



North Carolina State Board of Education Charter School

Application Rubric

Applicant: Revolution Academy Bunker Hill

Reviewers: #1: Shannon Stein; #2 Ellenois Watkins; #3 Claire Porter; #4 Rob McQuat (EC); #5 EL

Charter Application Evaluation Rubric

Evaluations and Criteria

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 external 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	<ul style="list-style-type: none"> ● The school plans on utilizing Core Knowledge curriculum, which has a history of providing strong foundational skills 	<ul style="list-style-type: none"> ● 9
Reviewer #2	<ul style="list-style-type: none"> ● The initial application review questions are complete and adequately addressed according to the required information. The plan provides enrollment figures that are projected based on the targeted area of students to be served the first year and expand the following four years. The grade levels will begin with projected numbers and end with a total enrollment for an expected capacity that is realistic for the proposed area. The plan includes several rationales for the number of students and grade levels to be served in year one that includes location, similar charter schools, comparable programs to district schools, community support and factors for natural transition grades. The applicant intends to target families with children in more than one or two grades which can increase the likelihood for the school to open with the maximum anticipated student enrollment. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Core Knowledge (CK) sequence and classical framework; emphasis on recess twice (2) a day, but appears to be very short recess; full-time instructional coach; foundational pillars clear (rigorous academic, parental involvement, character education, student responsibility); provides a choice in a district with some very low performing district schools ● Projected demographics look to mirror the demographics of Guilford County; ● Transportation to community stops & free and reduced lunches will support socioeconomic diversity, would like to see that fleshed out more; ● BOD has a good mix of strengths (attorney, former school admin, experience with budgets and financial oversight) and local, for the most part 	<ul style="list-style-type: none"> ● 20-23 <p>Page 24</p> <p>Page 52</p>
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● The growth plan seems very ambitious and not tactically sound (single staff per grade when starting so lack of collaboration) as the school will be at full capacity by year #3. 	<ul style="list-style-type: none"> ● 7
Reviewer #2	<ul style="list-style-type: none"> ● The rationale for year one enrollments and the projected growth plan did not include the number of each grade 	<ul style="list-style-type: none"> ●

	<p>levels for the total of students to be served based on the total projected enrollment.</p>	
Reviewer #3	<ul style="list-style-type: none"> • May be ambitious on enrollment prospects (Y1 309) if only 175 said they would enroll; consider that many will not enroll despite survey responses; proximity of two Revolution Academies (14 miles away, opening in 2020); as well as Cornerstone (22 miles). Piedmont Classical only serves 9-12 (8 miles). How is Revolution Academy: Bunker Hill (2021 open) distinct from Revolution Academy (2020)? 	<ul style="list-style-type: none"> • Page 7 and page page 105

Charter Application Special Request

Application Addendum: Proposed Management Organization (EMO or CMO)		
Characteristics of a strong response: <ul style="list-style-type: none"> • The rationale for contracting with an EMO/CMO is evident. • A persuasive explanation that the proposed relationship with the EMO/CMO will further the school's mission and educational programming. • A clear delineation of the roles, relationships, and responsibilities between the EMO/CMO, the governing board, lead administrator, and public charter school employees. • The rationale includes detailed information regarding the financial and academic performance of other charter schools managed by the EMO/CMO. • A copy of the executed management agreement was included in the application. • Evidence that the management company has the capacity to support the proposed school in finances, academics, and operations. 		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • No significant strengths noted 	•
Reviewer #2	<ul style="list-style-type: none"> • The contracting with the EMO/CMO is based on it being local, commitment to partnering with parents and having staff members with experiences in education leadership and charter development. The board has extensive governing responsibilities and the EMO/COM will comply according to the specifics of meeting the goals and responsibilities as defined by the governing board. The specific roles of the EMO/CMO are defined in the plan to include employing and overseeing the staff, manage the day to day operations and meet the measurable program goal outcomes. 	•
Reviewer #3	<ul style="list-style-type: none"> • Charter Management Agreement included in application 	• 93
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Partnership with new CMO with no proven track record of sound fiscal mgt. and/or effective oversight • Was the CMO firm chosen because it was local and/or are there any personal connections that may have influenced the decision 	• 20
Reviewer #2	<ul style="list-style-type: none"> • The EMO/CMO has not managed any schools in NC previously and have no proof of rigorous standards for financial performance, qualified audits or proven fiscal compliance of issues regarding qualifications. There is no comparable school success data included in the application, to examine, relative to education and financial management or the company being a good fit for the targeted population of students and ensuring their ability to improve the overall achievement of the targeted population. The Charter Develop Solutions in a new CMO without a financial history which is concerning with no evidence to validate their capacity to support the proposed school in finances, academics, and operations. 	•
Reviewer #3	<ul style="list-style-type: none"> • New EMO, Charter Development Solutions, has no 	• 21

Charter Application Special Request

	<p>track record or evidence of sound fiscal oversight</p> <ul style="list-style-type: none">• Executive Director of Charter Development Solutions (proposed CMO) is M. Sauer, who is also the listed Principal of Revolution Academy (to open in 2020) the 'sister school' to the proposed Revolution Academy: Bunker Hill. Please review for any conflict of interest and how will she manage one school as a CMO and be the Principal of the other?	
--	---	--

Charter Application Special Request

Application Addendum: Replication		
Characteristics of a strong response: <ul style="list-style-type: none"> • The application contains a strong rationale for replicating an existing charter school, including evidence that this model will be effective in the proposed setting, and the governing board is a good fit for the proposed charter school. • The rationale includes detailed information regarding the financial and academic performance of the existing charter school model. • The applicant provided all required evidences • If requesting fast-track replication, applicant meets all requirements outlined in SBE policy. 		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> • No significant strengths noted 	
Reviewer #2	<ul style="list-style-type: none"> • 	
Reviewer #3	<ul style="list-style-type: none"> • N/A as this is not a replication application 	Page 14
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Does not indicate they are a replication, but references a “sister school” which does not open until 2020 	20
Reviewer #2	<ul style="list-style-type: none"> • There is no rational evidence included in the plan for replicating an existing charter school or for requesting fast-track replication of an existing charter school model. It is not certain that the charter school model has structure and content that can be successful without having a blueprint of management activities, strategies or outlined structures to replicate successful outcomes. There is a lack of evidence included in the plan for determining if the governing board is a good fit for the proposed charter school. 	
Reviewer #3	<ul style="list-style-type: none"> • N/A Not a replication application 	14

Section 1 Mission, Purposes, and Goals

Section 1.1 Mission and Vision		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Multiple recesses planned for ES students 	<ul style="list-style-type: none"> ● 26
Reviewer #2	<ul style="list-style-type: none"> ● The mission and vision statements describe the potential contributions of the proposed charter school, which includes the development of academically successful students who will be active participants in the community. The school mission is based on the four pillars (rigorous academics, parental involvement, character education, student responsibility), and the evidence will be measurable by the achieved results and will determine if the mission is accomplished. ● The applicant contends that the charter school population will be pulled from areas that include students from many backgrounds, races, and income levels, rather than targeting any specific group. The diversity of the student population is intended to provide a more robust and meaningful learning environment. There is data included in the plan that provide projected enrollment for the demographic groups who will attend the charter school. The plan describes the demographics of students within the targeted areas which aligns with the reasonable enrollment projections for the charter school. ● There is data provided that substantiates poor academic performance in math and reading among students in the district schools. The student low proficiencies are reasons for parent dissatisfaction and for wanting options and choices about having charters schools their child can attend. 	<ul style="list-style-type: none"> ●

Section 1 Mission, Purposes, and Goals

Reviewer #3	<ul style="list-style-type: none"> ● Targeted marketing, location of the school, transportation and providing of lunch are put forth as evidence of efforts to meet the target population (35% educationally disadvantaged, 35% African American, 8% Hispanic/Latino, 57% white); ● 727 students represent 1.5% of the LEAs ADM; ● Core Knowledge curriculum (3rd school in Guilford COunty and third public school to use a classical framework in K-8)will anchor grammar stage of the trivium and support the dialectic stage-offered up in contrast to local LEA of Guilford who focuses on"personalized learning and technology integration." ● Latin & logic in middle school, cursive in grades 3-5, recess 2x a day K-5, and optional shortened K 	<ul style="list-style-type: none"> ● 24 ● 25 ● 25 ● 26 ● 27
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● School states that a goal will be to have "high levels of reading proficiency" (pg. 25), but the measurable goal only has 58% of the student body at proficient after five years 	<ul style="list-style-type: none"> ● 25 & 28
Reviewer #2	<ul style="list-style-type: none"> ● The applicant did not provide the student enrollment of the LEA, which prevents determining the justification of the charter school's projected student enrollment of 727, which represents only 1.5% of the LEA student enrollments. ● The plan lacks details of alternate procedures for recruiting of students and ensuring the enrollment projections is met. The targeted marketing procedures cannot ensure that the enrollment goals are achieved, which dictates the need for alternate strategies. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Proficiency levels are not ambitious (58% reading and 56% math by Y5) and may yield a C ● LEAs numbers ● How will you meet enrollment projections 	<ul style="list-style-type: none"> ● 28

Section 1 Mission, Purposes, and Goals

Section 1.2 Purposes of the Proposed Charter School		
Characteristics of a strong response: <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Option of the shortened kindergarten day 	<ul style="list-style-type: none"> 27
Reviewer #2	<ul style="list-style-type: none"> The charter school plans details three methods for achieving legislative mandates that includes new professional opportunities for teachers, parent and student educational opportunities and an improved learning environment. The professional opportunities for teachers are intended to offer teachers the chance to become an integral part of the educational process and a chance to earn bonuses and raises based on student learning outcomes. Parents will have the opportunity to select a smaller learning environment as an option for their children who have not been successful in a traditional school setting and to receive more individualized instructional attention. The intention of the charter school is to provide an educational program that has been proven successful for all students. 	<ul style="list-style-type: none">
Reviewer #3	Meets several of the six legislated purposes of charters	<ul style="list-style-type: none"> 27
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> No significant concerns noted 	<ul style="list-style-type: none">
Reviewer #2	<ul style="list-style-type: none"> There is information that only one school in Guilford is using Core Knowledge curriculum which is of the focuses for the charter school, but in a previous section is was stated that three schools in Guilford are using the curriculum, beginning in the lower grades. It is not clear what content incorporates a classical model of instructional delivery and how it will improve student delivery in the county. Additional details can further explain what constitutes a solid foundational base of knowledge and skills that will help promote future success. The plan lacks details on how the teacher merit-based system will be evaluated and will avoid unbiased decision results. It is unclear what classical model is referenced in the plan as the proven educational programs of success that is used in the charter school structure. 	<ul style="list-style-type: none">

Section 1 Mission, Purposes, and Goals

Reviewer #3	<ul style="list-style-type: none">• Merit based system (raises) needs to be more transparent	<ul style="list-style-type: none">•
-------------	--	---

Section 1 Mission, Purposes, and Goals

Section 1.3 Goals for the Proposed Charter School		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Strong fiscal goal 	<ul style="list-style-type: none"> ● 30
Reviewer #2	<ul style="list-style-type: none"> ● The goals, strategies and expected outcomes to be achieved by the charter school programs are clear, specific and measurable. The precise goal outcomes are clearly aligned with the four pillars that are detailed in the mission statement. There are methods included in the plan for setting, monitoring and revising goals as needed that includes regular monthly progress meetings, an improvement team to review and make recommendations and the Board of Directors to collaborate and undated school-wide goals. These methods to review the school progress and performances clearly align with the mission and purposes. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Eight (8) goals written for the four (4) pillars in the mission with a monitoring every semester, and updating as an ongoing charge; ● Goal 8 of a surplus of at least 3% of revenue and fund balance of 60 days of expenses by Year 5; ● SMART goals for the most part with metrics of some goals in need of fleshing out 	<ul style="list-style-type: none"> ● 30-31 ● 28-31
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● How will goal #1 be tested in the lower grades? (I.e. one year growth for each student) ● How will goal #4 be measurable? (I.e. “students learn important virtues”) 	<ul style="list-style-type: none"> ● 28 ● 29
Reviewer #2	<ul style="list-style-type: none"> ● The plan lacks realistic time-specific timelines for allowing successful program implementation and assured measurable outcomes. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Metrics of measuring goals 	<ul style="list-style-type: none"> ● 28-29

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
<p>Reviewer #1 Strengths/Concerns/Comments Summary While many of the goals are good aspirations, there does not seem to be a clear SMART correlation for many. Even if Goal #3 is met after 5 years, the school will barely be a “C” school. There is also not a clear correlation between Goal #1 & #3 will be measured by all students.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary The applicant provides a mission and vision for the charter school that clearly aligns with the significant school operational goals.</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary Will achieve one or more of the six legislative purposes of a charter; Goals on proficiency and growth will be difficult to measure and are not ambitious, despite the rigorous approach. Proficiency in Year 5 or Reading at 58% and Math at 56% will put them in the 55-69 range of a “C”</p>

Section 2 Education Plan

Section 2.1 Instructional Program		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● 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 of 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	<ul style="list-style-type: none"> ● Strong pillars; challenging academics, parental partnerships, character education, & student responsibility ● Student intervention plan has a clear, strong sequence 	<ul style="list-style-type: none"> ● 32 ● 37
Reviewer #2	<ul style="list-style-type: none"> ● The applicant describes traditional approaches to improved educational attainment for the targeted population. The charter school core knowledge curriculum description includes such contents as a robust math curriculum, formal grammar instruction, foreign language instruction, writing program, etc., which are intended to be different from the LEA focus. The common assessments are intended to measure daily student learning performance, identify strategies to help struggling students, redirect instruction delivery, and to track academic performance. There are details included in the plan that describes the number of students in each classroom and the core for the teacher instructional delivery, which includes the approximate minutes per day. The academic program content structure includes math and English elements for delivered creative lessons and research-based content areas that are intended to support purposeful lessons. The academic curriculum contents are clearly outlined in the plan and are directed towards the stated mission and vision to support the targeted student population. 	<ul style="list-style-type: none"> ●

Section 2 Education Plan

	<ul style="list-style-type: none"> • The model for instruction for the charter school demonstrates proven successful best practices and multiple strategic designs. The school calendar and student schedules, meet the same number of school days and instructional hours as mandated by the State. The typical number of subject delivery and the structure of the school day and week aligns with other area schools, that includes half days that are built into the calendar for teacher workdays and conference schedules. The school day time schedules for students and teachers includes mandated instructional block instructional time depending on the subjects, enrichment time, tutoring and instruction in study group skills. The academic schedule is specifically defined and the instructional day begins with designated time for assembly, classroom cycles between core classes, recess, and common planning time for teachers in each grade level. The schedules for the student and teacher instructional day align with the overall mission and vision of the charter school plan. 	
Reviewer #3	<ul style="list-style-type: none"> • Calendar of 187 days (complies with law), with ample days for teacher professional learning; • balance with two (2) recesses; • specials and core classes and blocks (math and reading) align with rigorous classical approach; • 4 pillars of Challenging Academics, Character Education, Parental Partnerships and Student Responsibility; • common assessments and PLC structure; • enrichment with financial literacy; • instructional method to include Socratic, EDI, cooperative learning & directed independent (a good blend and depends on learning goal); • Bill of Rights will provide free PD on ‘positive moral virtues’ and character virtues; • phonics based reading program (research based); • Saxon Math or Eureka • ratio of 1:20 or 1:27; • ability grouping for math for students who need a stretch; • unencumbered planning time; • classroom assistants after Y1; • Latin & Logic added to 7/8 grade after Y1; • recognition that the sequence may not provide support for the NCSCOS and need for modifications to be successful on EOG/EOC (page 35) 	<ul style="list-style-type: none"> • 32-37
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Other than the “Bill of Rights Institute” what other character education curriculum will be utilized • Will Spanish stop being offered in MS after all ES? 	<ul style="list-style-type: none"> • 32 • 34
Reviewer #2	<ul style="list-style-type: none"> • The designated curriculum programs that are described 	<ul style="list-style-type: none"> •

Section 2 Education Plan

	<p>in the plan are not distinctly different from the NC essential curriculum standards. The plan is not totally accurate regarding the few schools in NC who have implemented the Core Knowledge curriculum among lower grades, which is not mentioned as part of the charter school plan. The information is not totally correct regarding NC schools not having unique contents covering valuable skills, such as keyboarding and financial literacy or recess times. The NC Standards includes curriculum that includes outlined contents that dictates different topics, materials and lesson plans that teachers used in their classroom delivery and do not have to search the internet for content that aligns with state standards. There is possibly something unique about the Latin and Logic instruction, however, there is limited details in the plan about the content. The fact that the applicant states that students will be introduced to common content that will expand the knowledge and understanding of different topics is no guarantee for improved academic performance.</p>	
<p>Reviewer #3</p>	<ul style="list-style-type: none"> ● World Languages? Spanish ceases in 5th grade and option then becomes Latin with the addition of 7th & 8th grade? ● 	<ul style="list-style-type: none"> ●

Section 2 Education Plan

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	<ul style="list-style-type: none"> ● School support team (SST) clearly outlined with a plan 	<ul style="list-style-type: none"> ● 43
Reviewer #2	<ul style="list-style-type: none"> ● The plan identifies a board member who has extensive experience working with special populations as a teacher and an administrator over many years. ● There are strategic processes for identifying and addressing the special population of students that includes analyzing student performance assessment data outcomes and implementing intervention plans; home language surveys, monitoring, testing and use of ELL teachers; provided challenging, academically rigorous program, classroom differentiation, individualized instructions and acceleration in content delivery. These methods are intended to enhance opportunities to meet the needs of the special population of students attending the charter school. ● There are detailed plans on how the school will evaluate data to inform instruction and evaluate academic progress for the special population of students. The plan includes providing information in the enrollment packet for existing students who have previously received special education services, preliminary evaluations by the School Support Team, requesting and reviewing student records from previous schools. The review of student’s records will ensure that the proper academic opportunities are available to meet the needs of the targeted students. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● MTSS model will allow SST to use prevention & early intervention; Tiers are articulated ● One BOD member has a background in education and has “extensive experience working with special populations”; one is an attorney who may be able to provide guidance on IDEA/EC/ discipline and EC students 	<ul style="list-style-type: none"> ● 41-44

Section 2 Education Plan

	<ul style="list-style-type: none"> ● EL student identification and supports ● 10% population and two EC teachers in Y1; good to see budget includes resources for additional personnel as well as projected EC contracted expenses; ● All EC teachers will be highly qualified & possess an NC Special Education teacher certification; 	
Reviewer #4	<ul style="list-style-type: none"> ● Plan describes MTSS model 	<ul style="list-style-type: none"> ● p41, p. 49
Reviewer #5	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● No significant concerns noted 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● No real AIG plan (although charters not required to have an AIG program); move-up math program (acceleration); no option for Credit by Demonstrated Mastery (even students who may be performing high above grade level will not be allowed to miss content); would like to hear more about providing the full continuum of services (general classroom, resource, separate setting) as well as 1:1 ● Would like to hear more about identifying students who are 'at risk' and what the "appropriate interventions" which will be put into place are, Tier 3 	<ul style="list-style-type: none"> ● 42-48
Reviewer #4	<ul style="list-style-type: none"> ● More specifics about how students will be identified for more intense interventions, who will provide the interventions, what interventions? 	<ul style="list-style-type: none"> ● p. 42-48
Reviewer #5	<ul style="list-style-type: none"> ● ELs are identified for screening via the Home Language Survey (HLS). The EL identification assessment approved by NC is the WIDA W-APT/ Screener. ● 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 ● Even if you do not expect any English Learners (ELs) to enroll in year one, an EL may enroll at any time. 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. 	<ul style="list-style-type: none"> ● 41-42

Section 2 Education Plan

Section 2.3 Exceptional Children		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● There are clear processes outlined in the plan for identifying students with disabilities that includes the review of requested student records from previous school, preliminary evaluation by the School Support Team, which includes parental involvement, and continued monitoring of students suspected of needing special assistance. ● The applicant provides detailed plans for providing students with special needs access to the general education program. The plan includes an individual education plan with developed resources needed to adjust and amend instruction to meet their needs, hiring trained EC teachers to deliver the core curriculum to these students, assign a case manager for coordinating available services and continued monitoring to ensure the correct implementation of the IEP and to use to determine the exit of students that attain sufficient progress. It is evident that the applicant has a clear understanding of the state and federal obligation requirements that pertain to students with disabilities with the implementation of the multiple processes for serving the disability population. ● The applicant states that there are plans to contract with reputable and experienced service providers who are qualified to work with this targeted population of students. 	●

Section 2 Education Plan

	<ul style="list-style-type: none"> • The plan includes information relative to resources being available to meet the needs of all students that includes additional instructional supplies, additional assistance in the regular classroom setting and regular classroom teachers will receive staff development in best practices for instructional delivery of the general education curriculum to students with disabilities. • The applicant defines several methods to ensure that each student receives all accommodations, related services and regular education instruction. The development continued monitoring and evaluation of the Individual Education Plan, which includes the parents, will inform interested parties of the needs of each student. 	
Reviewer #3	<ul style="list-style-type: none"> • 10% population and two EC teachers in Y1 but may not be realistic; glad to see budget includes resources for additional personnel as well as projected EC contracted expenses; • All EC teachers will be highly qualified & possess an NC Special Education teacher certification; 	•
Reviewer #4	•	•
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Based on average state #'s & the number of low-SES students, the EC projection is too low...will there be enough staffing? • Requiring EC staff to provide quarterly progress in addition to normal school reporting seems excessive 	<ul style="list-style-type: none"> • 44 • 45
Reviewer #2	<ul style="list-style-type: none"> • The applicant includes a line item for the project personnel needed to service the disabled population of students, however, no providers have been previously identified within the service area. 	•
Reviewer #3	<ul style="list-style-type: none"> • 10% EC on low side, likely closer to 12/13%; may wish to also budget for a 3rd EC teacher; • How will school comply with Child Find, onus on school to get the message to stakeholders; • No mention of FERPA; • SDI within MTSS would be helpful; • Homebound policy or procedures (?) and how will children who are removed receive continued services during period of removal 	• 46-48
Reviewer #4	<ul style="list-style-type: none"> • Child Find section does not describe how school will let constituents know about Child Find responsibilities (posters, website). • Confidentiality section (records) should refer to FERPA. • Questions 5&6 should mention that IEPs describe specially designed instruction designed to meet the student's unique needs. 	<ul style="list-style-type: none"> • p. 43 • p. 44 • p. 45 • p 45 • p. 48

Section 2 Education Plan

	<ul style="list-style-type: none">● Progress reports for IEPs should be provided at least as frequently as report cards.● Discipline section should include protections under IDEA including manifestation determination review and continued serves during removal.	
--	---	--

Section 2 Education Plan

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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The academic plan design includes teacher staff development training, core curriculum development that includes reading and math and best practices that can help students attain academic success. The plan outlines instructional strategies to help students learn to express and communicate, provide teachers with methods in classroom management, provide intensive academic intervention for identified students, using frequent formative assessments, and to create lesson plans for the delivery of instructional content based on student performance data. The development and implementation of a Personalized Education Plan for students at risk of failure is a method to directly assist individualized students. These clearly defined performance details are aligned with the state standard academic programs. ● The applicant describes a three Tiered instructional intervention plan to be used for students who are not meeting or achieving grade level standards through core instructions. These interventions are designed to meet student needs in specific areas of deficiency in small group settings and are addressed outside the regular instructional schedule. ● The applicant provides a precise plan for promoting or retaining students based on meeting or not meeting grade level requirements. The promotion criteria 	●

Section 2 Education Plan

	includes intervention and support, along with the final decisions being made with input from the principal, teacher, parents and other staff on whether or not to retain the student. The charter school presents existing standards for graduating all students that are clearly defined and includes requirements for mastering course contents and meeting grade level and state mandated requirements.	
Reviewer #3	<ul style="list-style-type: none"> ● NEWA MAP is computer adaptive assessment that will provide formative feedback to teachers as to where each student is at that moment; EOG goals better than Guilford averages by Y3 and better than state averages by Y5; measurable but not ambitious; promotion & retention policies & procedures will be in school handbook and on website 	<ul style="list-style-type: none"> ● 46
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● “RABH will provide a rigorous course of student designed to prepare students for a lifetime of achievement”...EOG goals are not consistent with that statement. ● Promotion standards seem non-measurable (“demonstrate strong reading, writing, listening, etc.”); needs more specific promotion requirements 	<ul style="list-style-type: none"> ● 46 ● 47
Reviewer #2	<ul style="list-style-type: none"> ● The plan lacks a process for using data to support instruction and adequate training for the teachers and school leaders. ● There are no clarified methods included in the plan for ensuring high rates of student attendance or to address chronic absenteeism among the targeted students. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● EOG proficiency goals do not match with the rigor of the mission/stated school goals; Reading 46%/math 44% ● Would like to hear more about identifying students who are ‘at risk’ and what the “appropriate interventions” which will be put into place are ● Attendance plan/absenteeism? ● Exit standards need more support/fleshing out 	<ul style="list-style-type: none"> ● 46-48

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	<ul style="list-style-type: none"> ● Morning meetings seem to be congruent with reinforcing RABH pillars 	<ul style="list-style-type: none"> ● 48
Reviewer #2	<ul style="list-style-type: none"> ● The applicant describes a clear vision that promotes a positive academic environment through both academic and character building among the students. The defined values and behaviors defined are intended to be exemplified from all members of the charter school environment. There are plans for implementing the school culture through modeling the values daily, learning and reinforcing expectations during weekly assemblies, which are intended to help acclimate the students to what is expected. ● There is a detailed school discipline plan that promotes the student conduct codes governing effective discipline procedures, suspension and expulsion procedures, behavioral interventions and support for students with disabilities and policies disseminating due process rights. The charter school’s inclusion of a character development program, positive behavior supports, clear consequences for infractions of rules and the four disciplinary levels outlined in the student handbook are tools that are necessary for a safe and orderly learning environment. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● “Stereo focus on academics & character”, clear classical education culture & ethos ● Plan for acculturating stakeholders includes assemblies and for students coming later, the addition of a student guide; ● MTSS framework for behavioral intervention, Code of Student Conduct will be “visually apparent” throughout school 	<ul style="list-style-type: none"> ● 48-50 ●

Section 2 Education Plan

	<ul style="list-style-type: none"> ● 4 levels of process articulated ● Discipline of EC students reflects an understanding need for manifestation determination meetings ● Would expect the section on behavior management/discipline for EC students will need to be fleshed out in more detail ● Procedural due process recognized (explanation of rights, including the appeal & grievance process) 	
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● No significant concerns noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The plan lacks information relative to how the school culture will embrace students with special needs. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Less a concern as much of an expectation for further fleshing out of : Making sure that EC students and the discipline process with an EC student whose behavior is found to be a manifestation of his/her disability is well understood and articulated in policy/procedure and in the parent/student handbook; policies and procedures around continued receipt of service during period of removal; Homebound policies and procedures (?) 	● 50-51

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
<p>Reviewer #1 Strengths/Concerns/Comments Summary While there seems to be a clear path for building culture, the applicant continues to lack a correlation between goals/mission and having measurable benchmarks that will determine whether those goals are being met.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary The applicant presents relatively clear and comprehensive explanations throughout the plan for the academic focus of the charter school and aligns strategies for the instructional program. There are details throughout the plan that ensure that academic opportunities will be available to meet the needs of all students and viable resources have identified. The fact that the applicant did not specifically identify personnel who will specifically be hired to service the special needs population is a concern.</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary Strong character and culture plan yet expectations and goals for performance seem less than ambitious. I would like to know more about which formative assessments (assessment for learning) teachers will use to guide instruction and measure growth throughout the year; although curricular flexibility is a given, NC EOG and EOC will measure proficiency on NCSCOS and I am not seeing much, other than “ will receive professional development in the interpretation and use of the NWEA data to inform and align instruction. Teachers will also use common assessment to measure student learning and adjust instruction as needed.” Exceptional children staff/services needs more clarification</p>

Section 3 Governance and Capacity

Section 3.1 School Governing Body/Section 3.2 Governance		
<p>Characteristics of a strong response:</p> <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● School has clear plan to get parent feedback regularly 	<ul style="list-style-type: none"> ● 54
Reviewer #2	<ul style="list-style-type: none"> ● The applicant presents the initial members of the organization who are responsible for the operation of the charter school from both business and education perspectives. The contracted agency is responsible for the day to day operations of the school and for recruiting qualified professionals. The CMO’s responsibility also includes ensuring the school will be an educational and operational success and there are good student outcomes. There is an organizational chart included in the plan that outlines a clear structure of the governing board, shows relationships with parents and staff, defined processes for selection and removal procedures, meeting schedule, power and duties, and a conflict of interest policy. The plan also includes the decision making processes the board will use to develop successful school policies. ● There is a board member orientation plan described that includes a timetable for training and development procedures with specific topics to be addressed, relative to applicable charter school laws and policies and successful school policies and expectations. ● There is a school’s grievance process for parents to express concerns and to resolve issues. The procedures are intended to allow parents who have issues to file a 	<ul style="list-style-type: none"> ●

Section 3 Governance and Capacity

	grievance, have a board review if not satisfied with a supervisor review and to get a satisfactory resolution.	
Reviewer #3	<ul style="list-style-type: none"> ● A majority of the BOD and 50% or greater of the BOD’s officers are NC residents (all Guilford/Rowan residents) ● One BOD member has prior school administration experience; one is an attorney; others round out with financial management/insurance/small business ownership experience ● Parents/staff will be given surveys 2x a year ● BOD recognizes that it will need to develop a conflict of interest & anti-nepotism policy, commit to Public Records & Open Meetings Law ● Staff and Parent grievance policies will be developed ● Appendix H contains resumes ● Proposed By-Laws, AOI ● Insurance quotes included at appropriate amounts 	<ul style="list-style-type: none"> ● 52-55
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● Have any of the Board members served on another Boards to understand their role in school governance or what training will be conducted prior to the school opening? ● What is the exact tie between the original Revolution Academy and RABH? 	<ul style="list-style-type: none"> ● 52 ● 54
Reviewer #2	<ul style="list-style-type: none"> ● The applicant states that this new charter school is designed as a sister school to another charter school, however, there is no indication of comparables for structure, implementation or replication of successful outcomes. ● It appears that the 5-7 members of the board have extensive knowledge and skills that can help govern a public charter school, however, the lack of academic experiences can prevent the ability to identify a successful school design, proper leadership and administration, effective curriculum, instruction and assessment. ● The plan lacks evidence that the CMO has concrete, specific experience with charter schools. There is no information that validates a strong governing board and a CMO with ground experience in successful openings and operations of charter schools. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● How is RABH a “sister school” to RA? What makes it distinct, innovative, as it is not a replication model ● What type of governance professional learning will the BOD receive (other than RTO process) and the “ongoing training” as part of the monthly BOD meetings prior to the school opening, and who will provide this training? What is the expectation with respect to BOD members who do not attend these trainings? 	<ul style="list-style-type: none"> ● 51

Section 3 Governance and Capacity

	<ul style="list-style-type: none">• BOD will need to meet, at a minimum, 8x a year and develop a strategic BOD calendar	
--	---	--

Section 3 Governance and Capacity

Section 3.4 Staffing Plans, Hiring, and Management		
Characteristics of a strong response: <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Have a well thought out support plan for staff (instructional coaches, tutors, etc.) 	<ul style="list-style-type: none"> • 61-62
Reviewer #2	<ul style="list-style-type: none"> • The applicant outlines specific strategies that are intended to attract and retain strong and highly qualified teachers. These recruitment and hiring strategies focuses on insuring that teachers have necessary resources and instructional materials; promoting teacher growth and success; providing an instructional coach and professional development training; participation in the decision-making process; and aiding in the recruitment process. There are procedures included in the plan for hiring satisfactory candidates to work in the schools and to terminate the unsatisfactory school personnel. The applicant describes competitive salaries and employment benefits, which includes a retirement account that aligns with other charter schools and the district schools. 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • Ongoing professional learning for teachers and instructional coach, tutors, curriculum provided, peer feedback and observation/coaching • Awareness that criminal background checks must be completed prior to any offer (conditional offer) • Healthcare & retirement account (will this be a 457B plan?) • Acknowledgment that they will not have AIG staff 	<ul style="list-style-type: none"> • 58
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> • Staff recruiting lack detail and may be due to their belief that CMO will be responsible • Finance officer salary seems low given necessary and important responsibilities • Conflicting EC student population #'s (10% vs. 12%)? 	<ul style="list-style-type: none"> • 57-58 • 59 • 44 & 60
Reviewer #2	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> •
Reviewer #3	<ul style="list-style-type: none"> • AP salary for Y1? Tutor salary seems inflated and finance Officer (Director of Operations) seems very low in order to attract a high quality individual. Perhaps much of these things will be managed by CMO? • Discrepancy is EC population (10 or 12%) • Hiring for EC teachers may require a different approach 	<ul style="list-style-type: none"> • 60-62

Section 3 Governance and Capacity

	<p>and timeline than for other positions; they are highly sought out, must be highly qualified and EC licensed, and are integral to having on staff when you receive your children on Day 1</p> <ul style="list-style-type: none">● Recommendation that the Principal be licensed as a school administrator with a degree in education or school administration, although that is not required of charters● Recognize that EC teachers must not only be HQ and licensed but licensed in EC● Recognize that 50% of your teachers must be licensed	
--	--	--

Section 3 Governance and Capacity

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	<ul style="list-style-type: none"> ● RABH has some strong professional development plans to ensure the staff have the foundational concepts that are consistent with the vision for the school. 	<ul style="list-style-type: none"> ● 64
Reviewer #2	<ul style="list-style-type: none"> ● There are clearly defined professional development opportunities that are offered to support the school staff that includes numerous instructional methodologies, best practices and strategies that can help maximize success in improving student achievement. The calendar schedule for the professional development occurs before school begins and ongoing throughout the school year. The selected staff development will be determined by a developed plan between the coach and teachers, after identifying strengths and weaknesses, which can help teachers grow and improve as an instructor. The plan to conduct peer observations periodically is intended to allow teachers to evaluate their curriculum delivery and instructional methods, make effective improvements, and learn from experienced educators. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Classroom walkthroughs will provide formative feedback to teachers to improve instruction ● Coaching and peer mentoring model ● Professional learning plan recognizes andragogy and best practices in PL (formal, individual, small group, observational) 	<ul style="list-style-type: none"> ● 63
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● The PD is extensive (8 days) in preparation for the start of school. Is there a plan for the additional staff to receive similar training as the school expands. 	<ul style="list-style-type: none"> ● 64
Reviewer #2	<ul style="list-style-type: none"> ● There is no budget line-item amounts recorded for the 	<ul style="list-style-type: none"> ●

Section 3 Governance and Capacity

	staff development.	
Reviewer #3	<ul style="list-style-type: none">● Discuss the ongoing professional learning throughout the course of the year● Onboarding plan for staff who are hired after initial professional learning days● Budget for PD/Professional Learning?● ½ day for Health & Safety may not be sufficient, particularly with staff training required on concussion (return to learn) requirements, etc.; same for PS, this might only skim surface, ongoing PS training will be required as this is the authoritative source in NC	<ul style="list-style-type: none">● 64-65

Section 3 Governance and Capacity

Section 3.6 Enrollment and Marketing		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● The recruitment plan seems comprehensive and the CMO will be putting resources towards providing materials. 	<ul style="list-style-type: none"> ● 65
Reviewer #2	<ul style="list-style-type: none"> ● There are numerous marketing strategies that the applicant uses to drive applications and enrollment. The plan includes advertisements, meetings, social media, printed materials and partnership with the sister charter school throughout the community. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● “Specific marketing plan that will help reach the goal of reflecting the racial/ethnic demographic of Guilford County.” ● Community organizations will be marketed to ● Social media ● RA cross-promotional opportunity ● Well thought out timeline and strategy 	<ul style="list-style-type: none"> ● 65
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● It is uncertain if the marketing strategies will generate the number of projected students for attendance. There are no specific plans mentioned to target the special population of students through their marketing strategies. ● There no budget line-item amounts recorded for the enrollment and marketing. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Budget for enrollment marketing ● Strategies for enrolling your targeted demographics? 	<ul style="list-style-type: none"> ●

Section 3 Governance and Capacity

Section 3.7 Parent and Community Involvement		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The applicant contends that family and community interest in the additional charter school is noted from the survey results. The marketing plan includes multiple outreach methods, such as, the use of demographic information, community organizations, churches, word of mouth, social media and information meetings. The designed marketing plan is intended to ensure prospective students and parents are informed about the opportunities and that the community is thoroughly educated about what the school offers. The recruitment methods are designed to reach a large portion of the targeted community through the use of a detailed enrollment benchmarks and participation in various community events. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Dedicated 'parent room', encouraged to volunteer, twice per year, parent input sought, parent advisory committees, formation of PTO 	●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● There is consistent reference to working in conjunction with Revolution Academy, including copying part of their application. The actual connections/relationship is unclear. 	● 67
Reviewer #2	<ul style="list-style-type: none"> ● It is not with certainty that the marketing plan will reach a wide variety of household incomes of specific families that includes a special population of students, such as low income, students with disabilities and ESL. ● There are no specific community resources and partnerships noted through documentation of pledged support included in the plan that are intended to benefit students and parents. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Again, this is not a duplication school, so what sets RA:BH apart? ● Will your marketing plan reach your target demographic? 	●

Section 3 Governance and Capacity

Section 3.8 Admissions Policy		
Characteristics of a strong response: <ul style="list-style-type: none"> Enrollment policy that complies with NC state law, SBE policy, and the Charter Agreement. 		
Initial Application Review		
Strengths		Page
Reviewer #1	<ul style="list-style-type: none"> Most of the policy was clear, including multiple birth siblings 	<ul style="list-style-type: none"> 68
Reviewer #2	<ul style="list-style-type: none"> The applicant details the admission policy with specifics regarding policies and procedures for admitting students to the proposed charter school. The explanations of policies and procedures includes focus on enrollment periods, the lottery plan, wait list, withdrawals, transfers, which are included in the Charter Agreement. 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> Open enrollment period, may wish to have shortened acceptance window for purposes of your ADM and break even 	<ul style="list-style-type: none">
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> Giving families 30 days to accept a spot may be difficult for the school to know what their ADM count/budget will be. 	<ul style="list-style-type: none"> 68
Reviewer #2	<ul style="list-style-type: none"> It is uncertain if the enrollment policy complies with NC State law and the SBE policy. 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> You cannot have a sibling preference in Year One of a school; You will need to not only list your enrollment preferences, but rank them, and include the language of (not to exceed 15% of the total school population) for BOD and full time staff members; Policy would benefit from being taken, <i>verbatim</i>, from general statute and SBE policy that addresses admissions and then, weighted lottery(115C-218.45(g1) and Policy CHTR-014; You will want to make clear that you will accept no applications, nor admit any student, who is not an NC resident/domiciliary (save military exceptions) Weighted lottery section is insufficiently detailed. Pursuant to statute and SBE policy, must align with the mission of the school and you will wish to use economically disadvantaged throughout (as opposed to educationally disadvantaged) You will want to flesh out the plan for running a weighted lottery (either weighting a student's individual chances in the general lottery or conducting the weighted lottery prior to the general lottery) 	<ul style="list-style-type: none"> 68-70

Section 3 Governance and Capacity

	<ul style="list-style-type: none">• You will want to assess eligibility for a weighted lottery using an optional form which states that the family gives consent for the school/CMO to verify economic or educational disadvantage; verification should not take place until the student has been enrolled through selection in the weighted lottery	
--	--	--

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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The lottery process used by the applicant is intended to serve a population of students who mirrors the targeted area and to achieve a balance from a variety of different backgrounds. The weighted lottery process is defined and dictates the requirements that support the procedures the applicant is requesting. There are thorough processes and procedures used through the weighted lottery process that ensures barriers are removed, and that the school reaches a balanced target population of students. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Please reach out to OCS for guidance on a weighted lottery 	●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● Which preference (sibling vs. economically disadvantaged students) will take precedence ● 	● 68
Reviewer #2	<ul style="list-style-type: none"> ● 	●
Reviewer #3	<ul style="list-style-type: none"> ● A weighted lottery is not an enrollment priority ● Policy would benefit from being taken, <i>verbatim</i>, from general statute and SBE policy that addresses admissions and then, weighted lottery(115C-218.45(g1) and Policy CHTR-014 ● Consider clarifying that you will accept no applications, nor admit any student, who is not an NC domiciliary (save military exceptions); ● Weighted lottery section is insufficiently detailed; Pursuant to statute and SBE policy, must align with the mission of the school and you will wish to use economically disadvantaged throughout (as opposed to educationally disadvantaged); ● Consider clarifying the plan for running a weighted lottery (either weighting a student’s individual chances in the general lottery or conducting the weighted lottery prior to the general lottery); 	● 68-70

	<ul style="list-style-type: none">● Consider assessing eligibility for a weighted lottery using an optional form which states that the family gives consent for the school/CMO to verify economic or educational disadvantage; verification should not take place until the student has been enrolled through selection in the weighted lottery	
--	---	--

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
<p>Reviewer #1 Strengths/Concerns/Comments Summary</p> <p>While there are some strengths in the application (parental involvement plan, teacher professional development, lottery policy), there seems to be some areas that need some additional thought given. Most specifically, the school seemingly is putting a lot of faith in a relationship with another area charter, that although is approved, does not open until next fall is unproven in their methodology. The exact nature of their relationship is unclear and it would be beneficial to understand prior to approval consideration.</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary</p> <p>There is a wide range of procedures and processes demonstrated in the proposal that ensures meaningful structures for the charter school and successful results are expected. The main concerns in this section focus on the marketing strategies to ensure the projected student enrollment, which dictates the successful implementation of the charter school.</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>Lottery, and in particular, weighted lottery section, needs clarity and reworking. RA:BH is not a duplication school and RA has not been tested as it hasn't opened yet. CMO has no track record in terms of financial management, history. Curriculum v. standards; while the curriculum is how we get there, I am not sure that the mapping of curriculum to support the mastery of the standards which is what the students will have learned at the end of the day (and accountability) is as clear as it could be. Nature of relationship between RA and RA: BH and CMO Executive Directors's roles/responsibilities would be helpful. Will marketing ensure you meet your targeted demographic?</p>

Section 4 Operations

Section 4.1 Transportation Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Good consideration given to the amount of need that will exist given the potential needs of the student body (up to 40% EDS) 	<ul style="list-style-type: none"> ● 70-71
Reviewer #2	<ul style="list-style-type: none"> ● The applicant explains a transportation plan to ensure that a variety of students are able to participate in the charter school opportunities. The transportation plan supports contracting a local service provider, having designated bus stops throughout the community, ensure available funding through additional resources, giving preference to economically disadvantaged students, lowering cost in cases to comply with all IEPs and monitoring student transportation needs on a daily basis. It appears that the applicant is familiar with state and federal regulations relating to provisions of transportation services. The plan includes different ways to access and arrange transportation through clearly defined procedures. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Plan to contract for 2 buses, recognizing that up to 50% of initial student population may be in need; ● Note that EC IEP may require transportation as a related service and reflection of this in budget as well as plan to lower management fee if contingency arises 	<ul style="list-style-type: none"> ● 71
Reviewer #4	<ul style="list-style-type: none"> ● good description of the need to support students with IEPs that require transportation. 	<ul style="list-style-type: none"> ● p. 71
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● It is very possible that there is a greater need than planned for. EDS qualified students will get first priority, but then how will students be chosen given the limited numbers. 	<ul style="list-style-type: none"> ● 71
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● COntingency plan if two buses insufficient 	<ul style="list-style-type: none"> ●
Reviewer #4	<ul style="list-style-type: none"> ● none 	<ul style="list-style-type: none"> ● n/a

Section 4 Operations

Section 4.2 School Lunch Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Significant funding has been allocated to provide lunches for students in need. 	<ul style="list-style-type: none"> ● 72
Reviewer #2	<ul style="list-style-type: none"> ● There is a budget line-item amount for child nutrition for the five year grant period that can ensure that food service is offered to all students who qualify. The lunch plan defines clear approaches to make sure lunch is available through packed lunches or ones purchased from the lunch vendor. The applicant intends to use a percentage of the sale of the vender lunches to offset the cost of the free and reduced lunches. The lunch plan can ensure compliance with the applicable state and federal regulations. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Budget reflects amount allocated to lunches ● Percentage of vendor sales will defray cost of F&R lunches 	<ul style="list-style-type: none"> ●
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● There is not much detail as it revolves around the specific vendor and plan for providing lunches. It appears that the plan is to charge approx. \$2.50/meal; have they found a vendor that can provide balanced meals for that price if not participating in the National School Lunch Program? 	<ul style="list-style-type: none"> ● 72
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Lack of details in terms of how you will “qualify” students (TANF, SNAP, WIC, FDPIR), or those who may automatically qualify such as Head Start, homeless, foster care or migrant, who will do this (where will the application be made available (optional)), which vendors will be used, how you will vet meals for nutritional value, how will students who are free or reduced “access” their lunches in a way that doesn’t identify them as F&R 	<ul style="list-style-type: none"> ● 71-72

Section 4 Operations

Section 4.3 Civil Liability and Insurance		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● Appropriate coverage 	<ul style="list-style-type: none"> ● 72
Reviewer #2	<ul style="list-style-type: none"> ● There is a budget line-item amount for insurance coverage which can ensure adequate coverage is provided. The applicant details the amounts for each type of coverage based on quotes, which are required, from insurance providers and the projected cost. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Appropriate coverage: Minimum \$1 million fo E&O, gen'l liability, auto liability and insurance quote attached in Appendix L/ WC 	<ul style="list-style-type: none"> ● 72
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● No significant concerns noted ● 	<ul style="list-style-type: none"> ●
Reviewer #2	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● No concerns noted 	<ul style="list-style-type: none"> ●

Section 4 Operations

Section 4.4b Start-Up Plan		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The CDS staff consists of the team who are designated for ensuring a successful school opening. The applicant states that the CDS staff has the experience and commitment to lead the start-up process and a plan is included that outlines the task, timeframe and the responsible parties. The potential challenges are addressed in the plan and intends to be resolved within the projected timelines. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Health & Safety regs (115C-218.75); written safety plan; ● start-up funding allows for Principal to be compensated for a portion of the year ● Marketing budget is 20K but speaks to “benefits from publicity surrounding the 2020 opening of that school and the familiarity of the community from the RA marketing.” 	● 73-76
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● Will the principal have enough time to both prepare for the school year ahead (hiring, curriculum development, handbook development, facility prep, etc.) and be available to represent the school for promotion/lottery 	● 73
Reviewer #2	<ul style="list-style-type: none"> ● The applicant provides no information that validates the CDS team can successfully address the challenges of leading the planning and start-up of the new charter school. The team is new to the charter school process which can hinder the post-approval to opening process and adequately manage a star-up budget and able to address any challenges that arise. 	●
Reviewer #3	<ul style="list-style-type: none"> ● No mention of grant being sought, NC ACCESS grant (?) or other avenues of financial support that they might pursue ● insufficient details on contingency plan if not able to secure ECO, although they do state that they will not need any unusual or specialized facilities 	● 76

Section 4 Operations

Section 4.5 Facility		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The applicant explains the process for acquiring a facility that includes conversations with two facilities that currently have an ECO. It seems that there are other location possibilities and several permanent sites have been located and the search for the best site will continue within the projected timeline. The applicant details reasonable requirements for an adequate facility that can ensure code compliance and meet any unusual or specialized work spaces. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Experience of BOD member with facilities, start-up, management & construction; two identified that have ECOs already 	● 76
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● RABH seems to be relying heavily on the partnerships with the CMO for both start-up funds for budget shortfalls and/or staffing for man of the planning year tasks. Since Charter Development Solutions is new, will they be able to support the number of needs? 	● 74
Reviewer #2	<ul style="list-style-type: none"> ● The uncertainty of not having obtained a facility and not knowing if the 2020 opening date will happen is a concern. 	●
Reviewer #3	<ul style="list-style-type: none"> ● CDS (CMO) which is unproven, untested, will be, in theory, operating two charters(one as Principal of RA and one as Exec. Director of CMO supporting RA:BH), opening a year apart? ● RA due to open in 2020? 	● 74

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
<p>Strengths:</p> <p>Reviewer #1: There has been clear consideration and planning around making sure that there are the necessary resources to help support the predicted demographics of the school.</p> <p>Reviewer #2: The plan includes a plan for identifying the needs in acquiring, financing, renovating and ensuring code compliance for a facility. The applicant seems to have alternate plan in place to have a temporary facility to house the proposed charter school.</p> <p>Reviewer #3: Classical/Core Knowledge; economically disadvantaged population/demographics and attempts in planning to mirror demographic of community they serve.</p>
<p>Concerns/Questions:</p> <p>Reviewer #1: While there are some slight concerns, over all the expectation/strength of the CMO is important to understand given the critical nature the success of the plan is dependent upon that relationship. Additionally, the cost per square foot for the construction of a permanent facility is not in-line with going market rate in the area.</p> <p>Reviewer #2: It is uncertain if a permanent facility will exist within the specific timelines.</p> <p>Reviewer #3 Untested CMO, in theory managing two (2) new charter schools which are not replication models and appear not to be distinguishable, one from the other. Heavily reliant for success on a strong CMO partnership, start up funding; lunch and transportation plan need further fleshing out, particularly the lunch plan. Permanent facility concern. Break even number is quite tight.</p>

Section 5 Financial Plan

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	●	●
Reviewer #2	<ul style="list-style-type: none"> ● The applicant has identified the LEA that generates the funding for the charter school program and there is no commitment of any additional sources of revenue. ● The plan outlines how the enrollment projection aligns with the funding, based on the needs for a similar program in the targeted area, families indicated a desire to have access to options and analysis of demographic data from the target area surveys. ● The operating budget contains five years of realistic projections that reflects all areas, such as, personnel, facilities, insurance, build-out cost, free or reduced lunch cost, etc. Most of the budget details appear reasonable for the projected assumptions and the assessment of projected source of revenue and expenses seem viable for the operational cost. The projections of most of the line-items are aligned with the proposed sections of the application. ● 	●
Reviewer #3	<ul style="list-style-type: none"> ● Budget includes 2 EC teachers ● Applicant has identified 2 or more LEAs ● General fund balance of 60 days of expenses in first 5 years ● Budget ensures all students have access to lunch & transportation 	●
Reviewer #4	●	●
Concerns/Questions		Page

Section 5 Financial Plan

Reviewer #1	<ul style="list-style-type: none"> ● The listed “break even” point for student enrollment is 301 students. This is deeply concerning as the projected full enrollment is 309 students. If there is even a 10% reduction in the projected demand, that would be 278 students, which would leave the school with significant deficit. 	<ul style="list-style-type: none"> ● 78
Reviewer #2	<ul style="list-style-type: none"> ● There are some budget line-items that have amounts requested which are necessary for the charter school implementation and operations. ● The applicant references funding to off-set the expenses, however, the plan did not include signed documents to validate committed funding. There is no evidence in the plan relative to a contingency plan in place for funding to make sure the needs of all students are met. 	<ul style="list-style-type: none"> ●
Reviewer #3	<ul style="list-style-type: none"> ● Break even number of 301 is of concern if 309 is enrollment goal, which is also a high enrollment projection ● Where is the committed funding; ● Why are tutors and core content teachers making almost identical salaries in Y3? Salary for teachers goes up 1k per year, but Tutor positions jumps all the way up to 47K in Y3. Planning for a counselor or EL teacher? Contracting to meet needs of EL students? ● Budget does not rely on any outside funds, in-kind donations of goods or services ● If anticipated EC numbers are higher than anticipated, adjustments may include delaying discretionary technology purchases and reducing the CMO management fee, but that is not reflected in the actual CMA ● CMA agreement does not indicate that CMO management fee will be the first reduction, prior to staffing numbers and other expenditures? Article VI, Financial Arrangements, C. Management Fees states “CDS shall receive. . . a management fee equal to: (i) 10% of the School’s annual revenue; and (ii)50% of the School’s Annual Surplus in excess of \$50,000.00. Notwithstanding the foregoing, CDS will not be required to reduce its Management Fee below the actual costs & expenses for services provided to the School, including but not limited to the Services set forth in Article IV, under this Agreement.” 	<ul style="list-style-type: none"> ● 78-79
Reviewer #4	<ul style="list-style-type: none"> ● 	<ul style="list-style-type: none"> ●

Section 5 Financial Plan

Section 5.2 Budget Narrative		
Characteristics of a strong response: <ul style="list-style-type: none"> ● 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	<ul style="list-style-type: none"> ● No significant strengths noted 	●
Reviewer #2	<ul style="list-style-type: none"> ● The applicant presents multiple contingencies that include reducing staff, adjusting expenditures, managing enrollment and eliminating several roles, which will be implemented if revenues are not what is anticipated. There are several examples included in the plan that validates the collective qualifications of individuals who are able to successfully implement the financial plan successfully. The applicant contends that the board members are qualified and capable of providing the proper oversight of the budget and operations of the school. 	●
Reviewer #3	<ul style="list-style-type: none"> ● Several BOD members have experience with budgets, one has experience with school budgeting, one is a CPA with audit experience and several have financial knowledge that will support financial health ● Acadia Northstar will provide financial management services ● BOD will receive ongoing training in charter school finances and will receive monthly financial reports 	● 79
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> ● The solution for not meeting full budget numbers is not only a reduction in staff/resources, but also to have the CMO take less profit. Has that been documented and/or do they have the wear with all to be able to take that reduction, if necessary? Who will determine if the reduction is taken by the CMO vs. staffing/resources? ● What % of annual budget does the Board have discretion over? 	<ul style="list-style-type: none"> ● 79 ● 80
Reviewer #2	<ul style="list-style-type: none"> ● There is concern that the qualifications of the board members that consist of a variety of business and legal experiences, may not translate in successful operations and ensure the financial health of the school. 	●
Reviewer #3	<ul style="list-style-type: none"> ● RA:BH does not have any other assets from any other 	● 81

Section 5 Financial Plan

	<p>sources</p> <ul style="list-style-type: none">● Contingency plan begins with “The CMO will start by reducing its fee. . .”, yet that is not reflected in the CMA contract, that I was able to find	
--	---	--

Section 5 Financial Plan

Section 5.3 Financial Compliance		
Characteristics of a strong response: <ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Working with an established charter school accounting firm. 	<ul style="list-style-type: none"> 81
Reviewer #2	<ul style="list-style-type: none"> The applicant will employ an outside vendor to provide financial management services that provides the services needed for financial compliance. The ongoing financial reports and ongoing training will ensure the responsible management of the school's finances. 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> Acadia North Star has a solid reputation and significant experience with NC charters Auditor/firm has been included Strong policies in place to outline clear expectations of financial procedures 	<ul style="list-style-type: none"> 81
Concerns/Questions		Page
Reviewer #1	<ul style="list-style-type: none"> No significant strengths noted 	<ul style="list-style-type: none">
Reviewer #2	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Reviewer #3	<ul style="list-style-type: none"> No concerns noted on accounting/payroll front 	<ul style="list-style-type: none">

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
<p>Reviewer #1 Strengths/Concerns/Comments Summary</p> <p>Again, there is a large reliance on the relationship with the CMO, which does not have a track record with other school support. The solution for not meeting full budget numbers is not only a reduction in staff/resources, but also to have the CMO take less profit. Has that been documented and/or do they have the wear with all to be able to take that reduction, if necessary? Who will determine if the reduction is taken by the CMO vs. staffing/resources</p>
<p>Reviewer #2 Strengths/Concerns/Comments Summary</p> <p>There are adequate financial processes and procedures in place to ensure responsible fiscal management of the school’s resources.</p>
<p>Reviewer #3 Strengths/Concerns/Comments Summary</p> <p>The CMA with CDS is concerning given the lack of a track record with this CMO, as is the lack of any contractual language which would require CMO to take a reduction in fees, at least that this reviewer could find in the CMA. Such a heavy reliance on an EMO/CMO should be taken note of, as the fact that Exec Director is also Principal of RA. CMA also does not contain the language that the CMA would disclose to the BOD of RA: BH any conflicts of interest, relationship, personal, business, or otherwise to BOD.</p>