TOTAL OPERATIONS	\$520,000	\$1,018,000	\$1,387,000	\$1,374,500	\$1,376,500



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**Overall Budget:**

<b>BUDGET OPERATIONS EXPENDITURE PROJECTIONS</b>	<b>2018-2019</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>2021-2022</b>	<b>2022-2023</b>
J - TOTAL PERSONNEL	\$887,769	\$1,749,163	\$2,681,189	\$2,741,822	\$2,859,685
M - TOTAL OPERATIONS	\$520,000	\$1,018,000	\$1,387,000	\$1,374,500	\$1,376,500
J+ M =N TOTAL EXPENDITURES	\$1,407,769	\$2,767,163	\$4,068,189	\$4,116,322	\$4,236,185
Z - TOTAL REVENUE	\$1,452,625	\$2,905,250	\$4,357,875	\$4,721,032	\$4,721,032
Z - N = SURPLUS / (DEFICIT)	\$44,856	\$138,087	\$289,687	\$604,711	\$484,848

**Budget Narrative:** (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

1. *How was the student enrollment number projected?*

*Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.*

*Provide the break-even point of student enrollment.*

We plan to have two 25-student classes in each grade level. In the first year, Carolina Experimental School will have 200 students in 6th to 9th grades. In the second year, CES will become a 3rd-10th-grade school with 400 students. In the third year, CES will become a K-11th-grade school with 600 students. In the four year, CES will be in its full capacity with 650 students, and it will have first group of high school graduates.

There will be a huge demand for the school. First, CES will be the first charter school in North Carolina to use the Chinese model in basic skills education. Chinese students stunning performance in international comparisons will definitely attract aspiring parents who want high quality education for their children. Asian way of education will be very appealing to the large Asian population in the Triangle. It will also attract parents who are seeking solutions for their low performing children. Second, CES will also be the first charter school in North Carolina to use the talent development model. Offering gifted education to regular students will be very appealing to parents. Third, CESs Great Minds program will attract classic-minded parents. There are a few charter schools with a classic education theme but CES is different from them. The Great Minds program broadens the scope of the Great Books program by including current classics, biographies, non-text classics (e.g., music, art) to make great ideas more relevant and accessible to 21st century students. This will appeal to parents who prefer rigorous education but frown upon old ways. Fourth, among Wake County Public Schools 10 planning regions, two of the three that will have the strongest growth are in Cary-Apex. It is anticipated that there will be a net gain of over 6,000 students from now to 2020 in these two planning regions. WCPSS will add new schools, which means reassignment of students. CES will be a good choice for those parents who do not like the uncertainty of reassignment. Fifth, CES aspires to duplicating Raleigh Charters success in five years. Green Hope is the best high school in Wake County but its 2015 average SAT score of 1719 is still far lower than Raleigh Charters 1866 and Chapel Hills 1789. The Chinese model will make CESs goal highly attainable.

The break-even point of student enrollment for the first year will be 194.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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

We will cut costs and seek other revenues. CES adopts China's practice of letting students do basic cleaning work. This service learning program will cut the custodian cost by a few thousand dollars. We will buy second hand furniture and equipment (e.g., those discarded by UNC) to save money. Each family is recommended to provide services (e.g., IT, website) or donate money to the school. We will charge fees for our after school programs. There are thousands of Chinese teenagers coming to America's summer camps each year. As a school with a Chinese flavor in a region with world class universities, we will attract some of them. There is abundant philanthropic money in America but there is a poverty of effective educational programs. If we find a solution to improving American students' performance, we will be very competitive in getting grants from those big foundations. Cutting one resource teacher position will save us about \$50,000.

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

No, we plan to apply for grants from foundations but we will do that after our application is approved.

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

20:1

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

CES will contract for accounting and financial service in Year 1. We will outsource this work to a firm with experiences in working with charter schools. CES students will do some basic cleaning work. Contracted custodians will come in weekly. CES will contract certified professionals for low-frequency EC services (e.g., psychological testing, speech, OT). The lead applicant has been an EC coordinator at a charter school so he knows about the prevailing rates and sources. CES will also contract for auditing and legal services. In selecting contractors or making large purchases, CES will request two quotes for purchases between \$1,000 to \$4,999 and three written quotes for purchases over \$5,000. All professionals should be certified.

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

CES will focus on basic skills, talent development and great books. CES will hire teachers with strong content knowledge, multiple talents and a passion for reading and great ideas. Teachers who can play multiple roles will make CES's small budget stretch further. CES emphasizes the importance of student ownership of textbooks. Teachers will recommend some low-price textbooks for students to buy. This will alleviate the schools spending on textbooks. CES's Great Minds program needs a large collection of classics. We will ask parents and the community to donate books. We will also get low cost books from used book sales, Amazon and Ebay.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

CES intends to cultivate autonomous learners. Technology has opened new possibilities. Students can watch lessons at home and do homework in class. American students are weak in doing practice. The flipped classroom enables teachers to shape students practice habit in school. CES plans to buy 40 Chromebooks in Year 1, 80 in Year 2, and eventually each student will have a laptop.

CES students will rely on carpooling for transportation in the first two years. A bus fund of \$30,000 will be set aside each year. It will be used for the down payment and the bus loan. CES will lease a 10,000-square-foot facility for its 200 students in Year 1. The \$300,000 facility budget will also cover the cost of potential remodeling to fit the schools need. An ideal situation is an existing charter school moves to a bigger building due to expansion, and CES will take over that facility.

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.*

About 8% of each years revenue is set aside for the reserve fund or the general fund balance. Our long term goal is to have a reserve fund equivalent of three months expenditure. It is impossible to achieve this goal in the first few years. We will build up this reserve gradually. In the first year, if the schools average monthly expenditure is \$120,000, then we need to have this amount of money on our balance sheet at the end of the academic year as a reserve fund. At the end of the second year, we plan to have a reserve fund equivalent of two months expenditure. Personnel expenditure is the biggest cost for the school. We have to have lean staffing. People with multiple expertise are preferred. For example, ideally, the art teacher will be able to maintain the schools website. The Chinese language teacher can also teach coding. The second largest expenditure will be the building rent. We need to get a favorable lease. We will teach students to save water, electricity, paper, and other resources to cut costs. We will get extra revenues from before and after school programs, summer camps, and donations.

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

In the first few years, we may have to lease a facility. CES plans to buy one or two school buses in Year 3, and the interest rate may be 8%. CES may also contract for the bus service then it will not need financing. CES will set aside a building fund of \$50,000 each year. It is in the facility leasing/mortgage budget. If the lease is much lower than the budget then more money will be saved for the fund. When an opportunity comes, we will use the reserved building fund for a mortgage down payment and monthly payments.

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*

CES will lease a school building in the first year. Offices will be equipped with computers and furniture. Classrooms will have desks, chairs, bookshelves, cabinets, whiteboards, calculators, textbooks, and LCD projectors. The school will buy a few carts of Chromebooks each year. Each

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

teacher will have a laptop. Science teachers will have some basic equipment for a science lab. There will be books and computers in the library. There will be tables and chairs in the commons and the courtyards. All these will be the schools assets.

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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?*

In the first few years, the accounting service will be outsourced to a firm so the Director and the accounting firm have segregated duties. The Director approves expenditures and monitors the school's cash balance. The accountant creates payrolls, issues checks, and maintains records. The Director will need the Board's approval in making financial decisions larger than \$1000 (e.g., purchasing laptops, leasing copiers).

Several measures will be taken to safeguard the schools assets. First, adequate insurance will be purchased. Second, the school's major assets (e.g., computers, desks and chairs, LCD projectors, graphic calculators) will be inventoried, and a check-out and check-in record will be maintained.

The Board will develop a financial policy manual to ensure adequate internal controls. The secretary, the Director and the teachers will follow the manual to keep accurate and adequate recording keeping. Receipts for all the purchases will be copied and the numbers will be entered into the school's spreadsheet/accounting software. The originals will be sent to the accountant. The Director will show a summary of the school's balance sheet to the school board every two months.

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

There are no related party transactions.

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

Elliott Davis, PLLC  
5410 Trinity Road  
Raleigh NC 27607  
919-987-2751

Dixon Hughes Goodman, LLP  
2501 Blue Ridge Road  
Raleigh, NC 27607  
919-875-4979

Richard Dean Cunningham, Jr., CPA PC  
201 East Marlin Street  
Raleigh, NC 27601  
919-349-5260

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<b>Section VI: Financial Plan Concerns and Additional Questions</b>	<b>Reviewer</b>	<b>Page Reference</b>
Only feasible is projected enrollment can be met.	Cande Honeycutt-Killian	Budget Reven
Is the revenue projection realistic given the reliance on the ability to enroll student willing to adhere to the philosophy?	Nicole Charles	Budget Reven
The enrollment projection aligns, however, budget concerns remain.	Greg Schermbeck	Budget Reven
Budget is only realistic if enrollment numbers can be met. Insufficient evidence of parent interest for this school.	Cande Honeycutt-Killian	Total Budget
Can the budget be fully analyzed without Appendix M? Where are contingencies with no working capital and no EMO/CMO participation?	Nicole Charles	Total Budget
Appendix M does not appear to be attached and thus makes it difficult to fully assess the budget revenue projections.	Greg Schermbeck	Total Budget
No budget for key personnel in year 1 (Finance Officer, Counselor, nurse, transportation staff).	Sherry Reeves	Personnel Bu
Salaries listed are not competitive for Wake County.	Cande Honeycutt-Killian	Personnel Bu
Will Custodial services be contracted out to a vendor?		
Concerns about lacking support staff both academically and administratively	Nicole Charles	Personnel Bu
Applicant needs to clarify: Custodial services are not listed as part of the personnel budget, why is this?	Kristen Parker	Personnel Bu
Are funds being budgeted for related services such as OT, PT, Speech, and Psychological Services?	Glenn Allen	Operations B
\$0 budgeted for transportation and child nutrition in year 1. This will affect school's ability to attract certain families.	Sherry Reeves	Operations B
Applicant needs to clarify: Instructional Materials- if students are going to be purchasing the textbooks/materials then those materials will need to be replaced each year. As the number of students grow, how come the amount is less for books/textbooks in the 4th and 5th year?	Kristen Parker	Operations B
Are the office supply projections realistic? Are families responsible for computers and supplies? Where is a transportation contingency in the event an IEP requires transportation? Why is there no nutrition amount listed at all?	Nicole Charles	Operations B
There are a number of budget concerns: \$1,000 for office supplies \$2,000 for office paper \$0 budget for Y1 \$0 budget for nutrition	Greg Schermbeck	Operations B
Unrealistic operational budget: Low office supply line Low Office supply paper Low budget for classroom computers and technology. No budget for EC-related services.	Cande Honeycutt-Killian	Operations B
Low first year surplus in light of budget deficiencies in both personnel and operations.	Cande Honeycutt-Killian	Total Expend
Where are the contingencies addressed?	Nicole Charles	Total Expend
How will the board secure a building given revenue projections?		
The applicant states that there will be demand for the school but does not actually provide data or support to highlight demand for the school. I believe the applicant states that "students will do basic cleaning work" and cut custodial staff as a financial contingency plan. This statement is troubling on a number of levels. The applicant does not provide a realistic plan to ensure financial sustainability for the	Greg Schermbeck	Budget Narra

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

school.		
Where in the narrative are the many remaining questions addressed: - how does the board plan on addressing unforeseen cost (i.e. transportation, nutrition, increased costs associated with I.E.Ps) - are custodial services included in the contracted costs? does the budget realistically include the cost given U.S child labor laws and the unrealistic proposal the student clean? - is family support a realistic way to count on revenue?	Nicole Charles	Budget Narra
The applicant fails to demonstrate need or demand of the school and relies on financial contributions from families to make the budget work. Facility contingency plan is weak. There is no concrete evidence provided that demonstrate financial stability.	Cande Honeycutt-Killian	Budget Narra
Break even is perilously close to projected enrollment.	Sherry Reeves	Budget Narra
Can the independent audit process be clarified?	Nicole Charles	Financial Au
The board does not have a clear plan to ensure financial stability and control. The audit plan is vague and needs detail.	Cande Honeycutt-Killian	Financial Au

Reviewer	Score
Glenn Allen	
Tammi Sutton	
Anthony Helton	Fail
Phyllis Gibbs	
Sherry Reeves	Fail
Cande Honeycutt-Killian	Fail
Robert McOuat	
Greg Schermbeck	Fail
Kristen Parker	Pass
Steven Walker	Fail
Nicole Charles	Fail
Douglas Price	Pass
Deanna Townsend-Smith	

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

**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).*  
800school Date: 09/19/2016

**Applicant Signature:**

The foregoing application is submitted on behalf of Carolina Experimental School (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. 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: 800school

Board Position: Board President

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

Date: 09/19/2016

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

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

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



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

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

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

## OVERALL ASSESSMENT

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

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

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

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

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

<b><u>CSAB Votes</u></b>	
<b>No</b>	<b>Yes</b>

***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 Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<b>Mission, Purposes, and Goals</b>	Again, very aggressive numbers and the survey does not seem to support them. I also have questions on the board membership. - theltoncsab
<b>Education Plan</b>	I'm concerned about this applicants understanding of EC regulations. - theltoncsab
<b>Governance and Capacity</b>	Applicant has 24 months after approval to obtain tax exempt status - theltoncsab
<b>Operations</b>	I am open to all types of meal plans but this one is not workable. - theltoncsab
<b>Financial Plan</b>	- theltoncsab
<b>OVERALL</b>	high projections for enrollment. I'd like to hear the basis of those numbers. Also, the thought behind the unique grade adds. - dtsmith840  - theltoncsab  - mycah068

### **External Evaluator**

<b>Mission, Purposes, and Goals</b>	<p><u>Mission Statement</u> The dual mission of the organization is confusing. It is not clear how this school will be an example of education reform. - gscherbeck</p> <p><u>Mission Statement</u> The mission is rather confusing and overly broad- can the applicant clarify the evidence-based practices claim? How is education reform tied to one school specifically?</p> <p>What has the board chosen stated as a specific model? Is there evidence that the mission can address the needs of American children and adhere to U.S laws? - nacharles</p> <p><u>Mission Statement</u> Could the applicant be more succinct in their description of the mission? The current description seems quite convoluted and not as focused as it should be. - mycah068</p> <p><u>Mission Statement</u> Mission statement is vague. What are the specific aspects of the school that would make it a leader in education reform? - cande_honeycuttk</p> <p><u>Mission Statement</u> Not clear on exactly what the mission statement means. - sherryreeves</p> <p><u>Educational Need and Targeted Student Population</u> Applicant needs to clarify: What research has been done to indicate a need and or interest for a school like this in Wake county?</p> <p>Applicant needs to clarify: A lot of data is shared about how the Chinese educational system works, what evidence is there to support that this approach will work for American Children?</p>
-------------------------------------	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>Applicant needs to clarify: How will "finding meaningful pursuits" in their spare time play out? What strategies are in place to support students who may not have the time and or financial ability to engage in additional extracurricular activities? - kzparker718</p> <p><u>Educational Need and Targeted Student Population</u> The "general student population" is not a targeted student population. The applicant should provide more information regarding why China's educational system is being used as a model. The applicant compares educational attainment scores between China and NC. These don't appear to be equitable comparisons. Further, 30 completed surveys is not a sufficient amount of data to capture educational need or interest. - gscherbeck</p> <p><u>Educational Need and Targeted Student Population</u> Is there a targeted student population identified by CES that does not violate charter law? The general student population is listed, however, the remaining application appears to be geared toward families who support a Chinese teaching methodology.</p> <p>Is schools in Durham and Wake are targeted, why are they not both included in the comparison data?</p> <p>Can the applicant clarify the education plan? How will the success of all students be considered including any student not familiar with Chinese schools or those not thriving in high stakes testing environments?</p> <p>Are the enough students in the triangle interested in this philosophy to fill the projected seats? Is there associated market research?</p> <p>What does is mean when a student is "an idle or broken machine that needs immediate attention" in terms of intervention at CES? - nacharles</p> <p><u>Educational Need and Targeted Student Population</u> Parent survey is insufficient to provide evidence of demand for this school. Only 30 families responded. The enrollment is 200 for the first year. That is insufficient to show there is a demand.</p> <p>The targeted population is not specific. How will the methodology used in the Shanghai system meet the educational needs of the student population. Besides the research on the system itself, what other evidence is available to show these methods would work for the targeted population?</p> <p>Applicant needs to provide additional evidence to support both the need of this model in this community and it's efficacy with American students. - cande_honeycuttk</p> <p><u>Educational Need and Targeted Student Population</u> Attached for review purposes is a map outlining the current charter schools. Additionally, the map provides an overview of the general placement of proposed charter schools for the 2018 school year: <a href="http://www.dpi.state.nc.us/charterschools/schools/map">http://www.dpi.state.nc.us/charterschools/schools/map</a>. - dtsmith840</p> <p><u>Educational Need and Targeted Student Population</u> Narrative states targeted population is general student population but then states the aim is to start school in an area with a large Asian population. Wouldn't that be a target population?</p>
--	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>How will teachers manage student time away from school? (Teachers are students' time managers. Any student who is not on the track of pursuing academic excellence, developing talents and expertise or reading great books at home is an idle or broken machine that needs immediate attention.) - sherryreeves</p> <p><u>Purposes of Proposed Charter School</u> Applicant needs to clarify: How will teachers have the opportunity to be responsible for learning at the school?</p> <p>Applicant needs to clarify: Evidence provided continue to narrate how the school is modeled after Chinese Education and the impact it has had in China. How can you ensure that the same results will occur within the American Education System? - kzparker718</p> <p><u>Purposes of Proposed Charter School</u> The applicant does not clearly describe how the proposed charter will achieve legislative purposes. The purposes provided are general and not specific. For example, it is unclear how the applicant will assess or measure the new professional development opportunities for teachers. - gschermbek</p> <p><u>Purposes of Proposed Charter School</u> How are teachers responsible for learning given the rigid curriculum proposed? How does CES improve student learning rather than maximize the talents of those already succeeding?</p> <p>What is innovative about the use of textbooks, memorization, and reading of books? - nacharles</p> <p><u>Purposes of Proposed Charter School</u> Can the applicant be more specific in answers #1 of the 6 Leg. Purposes? - mycah068</p> <p><u>Purposes of Proposed Charter School</u> Purposes provide general information but does not provide specific details as to how this school will meet the proposed purposes. What is innovative about this school? Applicant needs to provide specifics and elaborate. - cande_honeycuttk</p> <p><u>Goals for the Proposed Charter School</u> Applicant needs to clarify: Goals are outlined but not specific enough. How will the board measure "Great people and great ideas?" How will Autonomous and disciplined learners be measured? - kzparker718</p> <p><u>Goals for the Proposed Charter School</u> Are the achievement goals manageable and realistic if a variety of students attend CES?</p> <p>Are the actionable steps toward a building purchase? The applicant should clarify operations goals.</p> <p>How will the financial goals be accomplished given the proposed budget? - nacharles</p> <p><u>Goals for the Proposed Charter School</u> Is there evidence to suggest that 70% scoring at Level 3 or higher is feasible in this LEA? Should they anticipate receiving the lowest in the county? - mycah068</p> <p><u>Goals for the Proposed Charter School</u></p>
--	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>What is the existing data that supports the goals set for Goal 1? Is this goal attainable for students in the community this school proposes to serve?</p> <p>- cande_honeycuttk</p> <p><u>Goals for the Proposed Charter School</u> ACT Explore has been replaced with ACT Aspire. - sherryreeves</p> <p><u>Goals for the Proposed Charter School</u> Strong goals. I would like to hear more about the goal of having two non-Chinese born board members (especially surrounding the legality of a nationality requirement). - dswalker</p>
<p><b>Education Plan</b></p>	<p><u>Instructional Program</u> Applicant needs to clarify: How will these instructional methods support learning for the general student population as outlined as the targeted student population?</p> <p>Applicant needs to clarify: What will be used for rigorous testing?</p> <p>Applicant needs to clarify: Will students only be assessed at the end of each quarter? How will you work to ensure students are not falling behind? - kzparker718</p> <p><u>Instructional Program</u> The applicant does not provide documented evidence to support the Chinese learning model. It is also not clear if memorization is should be the centerpiece of an educational program. It is also unclear why the applicant consistently compares FLA achievement scores to NC. The proposed assessment strategies are unclear. - gscherbeck</p> <p><u>Instructional Program</u> Is time and great books the strategy or simply tools CES proposed to use? Can students with learning style differences or disabilities succeed under this model of high-stakes and autonomous learning?</p> <p>Is there data suggesting that the effectiveness of Chinese models can succeed with American children? - nacharles</p> <p><u>Instructional Program</u> Can the applicant be more specific in what assessments will be given at this school? - mycah068</p> <p><u>Instructional Program</u> What evidence can you provide that demonstrates the Chinese method would be successful for the targeted student population?</p> <p>What assessments will be used to demonstrate student success? Will there be formative assessments? - cande_honeycuttk</p> <p><u>Instructional Program</u> Why compare NC students to FL students? Instructional program is Rigorous Testing + Talent Development + Great Books "Talents are not innate."</p>

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>"The Chinese model ...can even make disadvantaged students perform at very high level." Explain. Give more details about the Great Minds Program. - sherryreeves</p> <p><u>Curriculum and Instructional Design</u> Applicant needs to clarify: What if student's do not have the financial resources to pay for the textbooks?</p> <p>Applicant needs to clarify: How will the teaching practices and curriculum reach all students? The school is targeting the general population, how will learning be differentiated and ensure that ALL students will succeed? - kzparker718</p> <p><u>Curriculum and Instructional Design</u> The applicant could not provide a calendar template for the 2018 school year. Appendix B is attached but lacks details regarding alignment to the NCSCOS and related assessments. The applicant also does not provide specifics regarding how "books" will be leveraged to increase student proficiency. The applicant does not explain how the Chinese textbooks will align with the NCSCOS. Many aspects of instructional design are general statements and not supported with documentation or facts. - gscherbeck</p> <p><u>Curriculum and Instructional Design</u> The scope and sequence appear overly broad and ambitious. Can the applicant share the detailed curriculum?</p> <p>Are there additional program and services or do children merely read?</p> <p>Calendar lacks detail and isn't aligned to the right school year.</p> <p>Are students required to pay for textbooks? How are the needs of families from low-income or low wealth backgrounds addressed?</p> <p>- nacharles</p> <p><u>Curriculum and Instructional Design</u> Can the applicant please give a specific grade level example of the Scope and Sequence? The outline currently given is a broad overview of each school.</p> <p>Being that this school is using a Chinese model to education, could the applicant please provide more information about the high school will create "Future Ready" students.</p> <p>Can the applicant also speak toward the data that exists to show that over-testing does not produce better students? It appears this school is going to be heavily dependent on testing.</p> <p>Can the applicant provide a better narrative that explains how mimicking the current traditional calendar at their particular school will truly coincide with the proposed mission and education plan? - mycah068</p> <p><u>Curriculum and Instructional Design</u> Applicant needs to provide a grade level scope and sequence.</p>
--	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>Will families be responsible for purchasing student textbooks? If so, how will the school ensure that this will not be a barrier to enrollment for families with limited financial resources?</p> <p>How will the curriculum presented be accessible for all students? How will it be differentiated for different ability levels?</p> <p>Please provide a more detailed calendar that aligns with the mission of the school? - cande_honeycuttk</p> <p><u>Curriculum and Instructional Design</u> Why is elementary day longer than MS and HS day? Students should not have to purchase their textbooks. Why choose only minimum standards for high school graduation (22 credits/NC requirement). Shouldn't this goal be loftier? - sherryreeves</p> <p><u>Special Programs and "At-Risk" Students</u> Applicant needs to clarify: Rationale and detail is provided about methods in China, however, there is no clear outline of exactly what the school will do to identify, prevent an support all students. - kzparker718</p> <p><u>Special Programs and "At-Risk" Students</u> Plan is vague and does not specifically address at risk students. How are interventions utilized and progress monitored to determine the effectiveness. - kevin_allen</p> <p><u>Special Programs and "At-Risk" Students</u> The applicant does not cite a sound plan and clear systems to support At-Risk students. Many platitudes and ideas are listed without a clear plan to assist students who may need the most support. - gschermbek</p> <p><u>Special Programs and "At-Risk" Students</u> Is there an actual plan or system beyond the analogies?</p> <p>Is the applicant clear about 504 versus an IEP process?</p> <p>Is the applicant prepared for ELL students?</p> <p>- nacharles</p> <p><u>Special Programs and "At-Risk" Students</u> Where is the clear plan and system for intervention? This question was used as a vent-session, rather than actually answering the question at hand. Are the applicants stating that they will take this same approach, or are they wanting to adapt this model for this school to fit an American audience?</p> <p>Can the applicant provide justification for offering academic opportunities to AIG students, but not acutely responding to those who require intervention? Specific, education and doctoral references would be highly encouraged in this area. - mycah068</p> <p><u>Special Programs and "At-Risk" Students</u> Applicant needs to provide clear details and plan for ensuring at-risk students are being identified and served.</p>
--	---



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>Applicant needs to provide details for serving ELL students.</p> <p>Applicant needs to address academic opportunities for gifted students. - cande_honeycuttk</p> <p><u>Special Programs and "At-Risk" Students</u> US has laws that protect Exceptional Children and persons with disabilities. Public schools must adhere to these laws. - sherryreeves</p> <p><u>Exceptional Children – Identification and Records</u> What is your child find process? You have identified what you will do if a referral is received but nothing about the process used prior to referral. The 504 process is a regular education process and should not be confused with the IEP process. - kevin_allen</p> <p><u>Exceptional Children – Identification and Records</u> The applicant lists general strategies. It is unclear if the applicant understands state and federal requirements. - gschermebeck</p> <p><u>Exceptional Children – Identification and Records</u> Does the applicant plan on using a child find process?</p> <p>Is the applicant aware of the alarming nature of the admission interview in identifying exceptional students? - nacharles</p> <p><u>Exceptional Children – Identification and Records</u> Applicant needs to specify how they will ensure they will follow the Child Find process.</p> <p>Applicant needs to provide sufficient details to demonstrate understanding of state and federal requirements regarding identifying children with disabilities. - cande_honeycuttk</p> <p><u>Exceptional Children – Identification and Records</u> Is it common practice to denote EC status on the enrollment form or during the admission interview? - dswalker</p> <p><u>Exceptional Children – Education Programming</u> Applicant needs to clarify: How will EC students advancement towards goals be monitored other than through state aligned practice tests?</p> <p>Applicant needs to clarify: It is stated in the application that "CES will try to offer EC students a full continuum of services.." Why would this not occur? - kzparker718</p> <p><u>Exceptional Children – Education Programming</u> The full continuum of service also includes a separate setting. A students IEP would contain information about necessary accommodations and modifications. It appears there is some confusion between the two. - kevin_allen</p> <p><u>Exceptional Children – Education Programming</u> The applicant provides general strategies and also cites that the Chinese educational model (which they plan to follow) does not leverage EC teachers. Thus, it is not clear if the applicant will follow FAPE and related regulations with fidelity. - gschermebeck</p> <p><u>Exceptional Children – Education Programming</u> Are there strategies beyond the generalized ones listed in the here? It is unclear if the</p>
--	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>applicants understands federal and state requirements for varying settings including planning for pull-out, separate settings, and growth for students with I.E.Ps.</p> <p>If the Chinese model is proposed but does not generally accommodate for exceptional students, can this model be used in this country given the laws? - nacharles</p> <p><u>Exceptional Children – Education Programming</u> Is this school committed to offering EC services, the way that they should be, as a public education institution? I am concerned that this school might not have a commitment with FAPE; most of this section (and the one above) is spent comparing models of China vs. USA, emphasizing that China does NOT offer many of the things that USA does. - mycah068</p> <p><u>Exceptional Children – Education Programming</u> Applicant needs to demonstrate that they will provide FAPE and will provide the full continuum of services for children with disabilities. - cande_honeycuttk</p> <p><u>Exceptional Children – Education Programming</u> Applicant mentions several times that there is no EC in China. Therefore it makes one wonder if school will adhere to EC laws and practices with integrity. EC teachers should not be tasked with writing/implementing 504 plans. - sherryreeves</p> <p><u>Exceptional Children – Education Programming</u> I'm not sold that the school is going to provide EC services in compliance with state and federal law. - dswalker</p> <p><u>Student Performance Standards</u> Applicant needs to clarify: How will progress for students be shared with families and stakeholders?</p> <p>Applicant needs to clarify: If a student is completing the same retest, is that really showing their mastery of the content?</p> <p>Applicant needs to clarify: What will grades K-2 be assessed on if there is no EOG? - kzparker718</p> <p><u>Student Performance Standards</u> The plan mentions students with special needs but does not specifically address students with disabilities. Special needs cover a broad spectrum. - kevin_allen</p> <p><u>Student Performance Standards</u> The applicant does not provide specifics regarding how evaluation tools or assessments will drive data-based instruction. - gscherbeck</p> <p><u>Student Performance Standards</u> Which students are considered special needs? Special needs are vast and cannot be addressed in one strategy. Are there policies and standards to address the varying needs?</p> <p>What is the evaluation tool?</p> <p>What is offered in terms of remediation?</p>
--	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>Why are the graduation requirements not aligned with NC standards if the base curriculum is that of the local LEA/Wake?</p> <p>Will probations for poor performance be reflected in the students record? - nacharles</p> <p><u>Student Performance Standards</u> What is this "probation" period for a student; what does it look like?</p> <p>What barriers are in place for HS students who place out of the HS courses offered, and the next step are college courses? How will the school establish that the student is placed in appropriate school courses and that they are attending?</p> <p>What does "being retained conditionally" mean? - mycah068</p> <p><u>Student Performance Standards</u> What are the specific assessments that will be used?</p> <p>How will the school utilize the IEP for performance standards for students with disabilities?</p> <p>Applicant needs to clarify what "retained conditionally" means.</p> <p>State standardized tests cannot be the only metric for promotion. - cande_honeycuttk</p> <p><u>Student Performance Standards</u> Students must engage in self-remediation if he/she falls below standard. - sherryreeves</p> <p><u>Student Conduct and Discipline</u> Applicant needs to clarify: More detail about the Honor system needs to be detailed and explained how it will support a safe environment for all students. - kzparker718</p> <p><u>Student Conduct and Discipline</u> The narrative mentions the IEP involvement in the discipline process but does not mention having to provide services even if the behavior is determined to be a manifestation of the disability. I would encourage the applicant to revisit Policies Governing Services for Children with Disabilities. - kevin_allen</p> <p><u>Student Conduct and Discipline</u> The applicant cites general statements "Chinese schools have fewer behavior incidents" without providing data and documentation.</p> <p>The applicant also fails to lack a clear plan to drive a safe student culture and system. - gschembeck</p> <p><u>Student Conduct and Discipline</u> Is there data to support that claims regarding discipline?</p> <p>Although offenses and consequences are listed, are there policies for discipline?</p> <p>The applicant should clarify how student conduct will align with the mission beyond the reliance on students' "self-discipline".</p> <p>- nacharles</p>
--	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p><u>Student Conduct and Discipline</u> What further research can be provided to support the use of the Chinese model of discipline and intrinsic value? Can other research outside of Chinese models be provided to support the same statements/arguments? - mycah068</p> <p><u>Student Conduct and Discipline</u> Applicant needs to provide additional clarification beyond what is given for student discipline. What research supports that these methods would be effective for American students?</p> <p>While students with disabilities are mentioned, it is not clear that the board has an understanding of the legal requirements of the discipline of students with disabilities. - cande_honeycuttk</p> <p><u>Student Conduct and Discipline</u> This plan is a little light on details and I'm not sure that the due process provisions that are required by law are fully comprehended. - dswalker</p>
<p><b>Governance and Capacity</b></p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> N/A - gscherbeck</p> <p><u>Tax-Exempt Status 501 (c)(3)</u> 501(c)(3) is not required at this time. - cande_honeycuttk</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> An organizational chart is attached but rather confusing. Youtube videos may not be the best expectation to set for board development and training. - gscherbeck</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The organizational chart is not clearly teased out. Can the structure be clarified and the roles for faculty/staff, PTA, and parents be described in more detail?</p> <p>Why are the board members not all on the same page and in congruence with the responsibilities listed in the application? - nacharles</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Applicant needs to provide a more detailed organizational chart.</p> <p>There are no board members with school leadership experience. How will the board recruit additional board members to ensure that the primary areas and skills are covered?  - cande_honeycuttk</p> <p><u>Proposed Management Organization (EMO/CMO)</u> N/A - gscherbeck</p> <p><u>Proposed Management Organization (EMO/CMO)</u> CES is not proposing to use a EMO/CMO - nacharles</p> <p><u>Proposed Management Organization (EMO/CMO)</u> Not applicable. - mycah068</p> <p><u>Proposed Management Organization (EMO/CMO)</u></p>

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>The school will not contract with and EMO/CMO. - cande_honeycuttk</p> <p><u>Staffing Plans, Hiring, and Management</u> Applicant needs to clarify: Will not allowing teachers who do not have high ACT/SAT scores put the school at a disadvantage for hiring teachers? What is considered a high SAT/ACT score?</p> <p>Applicant needs to clarify: Wouldn't it be considered discrimination to not hire someone with an average ACT/SAT score, however, they are qualified in other ways for the job?</p> <p>- kzparker718</p> <p><u>Staffing Plans, Hiring, and Management</u> The applicant does not provide a clear recruitment or retainment plan for high-performing teachers. It merely states that the school will attract candidates itself. The applicant provides basic and minimal procedures to ensure quality staff. - gschermbek</p> <p><u>Staffing Plans, Hiring, and Management</u> Does "hopefully... will attract enough applicants" suffice in terms of recruitment? Given the high standards and unique methodology required for CES's curriculum, are there other strategies required to attract the right talent?</p> <p>Who is hired first: teachers or administrators? Both are required for hiring and the board has allocated the responsibility of hiring teachers to the director but the hiring of the director requires teacher/parent input.</p> <p>Can student performance truly be traced back to teacher evaluation practices? Is one director enough to do all of the required evaluations for the entire staff given that the assistant handles discipline? - nacharles</p> <p><u>Staffing Plans, Hiring, and Management</u> Solid plan for recruiting and retaining high quality teachers is not given.</p> <p>The board cannot delegate authority for hiring to the Director. Only the board may hire and fire employees.</p> <p>Wake County offers a supplement to the state salary. How will this school be comparable without the supplement?</p> <p>It is recommended that the EC Coordinator does not also coordinate Section 504. - cande_honeycuttk</p> <p><u>Staffing Plans, Hiring, and Management</u> Missing several key positions in year 1 (counselor, nurse, finance officer, transportation staff). Clerk cannot be Testing Coordinator. - sherryreeves</p> <p><u>Staff Evaluation and Professional Development</u> Applicant needs to clarify: How will teachers be trained in the instructional methods as proposed in the school mission and throughout the application?</p> <p>Applicant needs to clarify: What specific training and benefits will teachers receive at</p>
--	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

CES so that teachers will stay around for a long time?

Applicant needs to clarify: Information is provided about what needs to change but there are no specifics about how teachers will be evaluated. What is the specific evaluation method for teachers? How and when will they be evaluated and by whom?

Applicant needs to clarify: What is the timeline for teachers learning all the core components to teach students? - kzparker718

Staff Evaluation and Professional Development  
The Staff Evaluation and Professional Development plan lack detail. General strategies are provided but it is unclear how they align with the proposed school budget and how they will drive student performance. - gschermbek

Staff Evaluation and Professional Development  
Is a 7 day professional development for a unique school structure enough given potential recruitment challenges?

is the rigorous evaluation proposal manageable and productive in terms of student outcomes? - nacharles

Staff Evaluation and Professional Development  
Applicant needs to clarify how staff will be trained to implement the methods presented in the Education Plan and Curriculum.

Applicant needs to provide specific evaluation practices for teachers. - cande\_honeycuttk

Marketing Plan  
Creating a website and Facebook page may not be enough to ensure the school meets its projected student enrollment.  
This section lacks great detail. - gschermbek

Marketing Plan  
How is the budget going to accommodate for all of the needs outlined in the application?  
Are parents a reliable source of income for a publically funded school? - nacharles

Marketing Plan  
Applicant needs to provide additional details on marketing to ensure a diverse population of students. Since the educational need section was weak at best, the school would rely upon a well-thought marketing plan to fulfill projected enrollment. - cande\_honeycuttk

Parent and Community Involvement  
This plan lacks detail. It is also unclear how the school will respond if parents and the local community are not able to donate money or time. - gschermbek

Parent and Community Involvement  
Can CES engagement strategy share times to highlight how practical the proposed strategies are? Will involvement opportunities be culturally relevant? - nacharles

Parent and Community Involvement  
Other than the PTA, donations, and website offerings, what does this school plan to offer in ways of parental engagement? How can parents be further encouraged to "buy-in" to the schools idea, mission, and goals. - mycah068

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p><u>Parent and Community Involvement</u> The plan focuses on parent donations and support but fails to provide a plan for parent and community engagement which goes much deeper than monetary resources. Applicant needs to revise plan to include engagement. - cande_honeycuttk</p> <p><u>Admissions Policy</u> Are the admission interviews, school tours, open houses and orientation mandatory or optional?  When can new students take the day of classes given the indicated lottery dates? Are the days for students in year two and beyond only? Are there re-enrollment preferences for students studying abroad?  Will staff and board member children receive preference or is there a cut-off? - nacharles</p> <p><u>Admissions Policy</u> Applicant use of language "lottery tickets" and "winning the lottery" seems odd. Enrollment preferences are vague and lack detail. Sibling preference needs clarification. Will there be sibling preference? If so, what will that process look like? What if student/family does not complete admission activities such as the open house? Will the child be denied enrollment? How is this not posing a barrier? - cande_honeycuttk</p> <p><u>Projected Student Enrollment (Table)</u> The applicant should provide reasoning to start in 6th grade, then add 5th grade and 10th/11th grades in year 2. - gschermebeck</p> <p><u>Projected Student Enrollment (Table)</u> Is it realistic to assume that all students will come from Wake County only? If the educational quality is above average, is it reasonable to assume that students from Durham or even Orange County (and whose parents may work in Wake) could also apply?  Will CES be able to attract the projected number of students willing to adhere to CES's philosophy? - nacharles</p> <p><u>Projected Student Enrollment (Table)</u> Applicant failed to provide evidence of support or need for this school. - cande_honeycuttk</p> <p><u>Weighted Lottery</u> N/A - gschermebeck</p> <p><u>Weighted Lottery</u> CES does not indicate the use of a weighted lottery - nacharles</p> <p><u>Weighted Lottery</u> Not applicable - mycah068</p> <p><u>Weighted Lottery</u> The school is not using a weighted lottery. - cande_honeycuttk</p> <p><u>Weighted Lottery</u> No weighted lottery even though applicant states if "certain ethnic groups are significantly underrepresented...we will make effort to target these groups." - sherryreeves</p>
--	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p><b>Operations</b></p>	<p><u>Transportation Plan</u> The applicant does not provide specific transportation plans to ensure all children will have access to transportation. - gschermbek</p> <p><u>Transportation Plan</u> Applicant needs to clarify: How will carpooling ensure that all students have the opportunity to attend your school? What if there are students who cannot carpool? - kzparker718</p> <p><u>Transportation Plan</u> How will transportation be provided to those students with transportation identified as a related service on their IEP? - kevin_allen</p> <p><u>Transportation Plan</u> Does the transportation policy consider hardships for parents without cars or families with unique challenges?  How will CES address the needs of students whose IEP requires transportation? - nacharles</p> <p><u>Transportation Plan</u> What happens if carpooling is not convenient nor an option for a set of parents? - mycah068</p> <p><u>Transportation Plan</u> Applicant needs to provide clear plan that demonstrates that transportation will not be a barrier for families. Applicant needs to clarify how transportation will be provided for students with disabilities that has transportation as part of the IEP. - cande_honeycuttk</p> <p><u>Transportation Plan</u> Years 1 and 2 transportation plan is carpooling. Buses to be added in year 3. This may pose a hindrance to some families. - sherryreeves</p> <p><u>School Lunch Plan</u> The applicant does not provide specific school lunch plans, specifically for students who may qualify for free / reduced lunch. - gschermbek</p> <p><u>School Lunch Plan</u> Applicant needs to clarify: How will you ensure that students who qualify for free/reduced lunch will receive this opportunity? - kzparker718</p> <p><u>School Lunch Plan</u> How will students who would qualify for free or reduced lunches be able to participate in a lunch program that will cost \$3 to \$8 a day? Is breakfast included given the amount of time dedicated to in class time (see schedule)?  How does the school define low income?  How will CES prevent students from feeling stigmatized and/or lacking options under the proposed plan? - nacharles</p> <p><u>School Lunch Plan</u> How will the board ensure that no child goes hungry in Year 1, regardless of subsidies and funding?</p>
--------------------------	--



Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>How will the Board respond if more low-income families apply and are entered into this school, than anticipated? - mycah068</p> <p><u>School Lunch Plan</u> Applicant needs to clarify how it will ensure that no child will go without lunch especially for low-income families. - cande_honeycuttk</p> <p><u>School Lunch Plan</u> No subsidy in year 1; vendor meals projected to cost \$3 to \$8. How will students who qualify for F&amp;RL pay for their lunches with these price points? - sherryreeves</p> <p><u>School Lunch Plan</u> Unacceptable lunch plan. Not even close. - dswalker</p> <p><u>Civil Liability and Insurance</u> There is no contact information for the insurance company listed. The logo appears different on the website. - nacharles</p> <p><u>Healthy and Safety Requirements</u> Not signed by board chair. - sherryreeves</p> <p><u>Facility and Facility Contingency Plan</u> The applicant does not provide enough information regarding the facility and related contingency plan. This is especially true given the rather limited budget of the school. - gscherbeck</p> <p><u>Facility and Facility Contingency Plan</u> Applicant does not provide a very detailed contingency plan if they cannot secure a building prior to the start of school. - kzparker718</p> <p><u>Facility and Facility Contingency Plan</u> What is the contingency in the event no building can be secured?</p> <p>What is the realistic and practical plan for CES as it grows?</p> <p>What is the capital project plan and how can the money be raised? - nacharles</p> <p><u>Facility and Facility Contingency Plan</u> What happens if a vacated school is not available (for any reason) after year 2? What is the contingency moving forward then? - mycah068</p> <p><u>Facility and Facility Contingency Plan</u> What if there are no vacated school facilities? Does the board have a specific space in mind?</p> <p>Contingency plan is weak. Applicant needs to provide a strong, viable contingency plan. - cande_honeycuttk</p>
<p><b>Financial Plan</b></p>	<p><u>Budget Revenue Projections from Each LEA (Table)</u> The enrollment projection aligns, however, budget concerns remain. - gscherbeck</p> <p><u>Budget Revenue Projections from Each LEA (Table)</u> Is the revenue projection realistic given the reliance on the ability to enroll student willing to adhere to the philosophy? - nacharles</p>

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p><u>Budget Revenue Projections from Each LEA (Table)</u> Only feasible is projected enrollment can be met. - cande_honeycuttk</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Appendix M does not appear to be attached and thus makes it difficult to fully assess the budget revenue projections. - gscherbeck</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Can the budget be fully analyzed without Appendix M? Where are contingencies with no working capital and no EMO/CMO participation? - nacharles</p> <p><u>Total Budget Revenue Projections 2018-2023 (Table)</u> Budget is only realistic if enrollment numbers can be met. Insufficient evidence of parent interest for this school. - cande_honeycuttk</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Applicant needs to clarify: Custodial services are not listed as part of the personnel budget, why is this? - kzparker718</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Concerns about lacking support staff both academically and administratively - nacharles</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Salaries listed are not competitive for Wake County.</p> <p>Will Custodial services be contracted out to a vendor? - cande_honeycuttk</p> <p><u>Personnel Budget: Expenditures 2018-2023 (Table)</u> No budget for key personnel in year 1 (Finance Officer, Counselor, nurse, transportation staff). - sherryreeves</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> There are a number of budget concerns: \$1,000 for office supplies \$2,000 for office paper \$0 budget for Y1 \$0 budget for nutrition</p> <p>- gscherbeck</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Applicant needs to clarify: Instructional Materials- if students are going to be purchasing the textbooks/materials then those materials will need to be replaced each year. As the number of students grow, how come the amount is less for books/textbooks in the 4th and 5th year? - kzparker718</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Are funds being budgeted for related services such as OT, PT, Speech, and Psychological Services? - kevin_allen</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Are the office supply projections realistic? Are families responsible for computers and supplies? Where is a transportation contingency in the event an IEP requires</p>
--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>transportation? Why is there no nutrition amount listed at all? - nacharles</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> Unrealistic operational budget: Low office supply line Low Office supply paper Low budget for classroom computers and technology. No budget for EC-related services. - cande_honeycuttk</p> <p><u>Operations Budget: Expenditures 2018-2023 (Table)</u> \$0 budgeted for transportation and child nutrition in year 1. This will affect school's ability to attract certain families. - sherryreeves</p> <p><u>Total Expenditure Projections (Table)</u> Where are the contingencies addressed?</p> <p>How will the board secure a building given revenue projections? - nacharles</p> <p><u>Total Expenditure Projections (Table)</u> Low first year surplus in light of budget deficiencies in both personnel and operations. - cande_honeycuttk</p> <p><u>Budget Narrative</u> The applicant states that there will be demand for the school but does not actually provide data or support to highlight demand for the school. I believe the applicant states that "students will do basic cleaning work" and cut custodial staff as a financial contingency plan. This statement is troubling on a number of levels. The applicant does not provide a realistic plan to ensure financial sustainability for the school. - gschermebeck</p> <p><u>Budget Narrative</u> Where in the narrative are the many remaining questions addressed: - how does the board plan on addressing unforeseen cost (i.e. transportation, nutrition, increased costs associated with I.E.Ps) - are custodial services included in the contracted costs? does the budget realistically include the cost given U.S child labor laws and the unrealistic proposal the student clean? - is family support a realistic way to count on revenue? - nacharles</p> <p><u>Budget Narrative</u> The applicant fails to demonstrate need or demand of the school and relies on financial contributions from families to make the budget work. Facility contingency plan is weak. There is no concrete evidence provided that demonstrate financial stability. - cande_honeycuttk</p> <p><u>Budget Narrative</u> Break even is perilously close to projected enrollment. - sherryreeves</p> <p><u>Financial Audits</u> Can the independent audit process be clarified? - nacharles</p> <p><u>Financial Audits</u> The board does not have a clear plan to ensure financial stability and control. The audit</p>
--	---

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	plan is vague and needs detail. - cande_honeycuttk
<b>OVERALL</b>	<p><u>Grade Levels Served and Total Student Enrollment:</u> 50 students per grade level is a rather low student enrollment projection. - gscherbeck</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Are these numbers truly realistic? Could it be documented with evidence that this school would be able to increase its enrollment by 200 students each year (YRS 1-3)?</p> <p>Where is the signature? - mycah068</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> 200 students is low for these grades. In addition, there is little support as evidenced in A1 of the demand for this type of school. - cande_honeycuttk</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Are there sufficient families interested in the philosophy of this school so as to reach projected enrollment numbers? Concern: aggressive enrollment/growth pattern in years 1-3. - sherryreeves</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Adding a lot of grades in years 2 and 3 and in a somewhat odd manner. I would like to hear more about the rationale behind this decision. - dswalker</p>

### **Charter School Advisory Board Subcommittee**

<b>Mission, Purposes, and Goals</b>	
<b>Education Plan</b>	
<b>Governance and Capacity</b>	
<b>Operations</b>	
<b>Financial Plan</b>	
<b>OVERALL</b>	

### **Overall Summary**

<b>Initial Screening</b>  <b>09/30/2016</b>	The Office of Charter Schools deemed this application complete on September 30, 2016. No further information is need for the application evaluation.
---	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

<p><b>Application Review</b></p>	<p>OCS provided a brief overview of the proposed application including the enrollment over five (5) years, proposed county, and mission of the proposed school. 2 board members were present for the clarification/review opportunity.</p> <p>Ms. Reeves outlined the vagueness of the mission statement and wanted to know the purpose of the school. Mr. Walker discussed that the governance goal was to have 2 Chinese board members on the board. Ms. Corenetto outlined there may need to be revised wording on that component.</p> <p>Mr. Walker outlined he had concerns with the legalities of EC plan as student had to check a box indicating their EC status. Additionally, he pointed out that the external evaluators had a lot of comments regarding that component. Also, Mr. Walker wished to review the due diligence for the proposed applicant group. Mr. Helton reiterated it was illegal to check for EC prior to a lottery.</p> <p>Ms. Reeves wanted clarification between the comparison of NC and Florida students. Mr. Walker outlined his concerns about the proposed schools lunch plan and how students may not be able to afford the meal provided by the school.</p> <p>Overall the Policy committee was concerned about the vagueness of the plan and its potential legalities. Board members present outlined there were 5 members on the board. Mr. Helton outlined he welcomed alternative thought; however, the group does not have a firm understanding of the requirements to run a charter school in North Carolina.</p> <p>Mr. Helton made a committee motion not to allow an interview for Carolina Experimental School. Ms. Reeves seconded. The motion passed unanimously.</p> <p>Mr. Walker made a motion to the full CSAB not to allow an interview for Carolina Experimental School. Ms. Reeves seconded. The motion passed unanimously.</p> <p>After the vote, the proposed applicant group questioned why they were not provided an opportunity to respond to any of the CSAB questions. Following the question, Mr. Walker made an alternate motion to provide an opportunity for the applicant to respond to the CSAB concerns. Ms. Turner seconded. The motion passed unanimously.</p> <p>The applicant was allowed to speak about the identification of EC students and the proposed board member outlined the credentials of its board members and felt that the application questions on identifying EC students asked the wrong question. Additionally, he outlined the fundamental issues of American education and the inflated and fraudulent grades of students in America. Also, the board chair for the proposed school, pointed out the proficiency of the students in NC and that there were flaws with the education system in NC. He further outlined the way the Chinese educate is the way the proposal is written. Also, more research between American and Chinese students was recapped by the proposed board member to the Policy Committee.</p> <p>The proposed board member outlined why he included the Florida information in the submitted application and the information was provided since the NC data was not available upon submitting the application and he wanted to provide a comparison.</p> <p>Mr. Walker asked direct questions about the differences between Chinese education and US education based on the research conducted. Also, the research provided was not an</p>
----------------------------------	--

Carolina Experimental School - Carolina Experimental School adopts evidenced-based best educational practices in the world to lead educational reform. It cultivates autonomous and disciplined lifelong learners who use time wisely to master basic skills, develop talents and seek great people's guidance to maximize individual growth and lead the change.

	<p>apples to apples comparison. Mr. Walker also questioned the rational of the proposed applicant group tearing down a system it proposed to open a school within.</p>
<p><b>Application Interview</b></p>	
<p><b>OVERALL</b></p>	<p>Mr. Walker referenced another Chinese immersion application submitted this round and the differences in quality between the application. The proposed board member provided an anecdotal of his scores on the Praxis II exams. He outlined natives of America did not perform as he did on the assessment which points to the problem in American education and the CSAB can choose to ignore it. Mr. Helton outlined we have a system we must work under and regardless of how you agree or disagree you must outline a legal application based on educating students in NC. Also, charter applicants must follow the rules and work within the system if you want them changed. The applicant group concluded that "everything in American education, including EC, is broken."</p> <p>Ms. Reeves made a committee motion not to grant an interview for Carolina Experimental School. Mr. Helton seconded. The motion passed 4 1 with Ms. Gibbs dissenting.</p> <p>Mr. Walker made a motion to the full CSAB not to grant an interview for Carolina Experimental School. Ms. Turner seconded. Mr. Maimone communicated he appreciated the passion and encouraged the board to rewrite and come back with a better proposal. Mr. Walker outlined the board may want to consider opening a private school. Mr. Sanchez communicated that some of the research discussed by the applicant group had validity. He discussed he would love to see the applicant group return and outline clearly how they would invest in the students it hope to serve. Mr. Sanchez encouraged the group to submit a revised plan in the next application round. Mr. Hawkes communicated he thought the CSAB may be a bit defensive and could learn a lot from the applicant group. He encouraged the proposed applicant group to come back with a better plan. The motion passed 8 2 with Mr. Hawkes and Ms. Gibbs dissenting.</p>