

[Pick the date]

Criteria	Insufficient	Emerging	Quality	Evaluation Notes
Student Enrollment				<p><input type="checkbox"/> Enrollment is greater than 75% of the projected year one total.</p> <p>Consultant: Please provide date and enrollment number and projected year one ADM and calculate percentage. Needs to be at 75% or above. Please provide a table detailing each grade level served, the number of students enrolled in each grade level, and the number of students on the waiting list, per grade level:</p> <p>Consultant notes:</p>
Required Documentation				<p><input type="checkbox"/> Charter Agreement with signature page. This will be completed in July, after the SBE has voted on the final approval of RTO and the Superintendent has signed the charter agreement. The original signature page has been returned to OCS.</p> <p><input type="checkbox"/> Certificate of Liability Insurance meets all requirements as outlined in Section 13 of the Charter Agreement and G.S. 115C-218.20. <i>Please do not submit a quote, binder, or letter from an insurance carrier. The actual certificate is what is required.</i></p> <p><i>(Consultants check one).</i></p> <p><input type="checkbox"/> The liability is missing lines of coverage, specifically: _____</p> <p><input type="checkbox"/> The liability insurance has no coverage dates.</p> <p><input type="checkbox"/> The liability line for _____ must be 'per occurrence', not 'aggregate'.</p>

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				<input type="checkbox"/> The NC SBE is not a named, additional insured. Consultant's notes:
Board Governance				<input type="checkbox"/> Board Meeting Minutes from December 2022 to May 2023, evidencing understanding of key laws and use of best practices. <input type="checkbox"/> Open Meetings Law <input type="checkbox"/> Governance Strengthening Exercises: October Bundle & Strategic Goals & Accountability. Completion of one governance strengthening exercises. Keep in mind that some exercises have multiple products . <input type="checkbox"/> Criminal background checks have been provided for new board members. (Note- if new board members are added a new background check must be completed and updated in Epicenter). <input type="checkbox"/> Current board member list and contact information is provided to OCS. This Board List is due in December & May . Consultants' notes:
School Facility				<input type="checkbox"/> The school facility is obtained, safe and suitable to receive students according to local inspection office as demonstrated by a Certificate of Occupancy for Educational Purposes being on file in the Office of Charter Schools. <input type="checkbox"/> Facility has been obtained and lease meets statute . Please make sure that it contains the required 'no indebtedness language' from <i>Section 19 of the Charter Agreement and 115C-218.105(b)</i> . The required language is, <i>"No indebtedness</i>

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				<p><i>of any kind incurred or created by the charter school shall constitute an indebtedness of the State or its political subdivisions, and no indebtedness of the charter school shall involve or be secured by the faith, credit, or taxing power of the State or its political subdivisions.”</i></p> <p><input type="checkbox"/> Renovation or construction is on track (Provide a copy of the renovation/construction schedule, if applicable.) Completed, or on target for completion, at a minimum two weeks before proposed day one of school.</p> <p><input type="checkbox"/> Contingency plan must be provided. In place and ready to be executed in case building is not ready to occupy by the first day of school for ANY REASON. <i>Regardless of the status of the facility, ALL schools are required to provide a valid contingency plan. Contingency location must also possess or be eligible for receiving a certificate of occupancy for educational use.</i></p> <p><input type="checkbox"/> Ensure ALL local inspections have been completed (fire, health, vendor etc.). Evidence has been provided that the requirement has been met. <i>If the Certificate of Occupancy is not issued in the same year that the school opens, then the board must also provide a copy of the current year's fire inspection.</i></p> <p>Consultant's notes:</p>
Funding Documentation				<p><input type="checkbox"/> Establish accounting services - e.g., LINQ or other vendor/provider. Evidence may be an email confirming registration.</p> <p><input type="checkbox"/> Establish a bank account. Evidence has been provided, which can be a letter from the bank.</p>

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				<p><input type="checkbox"/> Apply for a Unique Entity Identifier (UEI), which replaces the older DUNS Number and register on System for Award Management (SAM). Evidence has been provided of either DUNS application or UEI application.</p> <p><input type="checkbox"/> Develop and approve a regular budget for the 2022-2023 school year (based on student enrollment numbers).</p> <p><input type="checkbox"/> EDDIE must be updated and complete. EDDIE must have the name of the BOD Chair and email address; Vice Chair name and email address; Charter School Director name and email address.</p> <p><input type="checkbox"/> Develop and approve a break-even budget for the 2022-23 school year (based on the minimum number of students the school can enroll and remain financially viable). <i>Please provide a full break-even budget for year one that includes all revenue, all expenses, and the total budget surplus or deficit.</i></p> <p><input type="checkbox"/> Process initiated for obtaining Federal Tax-Exempt Status pursuant to G.S. 115C-218.15(b). Federal tax-exempt status must be obtained no later than 24 months from the date the SBE gives final approval of the application. It does not run from the date that the school obtains a recommendation to open, it runs from the date your charter application was approved and you were approved to enter the RTO process.</p> <p><input type="checkbox"/> Formally vote to join or opt out of the State Health Plan (See RTO Framework for additional information if school chooses to opt-in.) Board meeting minutes must reflect a vote on this.</p>
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				<p><input type="checkbox"/> Formally vote to join or opt out of the State Retirement System. Board meeting minutes must reflect a vote on this. If the board elects to join the State Retirement System, set aside \$50,000 in case of dissolution. Use one of the 4 options in G.S. 115C-218.100(a). Board meeting minutes must reflect a vote on this.</p> <p><input type="checkbox"/> Identify LGC-approved CPA firm to perform annual audit. Audit Resources from the NC Treasurer's Website.</p> <p><input type="checkbox"/> Submit a chart showing how many students are from each LEA to be prepared for the CSADM submission.</p> <p>Consultant's notes:</p>
Student Accountability				<p><input type="checkbox"/> School has an approved policy and proposed location regarding the mandatory locking up of ALL testing materials Please reference The Test Coordinators Policies & Procedures Handbook.</p> <p><input type="checkbox"/> A document template (chart, spreadsheet, etc.) has been created to record the school's requests for student records from each sending LEA.</p> <p><input type="checkbox"/> Communication portals are operational to receive important communications from LEAs and DPI divisions. Provide the fax number and other means of communicating to and from the school (could be a Google phone and school email), and confirm how you will receive records requests from other PSUs.</p> <p><u>Consultant's notes:</u></p>

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Key Staff				<p><input type="checkbox"/> The school leader and at least 75% of staff members have been identified for hire. The school is on track to meet the minimum requirement of 50% of its teachers being fully licensed by December 31st. Please provide a letter of assurance signed by the Chair of the BOD and school leader and list of positions, hiring status, and licensure status for each hire or proposed hire.</p> <p><input type="checkbox"/> A strategic plan is submitted for hiring any remaining staff before the start of the school year. Please provide the strategic plan.</p> <p><input type="checkbox"/> A Professional Development Calendar has been outlined for the full school year for all staff (regional meetings/training, site-based training, etc.). Please see an exemplar linked here: PD calendar for all staff. List the month, audience, and topic starting in September 2022 and continuing through June 2023</p> <p><input type="checkbox"/> Beginning Teacher Support Program Plan has been approved by the Regional Education Facilitator. A sample BTSP Plan</p> <p><input type="checkbox"/> Hiring and Licensure Plan is drafted and submitted to Regional Assisting Licensing Centers (RALC) for feedback. Check the New Charter Leaders' Tasks List if you don't know who your RALC is. This plan should detail how the school will hire staff, responsibilities for the hiring process, carry out background checks, review the SBE revoked license list, as well as ensure that 50% of teaching staff are licensed in compliance with state law. Please also note how Exceptional Children's staff will be confirmed as licensed in EC.</p> <p>Consultant's notes:</p>
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Transportation Plan				<p><input type="checkbox"/> The board has a transportation plan and a means to communicate the plan to all stakeholders. Evidence has been provided that the requirement has been met. What is your transportation plan to lower barriers to attending your school? Evidence may include surveys, marketing, and other communications to families. Please verify that families are never being charged a fee by the school or a private vendor for transportation.</p> <p><input type="checkbox"/> Reach out to local authorities regarding traffic support (i.e., installation of a turning lane to facilitate traffic flow in and out of the school, etc.). Provide evidence of communication with local authorities.</p> <p><input type="checkbox"/> If purchasing buses, the school should proceed with securing the buses and getting them inspected in a timely manner to ensure any deficiencies can be fixed prior to the opening of school. Evidence of purchase and inspection should be provided to the Office of Charter Schools.</p> <p>Please note: NC ACCESS schools had enhanced criteria to meet for Transportation Plan.</p> <p>Consultant's notes:</p>
Lunch Program				<p><input type="checkbox"/> School policies for lunch service have been adopted and are <u>aligned with the SBE-approved plan. Please describe how your lunch plan will not identify or disparately treat students who qualify as EDS. School Lunch Policies & Procedures: a. If participating in the National School Lunch Program, contact the regional consultant (email and phone number) and ensure all steps are followed with fidelity (begin in January 2022). b. If not participating in the National School Lunch Program, ensure there is a plan in place for students who may</u></p>

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				<p><u>not be able to afford a lunch. c. Ensure any contracted vendors meet local codes (Local Health Department). Link to the NC DPI Division of Child Nutrition.</u></p> <p><input type="checkbox"/> Please submit evidence of a contract with a vendor if participating.</p> <p><input type="checkbox"/> If contracting with a vendor, please provide the name of each restaurant that will be used through this vendor and a picture of the sanitation grade for each restaurant.</p> <p>Please note: NC ACCESS schools will have enhanced criteria to meet for the Lunch Plan as well as the contract.</p> <p>Consultant's notes:</p>
Policy Manual				<p><input type="checkbox"/> Staff Evaluation policy has been submitted and is complete, with date of BOD adoption.</p> <p><input type="checkbox"/> Student Records policy has been submitted and is complete, with date of BOD adoption.</p> <p><input type="checkbox"/> Family & School Communication policy has been submitted and is complete, with date of BOD adoption.</p> <p><input type="checkbox"/> Campus Visitors policy has been submitted and is complete, with date of BOD adoption.</p> <p>Grading Scales policy has been submitted and is complete, with date of BOD adoption.</p> <p><input type="checkbox"/> Student Promotion & Retention policy has been submitted and is complete, with date of BOD adoption.</p> <p><input type="checkbox"/> Report Cards policy has been submitted and is complete, with date of BOD adoption.</p>

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				<input type="checkbox"/> Create a plan (MTSS) describing how the school will provide support structures for struggling students who are not in the Exceptional Children's Program. Consultant's notes:
Student- Parent Handbook				<input type="checkbox"/> Handbook is in final form and has been approved by the BOD . Please submit the Student/Parent Handbook (including student behavior policies). The Handbook should also include procedures for short-term suspension, long-term suspension, and expulsion that align with Article 27 of the Public School Laws. Evidence of board approval should be demonstrated in the meeting minutes. <input type="checkbox"/> Handbook is missing one or more recommended elements: Consultants- Select elements included- At a minimum this should include: <input type="checkbox"/> (a) School Calendar <input type="checkbox"/> (b) Structure/Length of School Day <input type="checkbox"/> (c) Grading Scales <input type="checkbox"/> (d) Report Cards <input type="checkbox"/> (e) Student Promotion <input type="checkbox"/> (f) Student Retention <input type="checkbox"/> (g) Discipline Policy <input type="checkbox"/> (h) Student Code of Conduct As well as Operations Procedures: <input type="checkbox"/> (a) Student Records; <input type="checkbox"/> (b) Family and School Communication. <input type="checkbox"/> (c) Campus Visitors Campus Visitors Consultant's notes:

June Progress Check

School's Opening Day: _____

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A score of **Quality** consists of evidences that reflect a thorough understanding of effective school instructional, governance, operational, and financial planning to produce a viable and quality public charter school. The evidences address each area with specific and detailed information that demonstrates the board's and school leadership's diligence and preparation.

- All required evidences are completed and submitted on time.
- School policy manuals and handbooks are formally adopted and align with ALL sections of the SBE approved charter application.
- The school will be ready to open two weeks prior to the opening day of its projected calendar.

A score of **Emerging** consists of evidences of each criteria being addressed; however, the evidences lack meaningful detail and still require important additional information prior to the public charter school's opening.

- Most required evidences are completed and submitted on time.
- School policy manuals are close to completion and align with ALL sections of the SBE approved charter application.
- The school is projected to meet the opening day of its projected calendar.

A score of **Insufficient** consists of the evidences lacking meaningful detail, demonstrating lack of preparation, including unanticipated obstacles, or otherwise raising substantial concerns about the applicant's understanding of the school governance, operational, and financial planning.