North Carolina State Board of Education Charter School

Application Rubric

Applicant: Carolina Royal Academy

Reviewers: #1 Austin Smigel; #2 Tim Hanser; #3 Jay Whalen (OCS); #4 Rob McOuat (EC), #5 Marshall Foster (EL)

Charter Application Evaluation Rubric

<u>**Evaluations and Criteria**</u>

The NC charter application review process is designed to ensure that all students in the state have access to a high-quality charter school. Each application will be reviewed by a team of internal and evaluators, and reviewer comments will be forwarded to the Charter School Advisory Board (CSAB). The CSAB will review applications, conduct interviews of applicants, and make a recommendation to the State Board of Education (SBE), which will then make a final decision to approve or deny the application.

Strong applications will have a clear and compelling mission, a strong educational program, a solid financial plan, effective governance and management structures, and a diverse board of directors with the capacity to execute the plan for the proposed school. In addition to meeting the criteria that are specific to each section, each part of the application should align.

Instructions to Evaluators

Reviewers should complete each rubric section based on the evidence provided in the application. There are five (5) total sections to complete:

- I.   Mission, Purposes, and Goals
- II.   Education Plan
- III. Governance
- IV. Operations
- V.   Financial Plan

Please note that there may be appendices to support information provided in the above sections. When reviewing an application, evaluators should assess the major strengths and areas of concern and provide comments/questions. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for operating a successful charter school. Responses should clearly align across each section of the application. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving all students. Reviewers should use objective language and complete sentences in their comments on the strengths and concerns/questions of each section of the application. Additional pages should be used as necessary. For example,

Strengths of the academic plan
> "The plan aligns with the overall mission and vision because…"
> "The chosen curriculum is research based and proven effective with the targeted population of students because…"

Concerns/Questions of the academic plan
> "The curriculum and daily schedule do not align with the mission and vision because…" "The discipline plan does not include provisions for students with disabilities."

Strengths of the governance plan
> "The governing board has a diverse skillset and will be able to support the school effectively."
> "The plan to recruit school leaders and teachers is robust and aligns with the mission of the school."

Concerns/Questions of the governance plan

"The governing board is comprised of only two people who do not have sufficient credentials to support school leadership."

Strengths of the financial plan

"The financial plan is sound, and the assumptions are consistent with the mission and vision of the proposed school."

"The budget includes contingencies for high dollar special needs students and funds are allocated in the budget document for such contingencies."

Concerns/Questions of the financial plan

"The budget includes a line of credit from ABC Bank, but no assurances were provided to support such an agreement."

"The proposed school assumes two buses in the first year, but there is no accompanying line item in the budget that allocates funds for purchasing buses nor is there any indication of salary and training for bus drivers."

Complete the summary page for each major section (Mission, Purposes and Goals, Education Plan, Governance, Operations, Financial Plan) after you have completed all of the subsections within the section. Type a summary of your analysis of each section into the box provided; it will expand as needed. This should be a paragraph outlining the overall strengths or concerns/questions of the application section as a whole. It should summarize your findings and not simply be cut and pasted from your subsection analysis.

Please also remember that all documents, including your individual review, will likely at some time be available to the public.

Application Contact Information

Application Contact Information		
Characteristics of a strong response: ● All questions are adequately addressed and complete ● Projected enrollment figures are tactical and realistic for the proposed region ● Strong rationale provided for year one enrollment and growth plan		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant completed all sections.	● 6,7,8
Reviewer #2	● The application clearly responds to Prompts 1-7 and 9-16.	● 6-8
Reviewer #3	● Applicant appears to be projecting a diverse student population.	● 8
Concerns/Questions		**Page**
Reviewer #1	● The enrollment projection may not directly align with the educational model proposed by the school. What was the rationale in having student number increases above the natural flow from year to year? ● What was the Boards role in the development of the application?	● 7 ● 8
Reviewer #2	● The submission identifies a third-party assisted in the preparation of the applicant (prompt 7). This person is also listed as the primary contact (prompt 5). However, in prompt 8, the response fails to describe how the third-party person will provide support for the applicant during the review process. ● Further, the applicant discloses that sections of the application were taken from a previous application, Team CFA: Pender (prompt 18), but fails to provide a detailed explanation for this, and fails to identify what sections are taken from a different application. Without this detail, it will be difficult to fully assess the capacity of the applicant team, and their ability to deliver the proposed educational program.	● 6 ● 8
Reviewer #3	● The applicant does not provide a sufficient rationale for the enrollment projections. Only states "looking at Wake County and Chatham County demographics". No additional evidence provided. ● Enrollment projections seem aggressive (525 in year 1 and 900 at capacity). What evidence gives the applicant confidence it can meet these projections? ● The application is largely taken from a previous application for TeamCFA: Pender. How is this application specifically tailored to the community and population it is proposing to serve?	● 8 ● 7-8 ● 8

Section 1.1 Mission and Vision		
Characteristics of a strong response: ● The mission statement defines the purpose of the proposed charter school ● The mission statement is clear, concise, compelling, and measurable. ● The vision provides a clear description of what the school will look like when it is achieving its mission. ● Response includes a compelling description and clear rationale for selecting the location and target student population. ● Completed enrollment summary and anticipated demographics charts with reasonable enrollment projections. ● Response fully justifies the projected student enrollment and the percentage of the ADM when compared to the LEA. ● Substantial evidence is provided to demonstrate educational need. ● Target population aligns with the proposed school mission.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The mission statement is clear and concise.	● 21
Reviewer #2	● The mission identifies its education model (inquiry-based learning), and, on a high level describes its purpose (life-long learning skills to prepare students for future education and work)	● 21 ●
Reviewer #3	● The mission is clear	●
Concerns/Questions		**Page**
Reviewer #1	● How will the applicant define "high-quality public charter school" in its vision statement? ● Applicant is not specific as to how "closely mirrors the student population of Chatham County" is defined. ● Enrolment figures differ from the budget projected figures. (In this section 70% Chatham County Students, 30% Wake County Students. Budget: 60% Chatham County and 40% Wake County). ● How will the proposed charter school's educational model meet the needs of the target population? ● #5 conflicts with the budget. ● Chatham County has made a commitment to innovation, digital learning, and computer science CTE courses as per their website. ● There is one letter of support. Were any surveys/local perspective parent meetings held? What is the rationale, other than the enrollment of other schools, to justify the scope and size of the school and its growth?	● 21 ● 21 ● 22 and 179 ● 22 ● 22 and 179 ● 22 ● 23
Reviewer #2	● The mission/vision statements are not responsive to the prompts, as they collectively fail to identify the students and community the applicant proposes to serve, and does not provide a clear illustration of what success	● 21 ● 21-22 ● 22 ● 22

	would like for the school and its students.	● 23
	● Further, the application fails to address prompt 3, as it does not outline anticipated demographics of the school, or how the school's demographics would be reflective of the district.	● 23
	● The application fails to address prompt 4 as it does not provide any information regarding enrollment trends and academic performance of surrounding districts, nor does it describe how the proposed model would meet the needs of the target population.	
	● The applicant also states that it would be the only school in Chatham County offering the proposed curriculum, yet Woods Charter School, located in the Chatham County section of Chapel Hill uses the Core Knowledge sequence https://www.coreknowledge.org/community/core-knowledge-schools/	
	● The response to Prompt 7 fails to provide concrete evidence of community engagement, and explicitly states that most board members do not live in the county where the school is proposed.The only evidence of support provided in Appendix A is a letter from a former elected officials, raising concerns that the applicant has not made efforts to develop relationships to establish support, and has not assessed potential demand.	
	● Further, the applicant references a different school in its response, Carolina Charter Academy, raising concerns that the application is unique, and specific to this application.	
Reviewer #3	● The applicant does not provide a description of the targeted student population.	● 21-22
	● The applicant does not address the academic performance of the surrounding schools.	● 22
	● The enrollment percentages by county do no match the budget.	● 22
	● The estimated enrollment from Chatham County is listed as 7.1%, but that is only for 315 students in year 1. At capacity, they would enroll 14% of Chatham County's population.	● 22
	● No specific relationships are outlined in questions 7, and no specific marketing strategies are outlined.	● 23
	● The only evidence of community support in the appendices is 1 letter from a former legislator	● appendix A

Section 1.2 Purposes of the Proposed Charter School		
Characteristics of a strong response: ● Clearly describes how the proposed charter school will achieve one or more of the six legislative purposes. ● Identified purpose(s) is/are meaningful, manageable, and focused on improving student outcomes. ● Purposes are clearly aligned to the proposed mission.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant meets the requirements of describing how the charter school will meet one of the legislative requirements. They are stating they will meet the requirements of providing professional opportunities, expanded school choice and increasing learning opportunities for all students.	● 24
Reviewer #2	● The applicant identifies three legislative purposes that the proposed school aims to achieve. It articulates a goal of having teachers function as teacher leaders and for these teachers to collaborate with peers across the state. The applicant also identifies expanded choice in Eastern Chatham County as aligned to the one of the legislative purposes, pointing out that no charter schools currently exist in Eastern Chatham County. These purposes appear manageable and could lead to improved student outcomes.	● 24
Reviewer #3	● The applicant addressed the legislative purposes they meet.	● 24
Concerns/Questions		**Page**
Reviewer #1	● While there are no charter schools in eastern Chatham County, the school is proposing to also market to students from Wake County. How many charters are located in western Wake county?	● 24
Reviewer #2	● While the applicant identifies working with peers across the state, it fails to articulate any evidence to suggest that these connections have been made, or to verify that there are other schools interested in such a collaboration. While the applicant uses the term "teacher leader", the applicant's response doesn't identify the type of leadership roles these teachers would have.	● 24
Reviewer #3	●	●

Section 1.3 Goals for the Proposed Charter School		
Characteristics of a strong response: ● Performance goals (academic or other) are clear, specific, measurable, attainable, time-specific, and focused on improving student outcomes. ● Clear and compelling process for setting, monitoring, and/or revising goals at least annually. ● Goals are clearly aligned to the mission and purposes.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The goals are measurable.	● 25,26
Reviewer #2	● The applicant identifies clear measurable, attainable, time specific goals focused on improving student outcomes.	● 25
Reviewer #3	●	●
Concerns/Questions		**Page**
Reviewer #1	● What are the academic outcomes of other schools that follow the same model in NC? Do the proposed schools goals correlate to attainable results? ● Should the school plan and have an intervention plan in place prior to opening that provides strategies for students that are below grade level rather than developing it within the first 30 days? ● Would it be appropriate to have a goal of increasing the representation from the county on the school's Board since no Board members live in Chatham County?	● 25 ● 25 ● 25
Reviewer #2	● It is unclear how the goals are aligned to the school's mission.	● 25
Reviewer #3	● Proficiency goals are based on the local LEA (ie 20 points above), but the local LEA data is not provided for reference. ● What is the board's process for evaluating and revising goals?	● 24 ● 25

Section 1 Mission, Purposes, and Goals Summary

Each part of your summary comments should, in a few sentences, provide a clear understanding of
your overall evaluation of the proposal as well as the most significant strengths and/or
Concerns/Questions. The summary comments for each section should support your rating for
the section and should not be simply cut and pasted from your subsection analysis.

Evaluation Summary for Entire Mission, Purposes, and Goals Section
Initial Application Review
Reviewer #1 Strengths/Concerns/Comments Summary While the proposed charter school has an educational model that they are proposing they do not state if that model has been successful and to what extent it has been successful in other areas of the state.   More importantly, there is a lack of evidence of community support and interest.   Lastly, there is a discrepancy in the proposed student population numbers as compared with the budget.
Reviewer #2 Strengths/Concerns/Comments Summary The school has identified a specific educational model and specific curriculum that it intends to use. However, the applicants fails to be responsive to several of the prompts. Further, it is unclear to what extent this is an original application, as it was disclosed that sections were taken from another application, without detailing what information was taken from another application (Team CFA: Pender), and the application misstates the name of the proposed charter school at least once(Carolina Charter Academy), suggesting that sections were simply copied and pasted from different applications. The application fails to provide any evidence that it has sought community feedback in order to gauge interest and demand, and makes claims of future collaboration without evidence that efforts have been made to identify partners across the state.
Reviewer #3 Strengths/Concerns/Comments Summary The school mission was clear, however the rationale for enrollment is insufficient. No evidence or data was presented to support the enrollment numbers or demographics of the school. The applicant was unable to describe the targeted student population. No recruitment strategies or established relationships were outlined. The rationale for the location of the school needs to be further explained.

Section 2.1 Instructional Program		
Characteristics of a strong response: • A clear and comprehensive explanation of the school's academic focus that is aligned with the school's mission and vision. • A clear and coherent description of the instructional program and instructional methods are provided. • The proposed assessment strategies align with the proposed instructional program. • Includes documented evidence that the proposed approach will lead to improved student performance for the school's target student population. • Instructional design offers clear and specific details that describe the basic learning environment, class size, and structure. • Curriculum framework and sample course scope and sequence are clearly presented and specific to the school's purpose, aligned with the school's mission, concentrated to support the target student population, and compatible with the North Carolina Accountability Model. • School calendar and student schedules meet NC requirements of 185 school days or 1025 hours or instruction. • Calendar and schedule support implementation of the academic plan and align with stated mission and vision. • Description of a typical day for teachers and students align with key priorities of the academic plan and the overall mission and vision of the school.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	• The school is proposing to add art, music and foreign language to ensure the students are well rounded. • Applicant understands the need for changing education due to a changing post-school work and life environment. • Applicant understands the importance of a prepared environment for the students.	• 28 • 28 • 29
Reviewer #2	• The narrative appears to provide a reasonable level of detail describing the instructional program.	• 27-34
Reviewer #3	• The applicant described the established curricula that will be used: Core Knowledge and Singapore Math	• 27-28
Concerns/Questions		**Page**
Reviewer #1	• What specific types of manipulatives are being proposed? • The Chatham County student teacher ratio appears to approximately be 15:1 (Chatham County School website data). Is a proposed student teacher ratio of 25:1 going to be sufficient? (Note: the applicant does state it will be lower due to the use of an assistant, but it will still be higher than the district schools). • If the instructional model builds on mastery and is sequential, how do the proposed enrollment numbers support incrementally adding students after opening? • What is the success of this educational model in other areas of the state?	• 29 • 29 • 29
Reviewer #2	• Appendix B only includes the Singapore Math curriculum	• 87-94

	outline for K-6. No other curriculum outline is provided for any other subjects or any other grades (the school proposes to operate as a K-8 by its third year) ● No Appendix C was included. ● Appendix D lacks sufficient detail to determine whether the proposed calendar meets minimum instructional time. It also is mislabelled, stating a 2020-21 start when the dates listed are for the 2021-22 school year. ● Appendix E lacks the required daily and weekly calendars	● ● 95-96 ● 97-98
Reviewer #3	● The applicant does not provide a description of instructional strategies and assessments. It is generally unclear what strategies are being implemented. (lecture is mentioned, but that is not always very engaging) ● What types are manipulatives will be integrated in classrooms? ● Applicant states that "the Sequence has consistently produced scholars who score better on tests". Where is this data? ● Generally, nothing is described in detail about what this looks like. What types of summer learning opportunities? What techniques and instructional strategies are taught in PD? ● What does a yearly schedule look like that gives small breaks to address student fatigue? ● How much instructional time is happening in the 6.75 hour day? ● Applicant does not describe a typical day in question 8.	● 27-30 ● 28 ● 30 ● 33 ● 34 ● 34

Section 2.2 Special Populations and "At-Risk" Students		
Characteristics of a strong response: ● An identified founding board member or school administrator with experience working with special populations. ● A clear process for identifying "at-risk" students, English Learner students, and intellectually gifted students. ● A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants. ● Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for "at-risk" students, English learners, and intellectually gifted students. ● A sound, compelling plan is evident to enhance the academic opportunities to meet the needs of "at-risk" students, EL students, and intellectually gifted students.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● Applicant states they will meet the needs of a student regardless of need in the least restrictive environment possible.	● 40
Reviewer #2	● The applicant states that the school will implement systems to identify and support students "at-risk"	● 35
Reviewer #3	● Applicant seems committed to ensuring a quality education for all students	● 35
Reviewer #4	● "We believe every child shall have the opportunity to be successful, in every class, every day."	● p. 35
Reviewer #5	● Communication in a language understood by the parents will be used. ● There is an understanding of the EL identification process, screening and the use of modifications and methodology to meet the needs of the students.	● 36-37
Concerns/Questions		**Page**
Reviewer #1	● What experience does the Board have with SWD and Special Education/504 programs?	● 36
Reviewer #2	● The applicant does not identify a board member with experience working with special populations, and does not provide a pre-opening plan.	● 36
Reviewer #3	● Board has no experience with EC, EL, at risk, etc. ● It is unclear how any of the plan to meet the needs of at risk students works. ● Who is the EL liaison for testing? Is that in the budget? ● The applicant states they will use "web-based" programs for ELs, but does not list any. What is being used? ● It is unclear how the school will ensure the required amount of instructional hours for beginner and intermediate ELs will be provided.	● 35 ● 35 ● ● 36 ● 36 ● 36
Reviewer #4	● Plan is vague regarding plan for at-risk learners. Mentions evidence-based interventions and increasingly intense instruction/intervention. Plan does not indicate how still will be identified as need more intensive	● p. 35 ● p. 35

	instruction/intervention or what types of interventions will be used. ● Plan does not identify an administrator or board member with experience working with special populations.	
Reviewer #5	● ELs are identified for screening via the Home Language Survey (HLS). The EL identification assessment approved by NC is either the WIDA W-APT/ or Screener depending on grade level. ● Annual proficiency testing is required via the ACCESS for ELs 2.0 ● See: https://sites.google.com/dpi.nc.gov/ncels/el-data/el-identification ● It is mentioned that a student will have an individual plan but In order to plan ahead for serving ELs, we recommend developing the school's Language Instruction Educational Plan (LIEP). The LIEP is required as part of the Charter Performance Framework. See A5 -EL component. ● See:https://sites.google.com/dpi.nc. ● It is mentioned on pg 60 that a part-time experienced EL Teacher will be used, so as they have no full-time dedicated staff for ELs, consider adding an all-staff PD targeted to English Learners e.x. Sheltered Instruction such as SIOP.	● 36-37 ● 60

Section 2.3 Exceptional Children

Characteristics of a strong response:
- A clear process for identifying students with disabilities.
- A viable plan to provide students with special needs with instructional programs, practices, and strategies that ensure access to the general education program and academic success.
- Requirements and processes for monitoring services to students in need and plans to exit students that attain sufficient progress.
- An understanding of, and capacity to fulfill, State and federal obligations and requirements pertaining to students with disabilities.
- A realistic plan for hiring licensed and highly qualified personnel including service providers, nursing, and educational assistants.
- Evidence of adequate resources and staff to meet the needs of all students, including professional development for teachers.
- Articulated plan for how the school will utilize and evaluate data to inform instruction and evaluate academic progress for students with disabilities.

Initial Application Review		
Strengths		**Page**
Reviewer #1	● Applicant states they will follow all federal and state laws and regulations relating to SWD. ● Applicant will have a system in place to monitor and ensure the implementation of all IEPs. ● Applicant has a nationally normed test for use in monitoring and benchmarking. ● Is the NWEA MAP tool the only assessment being proposed to determine if a student is at-risk?	● 40 ● 40 ● 41 ● 42
Reviewer #2	●	●
Reviewer #3	● Applicant identifies a number of community resources. ● NWEA MAP testing will be used for benchmarks	● 38 ● 40
Reviewer #4	● Good use of community resources (officer Friendly Program) ● Plan describes use of NWEA MAP for benchmarks.	● pps. 38-39 ● p. 40
Concerns/Questions		**Page**
Reviewer #1	● Does the applicant have a plan for students whose needs may exceed all federal and state funding resources? ● How does the SRO and community student / family support partnerships relate to how the school is going to ensure there are systems in place and needs met at the school?	● 40 ● 41
Reviewer #2	●	●
Reviewer #3	● The applicant mentions contracting for certain services. Who are those service providers? ● how did the applicant come to a 10% EC projection? Or did they just use the state average? ● Will the EC director also teach and be in charge of a caseload? What are the factors that determine the number of EC teachers? How many students per caseload?	● 41 ● 40 ● 40

	● Outside of NWEA MAP, it is unclear what data and assessments the school will use to track EC student progress. MAP is only 3x per year. WHat more frequent data will be used?	● 41
Reviewer #4	● For sections 4&5, you should describe how the IEP will describe specially designed instruction that will meet the child's unique needs. ● Confidential records section should refer to FERPA. That is the law the governs confidentiality of student's educational records.	● p. 41 ● p.42

Section 2.4 Student Performance Standards
Characteristics of a strong response: ● Academic achievement goals are rigorous, measurable, and realistic and set high standards and expectations for student learning. ● Academic goals contribute to the stated mission and vision of the school. ● Clear and compelling process for setting, monitoring, and/or revising academic achievement goals. ● Assessment selection will provide sufficiently rich data for evaluation of the academic program and align with state standards. ● Assessment plan details the collection and analysis of individual students, student cohorts, and school level performance throughout the school year, at the end of the academic year, and for the term of the charter. ● A process for using data to support instruction is clearly articulated, with detailed plans to provide adequate training for teachers and school leaders. ● Evidence of clear, rigorous promotion/retention and exit policies and standards. ● Student attendance goals are realistic and plans to ensure high rates of student attendance and address chronic absenteeism are clearly outlined.

Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant states a goal to never achieve less than a B school grade and maintaining a proficiency level of 70% academic growth per year.	● 41
Reviewer #2	●	●
Reviewer #3	●	●
Concerns/Questions		**Page**
Reviewer #1	● Applicant does not address how they will implement standards or protocols for SWD in regards to promotion.	● 42
Reviewer #2	● The applicant states that there will be no social promotion, but fails to provide plans for addressing significantly overaged students if they fail to be promoted. ● The applicant states that all students must be at or above grade level before exiting 8th grades. This is not realistic and may in fact run counter to IEPs of special education students. Further, the applicant provides only a vague statement of after school and summer learning opportunities for students who do not meet this standard.	● 42 ● 43
Reviewer #3	● Only NWEA MAP is listed for assessments, which only happen 3x per year. Common assessments are stated but not described. Need more detail on assessment strategies. ● Who handles the small group and one-on-one instruction for remediation? Teachers? If so, when? ● What happens when some scholars are inevitably not "at or above grade level"? Are the other measures for student promotion?	● 42 ● 42 ● 43

Section 2 Education Plan

Section 2.5 School Culture and Discipline		
Characteristics of a strong response: ● A clear vision for school culture or ethos that will promote a positive academic environment and will reflect high levels of academic expectation and support. ● Coherent plan for creating and sustaining the intended culture for students, teachers, administrators, and parents from the school's inception, and for integrating new students and families as they arrive. ● Plan for how school culture will embrace students with special needs. ● Student discipline plan that provides for effective strategies to support a safe, orderly school climate and strong school culture while respecting student rights. ● Evidence of a legally sound school discipline plan that outlines discipline procedures, suspension and expulsion procedures, and appeals processes. ● Thoughtful consideration of how the discipline policies protect the rights of students with disabilities.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	●	●
Reviewer #2	● The applicant states that it will commit resources to professional development to ensure that staff will be able to implement the desired school culture.	● 43
Reviewer #3	● The applicant will use the Core Virtues and MTSS frameworks.	● 43-44
Reviewer #4	● Discipline section refers to positive culture	● p. 43
Concerns/Questions		**Page**
Reviewer #1	● If the NC ACCESS grant is not received is $10,000 enough for PD? ● Has this model been successful in TeamCFA: Pender and how?	● 43 ● 43-45
Reviewer #2	● The applicant states that some portions of this section were taken from a previous application (Team CFA Pender) without detailing to what extent that application was copied, leading to concerns that this section is not customized to the applicant's proposed school. ● While the Discipline section states that the school will follow applicable laws with respect to manifestation determinations, it provides no other discussion of who students with disabilities will be embraced in the school's culture. ● Overall, the section is vague, and does not demonstrate a clear plan for how the school's culture will be fostered. ● The applicant claims that it will commit significant resources to professional development, but the budgeted amount for staff development ranges is a flat $10,000 per year for each school year, working out to just under $300 per instructional personnel in Year 1 to under $175 per instructional personnel in Year 5.	● 45 ● 43-45 ● 43-45 ● 43
Reviewer #3	● The applicant lacked enough detail to fully explain the discipline plan.	● 44-45

	● It is unclear how the school will set expectations, what opportunities for development they will offer, what the core virtues are and how it is integrated. ● Who is on the school improvement team and what are their roles and responsibilities?	● 45 ● 45
Reviewer #4	● Discipline protections for Students with Disabilities are mentioned on p 40 but are not included in the discipline section. Make sure your discipline policy includes the requirements for Manifestation Determination Review and continued services while child is removed from school.	● p. 43

Section 2 Education Plan Summary

Each part of your summary comments should, in a few sentences, provide a clear understanding of your overall evaluation of the proposal as well as the most significant strengths and/or Concerns/Questions. The summary comments for each section should support your rating for the section and should not be simply cut and pasted from your subsection analysis.

Evaluation Summary for Entire Education Plan
Initial Application Review
Reviewer #1 Strengths/Concerns/Comments Summary   The program is based on a model that is currently in operation in various charter schools in the state and there should be data that indicates its success, strengths and outcomes. Additionally, because the application has portions that were specifically replicated from a charter application of a school in operation, TeamCFA: Pender, the applicant should be able to provide additional data about the implementation of that charter school.
Reviewer #2 Strengths/Concerns/Comments Summary While the applicant appears to have a narrative that clearly articulates the school's overall education plan, it fails to provide key details, including: an excessively vague school calendar; no weekly or daily calendar as required, an incomplete curriculum sequence, no information about electives, promotion policies that do not have clear plans for how to support students not meeting promotion requirements, and no plan of how to support overaged students (due to a no social promotion policy). Further the promotion plan may run counter to student IEPs, which, in turn, me be in violation of state and federal laws. Overall, the plan does not appear to be responsive to the needs of students with special needs, both from an academic and a school culture perspective.
Reviewer #3 Strengths/Concerns/Comments Summary The Education Plan is missing extensive details about the instructional methods, assessment strategies, special populations support, and discipline strategies. The use of Core Knowledge, Singapore Math, and Core Virtues is commendable, but the application was entirely devoid of implementation details and specifics. Additionally, nothing was tailored to the specific student population.

Section 3.1 School Governing Body/Section 3.2 Governance		
Characteristics of a strong response: ● Evidence the proposed board members will contribute the wide range of knowledge, skills, and commitment needed to oversee a successful charter school, including but not limited to educational, financial, legal, and community experience and expertise. ● Strong understanding of the roles and responsibilities of a governing board, including structure, size, powers, duties, and expertise that aligns with the school's mission and vision. ● Proposed structure is likely to ensure effective governance and meaningful oversight of school performance, operations, and finances. ● Clear, appropriate plans for the board to evaluate the success of the school and school leader. ● Documentation of a clear structure of the governing board is outlined in an organization chart. ● Section includes description of selection and removal procedures, term limits, meeting schedules, and powers and duties of board members, including a conflict of interest policy. ● Plans for meaningful board training. ● Clear, compelling plans to ensure parents have access to the governing board, including a grievance policy that is fair, transparent, and a plan for communicating the process. ● Sound plan and timeline for board recruitment, expansion, and orientation of new members.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● Applicant has a concise organizational structure. ● Application has defined roles of the board. ● Applicant has a Board training schedule. ● Bylaws include an indebtedness clause	● 100 ● 47,48 ● 51,52 ● 157
Reviewer #2	● The application generally demonstrates an understanding of board structures, and the board's roles and responsibilities. ● Proposed board training appears robust.	●
Reviewer #3	● The applicant has plans to develop subcommittees to handle certain areas of governance.	● 53
Concerns/Questions		**Page**
Reviewer #1	● Has the applicant tried to recruit founding board members form Chatham County? ● Applicant does not state that there is a nepotism policy imbedded in the conflict of interest policy. ● The conflict of interest policy is not stated.	● 47 ● 152 ● 152
Reviewer #2	● The applicant makes reference to a grievance policy, but does not include one or provide a detailed outline of a draft policy ● The applicant's attached organizational chart (Attachment G) lacks sufficient detail and is not responsive to the prompt. ● Attachment H includes brief bios of board members and not resumes, and more than one of the bios provides far less detail than would be provided in a resume. As such it is not responsive to the prompt. Several of the Charter School Board Member Information Form were incomplete and lacked detail in specific responses.For	● 54 ● 100 ● 102-119 ● 146 ● 155 ● 158 ● 47 & 159 ● 153

	example: Jerry Guerrier did not respond to question 1 of the board mission and values section, some of the responses within that section were not specific, and his responses within the governance section do not show alignment with how several components within the narrative; Jiansun Niu's responses to the governance questions are not aligned with components of the narrative; Chen Wang did not respond to question 3 of the governance section, several of her responses were vague, and some of her responses in the governance section are not aligned with components of the narrative. ● Chen Wang's Background Check form certification statement is filled in incorrectly. She signed both lines (one certifying she has no convictions, and the other certifying that she does have convictions) ● The by-laws state that one of the board members will serve as Treasurer (section 5.1), but no proposed board member is identified as the Treasurer, and no identification or explanation of this position being absent is articulated in the narrative (as required by the application prompts). ● The by-laws make mention of a conflict of interest policy, but the policy is not included within the by-laws (as required) ● The board list on P.47 states that Greg Bounds is the vice-chair, but the meeting minutes on P. 159 lists him merely as a member (nobody present was identified as vice-chair, but there is one board member not present at the meeting). ● By-laws expressly limit the number of parents on the board to two (section 2.2). Why?	
Reviewer #3	● No members of the board live in Chatham County. Are there any direct relationships to the community? ● There is a general lack of education and legal experience on the board. What additional areas of expertise would the board recruit for? ● The organizational chart in appendix G is very vague and does not provide sufficient detail of organizations relationships.	● 50 ● ● appendix H ● appendix G

Section 3.4 Staffing Plans, Hiring, and Management		
Characteristics of a strong response: ● Compensation packages, system, and strategy that are likely to attract and retain strong staff. ● Recruitment and hiring strategy, criteria, timeline, and procedures that are likely to result in a strong staff that are likely to result in a strong staff and are well suited to the school. ● Effective planning for unsatisfactory leadership/teacher performance and turnover.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	●	●
Reviewer #2	● The application appears to have a clear strategy for recruiting and hiring staff.	● 58
Reviewer #3	●	●
Concerns/Questions		**Page**
Reviewer #1	● Is the number of operational support staff sufficient for the proposed school size? ● Missing positions in the projected staff chart as compared to the outline.	● 55 ● 55,56
Reviewer #2	● The applicant's staffing plans are inconsistent. The table on P. 55 includes positions not listed in the staff list included on P.56, and the staff list on P.56, in turn, includes positions not listed on P. 55. The table on P.55 includes a position not included in the budget, and the budget includes positions not included on P.55. Further, there is an inconsistency in the number of people budgeted for one of the positions, and the number of people listed in the table on P.55. The list on P.56 includes a position that is not in the budget, and the budget, in turn, includes positions not included on P. 56. These inconsistencies impact critical positions that would have an impact on the applicant's ability to successfully implement it's proposed model. The list provided on P.58 is also inconsistent with the aforementioned sources on P.55, 56 and the budget. ● The proposed teacher salaries on P.58 are 35-50,000 for Core teachers, and 40-60,000 for EC Teachers. The low-end of these ranges are a concern and are likely insufficient to attract talent. The Head of School salary range of 75-80,000 seems insufficient to attract a Head of School that meets the applicant's criteria for candidates as outlined on P.60 of the application.	● 55,56, 58, and budget ● 58,60, and budget
Reviewer #3	● The staffing plan is not outlined clearly enough to determine if it will provide sufficient capacity for the school. ● There is finance officer listed in the budget but not in the staffing chart ● No EL teacher is listed in the staffing plan. Applicant states they will provide a part-time (p 60), but is that sufficient to provide services?	● 55-56 ● 55; budget ● 55

	- The recruitment plan is not detailed and comprehensive. - What are all the specialized classroom teachers? What is the breakdown of roles? - Are the proposed teaching salaries competitive? Especially in Wake and Chatham Counties? - The recruitment plan needs further detail.	56 55 58 56

Section 3.5 Staff Evaluations and Professional Development
Characteristics of a strong response: ● Professional development standards, opportunities, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement. ● Thoughtful plan for professional development in the areas of special education and EL students, including the implementation of IEPs, discipline of students with disabilities, and communication with EL families. ● Detailed evidence that all school staff will receive ongoing focused professional development to effectively implement the school's mission, instructional methodologies, and education program are included. ● Details in this section align with proposed budget. ● Plan for supporting, developing, and annually evaluating school leadership and teachers that is likely to produce and retain a successful staff.

Initial Application Review		
Strengths		**Page**
Reviewer #1	●	●
Reviewer #2	● The applicant appears to have a clear idea of when professional development will take place and who will be responsible for delivering the professional development training.	●
Reviewer #3	● The applicant has built in PD days both before and during the school year.	● 63
Concerns/Questions		**Page**
Reviewer #1	● Is $10,000/year sufficient to meet the needs of staff professional development and training? Why does that figure not increase as the number of staff increase? ● Is the professional development plan sufficient to meet the needs of ensuring the school is implementing the Core Knowledge Sequence authentically? How long has it taken other schools that follow this sequence and method taken to train their staff? Has that training been successful and what shared resources will the school use?	● 185 ● 63,64
Reviewer #2	● The application does not reference any professional development oriented in the areas of special education and EL students. ● The proposed professional development plan, while clear in the anticipated number of days and hours allotted per year and prior to each school year, is not cohesive, with no clear plan to ensure that goals can be met. It reads more like a word salad of ideas and industry jargon, with no clear ideas or plan to ensure effective training	● 63-64 ● 63-64
Reviewer #3	● The PD plan outlines a number of topics, but does not give specifics for development, particularly around curriculum. What does "developing leaders in the Core Knowledge curriculum" look like?	● 63

	● The plan lacks specifics on PD opportunities for EC, EL, and at-risk students.	● 63
	● It is unclear what "daily job-embedded professional development" from the Instructional coach look like? Generally, the instructional coach role is not well defined.	● 64
	● When do the school visits for teachers happen?	● 64

	Section 3.6 Enrollment and Marketing		
Characteristics of a strong response: - Articulated student recruitment and marketing plan, timeline, and enrollment policy that will provide equal access to all interested students and families, including those in poverty, academically low-achieving students, students with disabilities, and English Language Learners. - Details in the section align with proposed budget.			
	Initial Application Review		
Strengths			**Page**
Reviewer #1	● the Applicant has a through understanding of the pre-opening timeline and activities that should take place.		●
Reviewer #2	● The school has a clear idea of how they intend to recruit and market their school with specific timelines and targets.		●
Reviewer #3	● A number of marketing strategies are outlined.		● 65
Concerns/Questions			**Page**
Reviewer #1	● What is the specific role of the marketing consultants in reaching school application numbers? ● How are the emails going to be collected for the email blasts in the application phase if a parent interest survey has not been conducted?		● 65 ● 65
Reviewer #2	● The targets in the earlier stages feel insufficient to achieve the stated goals of 1000 applicants and a waitlist of >25% above capacity for each grade. For example, the ready to open phase, from March - December 2020, has a stated goal of 400 letters of intent to enroll. It is unclear how the school will then be able to convert that to 1000 applications for enrollment between December 2020 and August 2021. ● The applicant makes mention of recruiting events at various types of organizations, but does not specifically identify organizations that they would engage, or how their current board has the skills and connections necessary to effectively engage those organizations.		● 65 ● 65
Reviewer #3	● The applicant could provide more details on the specifics for some of the marketing strategies. Particularly what neighborhoods they would target and how they would engage the community. ● Is the $20,000 marketing budget sufficient to cover the marketing consultants and website development? ● No mention of translated materials or platforms.		● 65 ● 65; budget

Section 3.7 Parent and Community Involvement		
Characteristics of a strong response: ● Compelling outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support. ● Description of existing community resources and partnerships already formed that will benefit students and parents and that include a description of the nature, purposes, terms, and scope of services of any such partnerships; and evidence of commitment from identified community partners including documentation of pledged support, if available.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	●	●
Reviewer #2	● The applicant proposes using a broad range of communication channels to disseminate information.	● 67
Reviewer #3	● A number of strategies are outlined in the marketing timeline.	● 65-66
Concerns/Questions		**Page**
Reviewer #1	● Because this section mirrors the TeamCFA: Pender application closely, was and is that process successful?	● 67
Reviewer #2	● The plan is vague and does not incorporate specific strategies or stated goals. ● There is no evidence of existing support from any community partners.	● 67 ● 67
Reviewer #3	● How is the $20,000 marketing budget sufficient to cover the costs of consultants and the development of a website? ● What external factors were considered to ensure this plan was specifically tailored to the community? ● No translation services or language barriers are addressed.	● 65; budget

Section 3.8 Admissions Policy		
Characteristics of a strong response: ● Enrollment policy that complies with NC state law, SBE policy, and the Charter Agreement.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	●	●
Reviewer #2	● The enrollment policy appears to be in compliance with the law.	●
Reviewer #3	● Policy is generic and lawful.	● 68
Concerns/Questions		**Page**
Reviewer #1	● Is one day sufficient time to accept an open slot if offered?	● 70
Reviewer #2	● The open enrollment period is inconsistent. On P. 66 open enrollment is identified as being from December 2010 to August 2021, but on P. 68 open enrollment is identified as being from December 1, 2020 to January 15, 2021. ● The applicant states that if a student is selected from the waitlist, their parent/guardian will have one business day to respond. This is excessively restrictive for parents. ● The applicant provides no response to the prompt regarding re-enrollment.	● 66,68 ● 69
Reviewer #3	● Is one business day a realistic turnaround for parents?	● 68

Section 3.8b Weighted Lottery (If Applicable)		
Characteristics of a strong response: ● The applicant outlines a weighted lottery process that does not illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability. ● The weighted lottery process is not based on geographic boundaries, such as zip code or current public school zones. ● The weighted lottery or limited lottery process is unique to the school's unique mission and provides a thorough explanation of why the school is choosing to use the process. ● Applicant provides a thorough description of the processes and procedures it intends to use to implement the lottery. ● Applicant provides underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The school is proposing to have a weighted lottery.	● 70
Reviewer #2	●	●
Reviewer #3	● The applicant plans to reserve 35% of seats for educationally disadvantaged students.	● 70
Concerns/Questions		**Page**
Reviewer #1	● Clarification is needed with the terms of the weighted lottery. What does "...educationally (economically disadvantaged students)" mean? ● How will the board assure the vendor is "successfully" executing the lottery based on the above terms? ● Who are the industry experts identified to facilitate this process?	● 70 ● 70 ● 70
Reviewer #2	● The weighted lottery is for economically disadvantaged students. This does not appear to clearly relate to the mission of the school. ● There is no description of the lottery process or procedure, it merely states that the lottery will be conducted by an unnamed third party and that they will consult with industry experts to facilitate the process. ● No underlying research is provided to support the request.	● 70
Reviewer #3	● No description of the lottery process is described. Generally this section is lacking details. ● While this is a requirement of the NC ACCESS Program, if that is the only rationale, will the applicant move forward with a weighted lottery if not awarded an NC ACCESS subgrant?	● 70 ● 70

Section 3 Governance and Capacity Summary
Each part of your summary comments should, in a few sentences, provide a clear understanding of
  your overall evaluation of the proposal as well as the most significant strengths and/or
  Concerns/Questions. The summary comments for each section should support your rating for
  the section and should not be simply cut and pasted from your subsection analysis.

Evaluation Summary for Entire Governance and Capacity Plan
Initial Application Review
Reviewer #1 Strengths/Concerns/Comments Summary If there is a need for a charter school in eastern Chatham County why are there no Board members from that area?   Additionally, the applicant should be able to verify this need through market data from prospective parents and attendance at prospective parent meetings.
Reviewer #2 Strengths/Concerns/Comments Summary
Reviewer #3 Strengths/Concerns/Comments Summary While the general governance structure is sound, the make-up of the board is concerning. No members live in Chatham County and there is little education expertise and no legal expertise. It is unclear if the staffing plan is sufficient to implement the education plan, and there are inconsistencies between the staffing plan and the budget. The professional development, marketing, and parent engagement plans lack detail and fail to address the needs of EC, EL, and at-risk students and families.

Section 4.1 Transportation Plan		
Characteristics of a strong response: ● Clear description of a transportation plan that supports daily transportation, extracurricular activities, field trips, etc. ● A comprehensive oversight plan that identifies school staff responsible for this oversight. ● Description of how the school will arrange transportation for special needs students where necessary ● Demonstrated familiarity with state and federal regulations relating to provision of transportation services to students.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The school states that transportation will not be a barrier for students to attend the school.	● 71
Reviewer #2	●	●
Reviewer #3	● The applicant plans to provide transportation as an option and says it will not be a barrier.	● 71
Reviewer #4	● Plan mentions that students with transportation as a related service will receive transportation.	● p. 7
Concerns/Questions		**Page**
Reviewer #1	● The transportation plan is insufficient to meet the projected ⅓ of students that are anticipated needing transportation. ● How was it determined that 2/3rd of the students will arrive by car if a prospective parent survey has not occurred? ● How many students' families will need gas cards? Is that accounted for in the budget appropriately?	● 71 ● 71 ● 71
Reviewer #2	● The applicant states they anticipate ⅔ of students will arrive by car, and about 115 will need bussing. This accounts for only 465 of the projected 525 students in year 1. The application offers no explanation for how these remaining 60 students would arrive to school. ● Based on budgeted staffing levels, it appears that the school will operate only 2 buses in Year 1. This raises concerns about how long students will be expected to be on the bus each day, and how far they will be expected to travel to get to a bus stop. The narrative states cluster stops up to 25 miles. Does this mean that students would be required to travel up to 25 miles to get to a bus stop? ● The applicant states that it will offer gas cards for parents who carpool. There are concerns of legality of this approach, as well as sufficient funding if it is legal. The amount of expenses budgeted for fuel, $20,000 in Year 1, does not appear to be sufficient to cover bus fuel costs and the cost of gas cards for families. Even a modest $5 in gas cards for 100 families (less than ¼ of students projected to arrive by car) on a weekly basis	● 71 ● 71, Budget ● 71, Budget ● 71, Budget

	would cost about $18,000. ● The school also states that it will contract with yellow cab companies or transportation services to provide transportation, but it does not appear to be included in the budget. ● The school states it will provide transportation for students who have transportation services in their IEP, but do not budget for these services. ● The plan makes no mention of transportation services for field trips and/or extracurricular activities, and the amount budgeted for transportation is not sufficient to cover those services.	
Reviewer #3	● Only two buses with cluster stops does not seem sufficient for the targeted population, especially at 35% ED? How many stops will the buses make. ● How does the applicant know that ⅔ will arrive by car? ● Gas cards do not seem to be in the budget. ● Who is responsible for maintenance and inspections? ● EC busing is not budgeted, and the plan to find the funding is not sufficient.	● 71 ● 71 ● Budget ● 71 ● 71; budget
Reviewer #4	● Plan indicates that finds for IEP transportation will be obtained from Special State Reserve. SSR may or may not pay for this. Make sure you have a flexible budget for thee costs.	● p. 7

Section 4.2 School Lunch Plan		
Characteristics of a strong response: ● A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines. ● A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement. ● Adequate funds allocated for school nutrition, aligned with the target student population. ● A plan to ensure compliance with applicable state and federal regulations.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The school has a stated commitment to ensure that no child lacks a daily meal.	● 72
Reviewer #2	●	●
Reviewer #3	● A significant amount of funding is allocated for school lunch.	● budget
Concerns/Questions		**Page**
Reviewer #1	● The plan lacks operational details or proof of ability to implement. ● No validation for the estimated cost associated with catering lunches is provided. ● Small food pantry is not defined.	● 72 ● 72 ● 72
Reviewer #2	● The plan is excessively vague, with no description of how food services will be offered, or how the meals will meet nutritional guidelines. ● The amount budgeted would provide lunch for roughly ⅓ - 40% of students. No projections participation rates were provided to support that this is sufficient to meet demand. The school's projected economically disadvantaged student population is projected to be 35%, suggesting that the amount budgeted is inadequate.	● 72 ● 72 ●
Reviewer #3	● Not enough detail is provided to assess the feasibility of this plan. ● What kitchen facilities will be necessary to carry out this lunch plan? ● The plan to provide lunch to ED students i vague and it is unclear how ED students will not be identifiable from the larger population.	● 72 ● 72 ● 72

Section 4.3 Civil Liability and Insurance		
Characteristics of a strong response: ● Plan to secure comprehensive and adequate insurance coverage, including worker's compensation, liability, property, indemnity, directors and officers, automobile, crime, errors and omissions, and any other required coverage. ● Insurance quote provided aligns with budget assumptions.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● Insurance quote matches the budget amount and appears to meet the criteria of the state.	● 73
Reviewer #2	● The insurance quote appears to provide an adequate amount of coverage, and the amount in the quote aligns to the budget.	● 73
Reviewer #3	● Adequate coverage is provided.	● 73
Concerns/Questions		**Page**
Reviewer #1	●	●
Reviewer #2	● However, one of the insurance assumptions does not align with the budget. The insurance assumes a payroll of ~$1.2 million, but the payroll amount budgeted in Year 1 is over $1.5 million, 25% more than what was assumed in the insurance quote. This will directly impact the cost of workers' compensation insurance.	● 73, 173
Reviewer #3	●	●

Section 4.4b Start-Up Plan		
Characteristics of a strong response: ● Compelling plan for leading the development of the school from post-approval to opening, including identification of a capable individual or team to lead the planning and start-up. ● Adequately addresses potential challenges ● Detailed start-up plan specifying tasks and timelines (which are aligned with a sound start-up budget, if applicable)		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The Board's perceived largest challenges are identified in the start-up plan.	● 74
Reviewer #2	● The startup plan has a reasonable high-level timeline, and identifies what it believes to be its two greatest challenges: head of school selection and securing a facility.	● 74
Reviewer #3	● The applicant identified challenges.	● 74
Concerns/Questions		**Page**
Reviewer #1	● Identification of private funding is not specified. What amounts are going to be requested and from who? What are the funds going to be used for? What are the eligibility requirements and are they going to be met for the NC ACCESS grant?	● 74
Reviewer #2	● The start-up plan provides insufficient details and specificity, provides no budget for start-up, does not identify the parties who will be involved in the process in general, or aspects of it in detail, and provides no discussion for how it will anticipate and/or address potential challenges.	●
Reviewer #3	● The start-up plan is generic and lacks detail. No specific tasks are listed under each bucket. It does not outline who is responsible for completing each task. ● How would budget constraints limit this work before school begins?	● 73-74 ● budget

Section 4.5 Facility		
Characteristics of a strong response: ● Facility plans are reasonable and adequately meet the requirements of the educational program and anticipated student population. ● A sound plan and timeline for identifying, financing, renovating, and ensuring code compliance for a facility.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant states they understand the regulatory approval process to build a school.	● 75
Reviewer #2	● The applicant is clear in its intent to build a new facility and has some concrete details about their site and space expectations	● 75
Reviewer #3	● The applicant has clear plans to build and seems confident to navigate the regulatory, permitting, and contracting processes.	● 75
Concerns/Questions		**Page**
Reviewer #1	● Is the classrooms size going to accommodate 25 students per class based on the projected student teacher ratios? ● The timeline appears aggressive if a site has not been identified at this time.	● 75 ● 75
Reviewer #2	● The timeline is unrealistic for the building to meet their July 1, 2021 target completion. New construction of a ~50,000 sf school, especially since the applicant does not have a site, plans, permits, or financing will almost certainly take the roughly 18 months that they anticipate it will take. ● Classroom square footages (700 square feet) are excessively small. NC standards recommend classroom square footages ranging from 850-1200 square footage for K-8. ● Projected class sizes of 25 students (75 students per grade are projected, with 18 classroom teachers in Year 1), there would be 28 square feet per student, well below industry standards. https://www.schoolclearinghouse.org/pubs/FacilityGuidelines%20(September%202014).pdf ● The plan does not include a contingency plan ● The plan does not include cost estimates or potential financing sources ● The applicant states that another application was used in part to complete this section, without detailing which parts, leading to concerns that the section is not customized to this proposal	● 74-76 ● 75 ● 75 ● 75 ● 75 ● 75
Reviewer #3	● The financing structure need further clarification. If the building will be leased back to the applicant, what are the terms of the agreement?	● 75

	● It is unclear exactly where the applicant is in the acquisition process right now. Has land been identified? Contract bids submitted?	● 75
	● The applicant states in budget narrative that they have until "12/2019 to decrease cost and size of facility". The charter may not be approved by then, nor will any enrollment have been finalized. What factors are taken into account to make this decision?	● 77
	● No facility contingency plan is included.	● 75

Section 4 Operations Plan Summary
Each part of your summary comments should, in a few sentences, provide a clear understanding of
your overall evaluation of the proposal as well as the most significant strengths and/or
Concerns/Questions. The summary comments for each section should support your rating for
the section and should not be simply cut and pasted from your subsection analysis.

Evaluation Summary for Entire Operations Plan
Initial Application Review
Strengths: There are gaps in the transportation and nutrition plans that do not appear realistic.   The building plan appears excessively aggressive and risky since the facility contingency plan is lacking details.
Concerns/Questions: The plan is excessively vague and unrealistic. The proposed facility approach, new construction, presents an unrealistic timeline and proposes classroom spaces that are inadequate and potentially not in compliance with NC school building standards. The start-up plan has no budget and is unresponsive to potential challenges the applicant may face.

Section 5.1 Charter School Budget		
Characteristics of a strong response: ● Applicant has identified one or more LEA(s) and outlined a realistic revenue projection (state, local, federal) over the next five years. ● The enrollment projection aligns with the Total Student Enrollment projections located in Section 1 of the application. ● Applicant has provided assurances of identified "other funds" or "working capital." ● Applicant provides a realistic budgetary projection in regard to personnel. ● Budget worksheet contains assumptions and reasonable budget numbers that reflect rent, utilities, maintenance, insurance, and build-out costs. ● Detailed budget assumptions that include the impact of the anticipated number of students who receive free or reduced-price lunches. ● Complete, realistic, and viable five-year operating budget ● Applicant has provided a realistic assessment of projected source of revenue and expenses that ensure the financial viability of the proposed school. ● The projection is consistent and aligns with all proposed sections of the application.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The local, State and Federal revenue appears correct. ● Investment in technology in line with mission/vision	● 185
Reviewer #2	● The applicant has identified two LEAs, and has realistic revenues projected over the first five years of operation.	●
Reviewer #3	● Full enrollment of 900 students would bring in significant state and local funding	●
Reviewer #4	●	●
Concerns/Questions		**Page**
Reviewer #1	● The budget projections by LEA for the student numbers do not align with the initial part of the application (i.e. number of students from Chatham Co vs. Wake Co.). ● Student operations staff appears low based on school size. ● Retirement costs appear to be low based on staff size. ● Custodial Supplies do not increase y1 to y2 even with the increase in students/staff. ● Staff Development and EC Services Contract appear low based on student numbers. ● School Psychologist, maintenance budget do not increase with the increase of students. ● Facility lease/mortgage appears high ($75,000/month or 19% of projected revenue). ● Surplus appears excessive ($943,660 or 19% of projected revenue y1). ● Cost conflicts with previous section Cost per sq. ft (listed earlier as 15%). ● Estimates and services provided for financial and educational services contract amounts not provided (combined total of $100,000). Who will provide those services? How were the estimates determined?	● 177,179 ● 181 ● 182 ● 185 ● 185 ● 183 ● 186 ● 75 ● 183

Reviewer #2	● The applicant does not budget for a sufficient number of classroom teachers. The narrative states that there will be 3 classrooms per grade from K-6, necessitating 21 teachers, but only budgets for 18. A similar error is made in Year 3, with 31 teachers budgeted for 32 classrooms. ● The applicant does not articulate how the enrollment assumptions were developed. ● There are other positions listed in the narrative that are not included in the budget, including a Special Education Director and deans. ● While the school has budgeted for significant reserves, the number of errors and omissions including, but not limited to unbudgeted positions, an insufficient transportation budget, insufficient food budget, and no amount budget for electricity use, these reserves will likely be significantly less than anticipated. Further, since the school budgeted for full enrollment, any failure to meet enrollment projections will negatively impact the school's projected reserves as well. ● Health care costs are on the low-end of typical expenses in Year 1, and the annual increase of 3% is much lower than industry trends and projections. ● Several expenditure assumptions cannot be verified. For example: facilities costs cannot be validated, because no projections or estimates are provided from a potential developer.	● 77, budget ● 77
Reviewer #3	● It is unclear where student and faculty supplies are included in the budget. Is faculty furniture included in the "furniture" line? or is that just students? ● Does the "computers" line included staff? ● IT services are not budgeted for. ● Is this a 1:1 school based on the computer science curriculum? Does the tech costs provide each student with a device? What exactly is included in the software line item? ● What are the financial and educational services outlined in the budget? They are the exact same amount. ● How can you ensure the teacher salaries will be competitive? The staffing in the budget does not match the staffing chart. ● The projected enrollment by LEA in the budget does not match the application narrative.	● budget
Reviewer #4	●	●

Section 5.2 Budget Narrative		
Characteristics of a strong response: ● Sound contingency plan to meet financial needs if anticipated revenues are lower than expected. ● Individual and collective qualifications for implementing the financial plan successfully, including capacity in areas such as financial management, fundraising and development, and accounting. ● Detailed budget narrative that clearly explains reasonable, well-supported revenue and cost assumptions, including grant/fundraising assumptions, identification of the amounts and sources of all anticipated funds, property, or other resources (noting which are secured vs. anticipated and including evidence of firm commitments where applicable).		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant has determined a break-even point.	● 77
Reviewer #2	● The founding board has members with experience in financial planning and management.	● 78
Reviewer #3	●	●
Concerns/Questions		**Page**
Reviewer #1	● Criteria for contractor selection, services provided by the contractors is lacking detail. ● What is the basis for anticipating $75,000/month in facility/lease payments in year 1? Why does that figure increase and cap at $125,000/month in y3?	● 79 ● 183
Reviewer #2	● The budget narrative does not articulate any revenue or cost assumptions, and overall lacks specificity in a number of responses to the application prompts.	● 77-79
Reviewer #3	● The 25:1 student teacher ratio listed in the budget narrative is high. ● The contingency plan mentions reducing personnel and slashing organizational wants. What specifically would get cut and how would that affect implementation of the education plan? ●	● 77-79

Section 5.3 Financial Compliance		
Characteristics of a strong response: ● Detailed financial procedures, policy, or other reasonable assurance that the proposed school will have sound systems and processes in place for accounting, payroll, and independent annual school level financial and administrative audits.		
Initial Application Review		
Strengths		**Page**
Reviewer #1	● The applicant states they will have redundant systems in place for accurate and accountable accounting.	● 79-80
Reviewer #2	●	●
Reviewer #3	● Outlines plans for fiscal compliance.	● 79-80
Concerns/Questions		**Page**
Reviewer #1	● Qualifications and identification of the financial services company not defined. ● Specific policies not listed.	● 80 ● 79-80
Reviewer #2	● The application has an unstructured list of procedures that lack sufficient organization or detail to ensure that the school will have sound financial controls ● The applicant states some segments were taken from a previous application without specifying which parts or how that application is a reasonable source. As such, there are concerns that the application is not customized for this proposed school.	● 79-80
Reviewer #3	● The answers to this section are generic and lack detail.	● 79-80

Section 5 Financial Plan Summary

Each part of your summary comments should, in a few sentences, provide a clear understanding of
 your overall evaluation of the proposal as well as the most significant strengths and/or
 Concerns/Questions. The summary comments for each section should support your rating for
 the section and should not be simply cut and pasted from your subsection analysis.

Evaluation Summary for Entire Financial Plan
Initial Application Review
Reviewer #1 Strengths/Concerns/Comments Summary The budget is lacking support materials to justify many of its major line items.   There appears to be inconsistency in the manner in which the budget changes over time, i.e. some line items increase others do not. There is also a concern that the projected student population is different in the budget compared to what is proposed in the application.   While the applicant does have almost a 20% surplus at the end of year one there are sections in the budget that if they are underestimated will reduce the surplus significantly.
Reviewer #2 Strengths/Concerns/Comments Summary Numerous errors were identified within the budget, including, but not limited to, unbudgeted positions, unrealistic cost assumptions, and unbudgeted costs for services. While the proposed budget as substantial reserves included, these errors and omissions will significantly reduce these reserves, and any failure to meet enrollment projections will erode the reserves further. The narrative often lacks specificity or sufficient organization to ensure that effective financial management and controls will be in place.
Reviewer #3 Strengths/Concerns/Comments Summary There are inconsistencies between the application narrative and budget. A number of line items seem to be missing or need to be further defined. It is unclear what some of the expenses are or what exactly is included in certain line items. The student-teacher ratio is high, and the inconsistencies in the staff plan make it unclear to assess the school's capacity to implement the full education program.