



NC ACCESS Subgrant Program Application Recommendation
TeamCFA: Bonnie Cone Classical Academy
May 6, 2019

Introduction

In 2018, the North Carolina Department of Public Instruction (NCDPI) was awarded a Public Charter Schools Program (CSP) grant from the U.S. Department of Education (USDOE) of approximately \$26,600,000. The CSP grant will be used to implement the North Carolina Advancing Charter Collaboration and Excellence for Student Success (NC ACCESS) Program¹ to:

1. Increase the number of educationally disadvantaged students attending high-quality charter schools and expand the number of high-quality charter schools available to educationally disadvantaged students;
2. Develop a cohort of one hundred (100) charter school leaders who can develop and demonstrate best practices in serving educationally disadvantaged students; and
3. Broadly disseminate best practices in serving educationally disadvantaged students and foster collaboration in the charter school community and between charter schools and traditional public schools.

The NC ACCESS Program has allocated the majority of the CSP funds to advance Priority 1 listed above through school-level subgrants, though subgrant recipients must also demonstrate a desire to share best practices with both charter schools and traditional public schools. For each of the five (5) years of the federal CSP award, the NC ACCESS Program will run a competitive subgrant competition and award subgrants to North Carolina charter schools that propose a comprehensive plan to increase the number of educationally disadvantaged students attending high-quality charter schools and expand the number of high-quality charter schools available to educationally disadvantaged students.

This recommendation report includes the following information:

1. Procedural History: A review of the procedural steps taken by the applicant and NC ACCESS Program team to ensure a consistent application and evaluation process. (p. 3)
2. Conclusion and Recommendation: The NC ACCESS Program recommendation to approve or deny the subgrant application. (p. 3)
3. Summary of the Application: A brief description of the applicant's proposed plan to serve an increased number of educationally disadvantaged students attending high-quality charter schools and expand the number of high-quality charter schools available to educationally disadvantaged students. (p. 4)
4. Summary of the Evaluation: A summary of the evaluation of the subgrant application by the Review Committee, including section ratings and application strengths and areas of concern. (p. 5-6)
5. Exhibits: Additional documentation pertinent to the recommendation. (p.7)

¹ <http://www.ncpublicschools.org/charterschools/ncaccess/>

Overview of the Evaluation Process

The NC ACCESS Subgrant Program is a competitive application process designed to award funding for North Carolina charter schools that propose to serve an increased number of educationally disadvantaged students. Each subgrant application has been reviewed by a committee of NC ACCESS Program team members and trained external evaluators. Applications were evaluated using the approved NC ACCESS Program subgrant application scoring rubric.²

The subgrant application for TeamCFA: Bonnie Cone Classical Academy was evaluated by a Review Committee consisting of the following individuals:

Evaluator	Role
Meredith Flowe	External Evaluator
Dr. Elaina Sabatine	External Evaluator
Dr. Barbara O’Neal	Program Coordinator, NC ACCESS Program
Jay Whalen	Program Administrator, NC ACCESS Program

The recommendation made to the Charter School Advisory Board (CSAB) is based on the totality of evidence provided by the applicant and all evaluations by the Review Committee. The CSAB will take all recommendations, evaluations, application materials, and due diligence into account and make a recommendation for the approval of subgrants to the State Board of Education (State Board). The State Board will determine the final approval of all subgrant awards.

A subgrant application that merits a recommendation for approval should present a clear, realistic picture of how the charter school expects to successfully implement the proposed plans to increase the number of educationally disadvantaged students attending high-quality charter schools and expand the number of high-quality charter schools available to educationally disadvantaged students. In addition to meeting the criteria in each section, each part of the proposal should align with the overall mission, budget, and goals of the application and NC ACCESS Program.

Recommendations for approval or denial are based on the completed application which includes school information, signed assurances, enrollment projections, application narrative, budget, budget narrative, logic model, and appendices. The enrollment projections, application narrative, budget, budget narrative, and logic model are scored out of a possible one hundred (100) points. Applicants must score at least eighty (80) points to meet the standard and to be considered for a recommendation for approval. Applications that do not meet standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

² <http://www.ncpublicschools.org/docs/charterschools/ncaccess/scoring-rubric.pdf>

Procedural History

The following outlines the steps completed by TeamCFA: Bonnie Cone Classical Academy (Applicant), the NC ACCESS Program team, and the Review Committee to ensure an objective, transparent, and comprehensive application evaluation process:

1. The Applicant submitted a Letter of Intent (LOI) to the NC ACCESS Program on February 15, 2019 indicating interest in applying to the NC ACCESS Subgrant Program.
2. The LOI was reviewed and the Applicant was designated as ‘Eligible’ to complete a full subgrant application. The Applicant was notified of their eligibility status via email on February 18, 2019.³
3. The CSAB was notified of the Applicant’s eligibility status via emailed report on February 25, 2019.
4. The Applicant submitted a full subgrant application in Epicenter on March 31, 2019.⁴
5. The NC ACCESS Program Review Committee evaluated the full subgrant application using the approved NC ACCESS Program subgrant application scoring rubric.⁵
6. A final recommendation was drafted based on the completed evaluations by Review Committee members.

Conclusion and Recommendation

TeamCFA: Bonnie Cone Classical Academy submitted an application for a Planning and Implementation subgrant for implementation beginning in the 2019-2020 school year. The application and evaluation summaries for the subgrant application submitted by Team CFA: Bonnie Cone Classical Academy begin on page four (4) of this document. Based on the procedural history and the comprehensive evaluation of the Review Committee using the approved NC ACCESS Program subgrant application scoring rubric, the NC ACCESS Program team recommends Team CFA: Bonnie Cone Classical Academy be awarded a Planning and Implementation subgrant for the 2019 application cycle.

Subgrant Application for TeamCFA: Bonnie Cone Classical Academy	RECOMMENDED FOR APPROVAL
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 Dave Machado, Director
 Office of Charter Schools

5/1/2019

 Date

³ See Exhibit A.
⁴ See Exhibit B.
⁵ See Exhibit C.

Summary of the Application

School Name: TeamCFA: Bonnie Cone Classical Academy

Location of School: Mecklenburg County

CMO/EMO: TeamCFA

Projected Enrollment:⁶

Subgrant Year	Grade Levels Served	Total Student Enrollment	Total ED Student Enrollment	ED Enrollment Percentage
2019-2020	K-6	450	45	10%
2020-2021	K-7	600	120	20%
2021-2022	K-8	750	225	30%
2022-2023	K-8	850	340	40%
2023-2024	K-8	900	405	45%

TeamCFA: Bonnie Cone Classical Academy submitted an application for an Implementation Only subgrant through the NC ACCESS Program for implementation in the 2019-2020 school year. TeamCFA: Bonnie Cone Classical Academy was recommended for approval by the CSAB and plans to enroll four hundred fifty (450) students during the 2019-2020 school year. The TeamCFA: Bonnie Cone Classical Academy subgrant application requests two hundred and fifty thousand dollars (\$250,000) to support program expenditures in years one (1) and two (2) of implementation.⁷ The school is managed by TeamCFA, a Charter Management organization (CMO).⁸

⁶ TeamCFA: Bonnie Cone Classical Academy Subgrant Application, page 4-5.

⁷ TeamCFA: Bonnie Cone Classical Academy Subgrant Application, Budget.

⁸ TeamCFA: Bonnie Cone Classical Academy Subgrant Application, page 1.

Summary of the Evaluation

In accordance with the NC ACCESS Program subgrant application scoring rubric, “in order to pass the review, applicants must (a) meet all criteria in sections (I), (II), and (VIII); and (b) score at least eighty (80) combined points between sections (III), (IV), (V), and (VI). Section (VII) will be used to determine priority if there are more eligible applications than subgrant awards.”⁹ The review committee’s average rating for each section of the application are as follows:

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section II – Assurances	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section VIII – Certification	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Total (must meet <i>all</i> standards to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Enrollment Projections	10	10
Section IV – Application Narrative	60	48
Section V – Budget, Budget Narrative, and Logic Model	30	29
Section VI – Competitive Preference Standards	Up to 12	3
Total (must receive at least 80 points to pass)	100	90

Priority Standards	Standards Possible	Standards Met
Section VII – Priority Consideration Status	4	N/A

Overall Application Status	Rating
In order to pass, the application must (a) achieve a rating of “Pass” for the General Standards and (b) score at least 80 points on the Technical Standards. The Priority Standards will be used to determine priority if there are more eligible applications than available awards.	<input type="checkbox"/> Pass with Priority
	<input checked="" type="checkbox"/> Pass
	<input type="checkbox"/> Fail

The review committee recommends that the subgrant application for TeamCFA: Bonnie Cone Classical Academy be approved. The applicant is proposing to locate in Huntersville, NC and indicated it is committed to identifying and removing any barriers that may prevent any student or family, especially those who may have circumstances that indicate an educational disadvantage (ED), from enrolling in the school.

⁹ <http://www.ncpublicschools.org/docs/charterschools/ncaccess/scoring-rubric.pdf>

The applicant provided a clear rationale for the enrollment projections for ED students as well as indicated that the implementation of a weighted lottery is an initial and critical step toward increasing the number of ED students who enroll in the school. The applicant referenced the ED student population in the area as evidenced by the economically disadvantaged population served in the local traditional public schools. The projected enrollment numbers are ambitious in that they exceed the number of ED students currently being served by charter schools in the immediate area of the school. Based on a review of the projections, the school plans to pursue the same year-to-year increases (i.e. ten percent (10%) increase from year one (1) to two (2), ten percent (10%) from year two (2) to three (3), etc.). The feasibility of this project and the year-to-year rate of growth in ED student enrollment were considered in light of the enrollment figures from schools in the general vicinity of the school. The applicant did not, however, outline the percentage of seats that would be reserved for ED students in the weighted lottery.

The applicant referenced its commitment to provide transportation and lunch. The school plans to work with any student and family facing a low-income circumstance to ensure that transportation and access to lunch are not an obstacle to their enrollment. For example, the school is planning to purchase or lease two (2) buses and offer cluster bus stops and has started marketing efforts to make the availability of transportation known to all new families. The applicant currently does not plan to participate in the National School Lunch Program; however, the school is pursuing a comprehensive lunch program through which ED students will have access to a hot meal on a free or reduced rate based on demonstrated economic need. More detail is necessary to determine the full viability of the lunch program.

In order not to exclude students and families who may face linguistic challenges from being recruited and enrolling in the school, the applicant plans to contract with an outreach consultant to ensure that all marketing materials are appropriately translated and that the content is culturally responsive to the targeted communities.

The applicant will operate on a traditional calendar. However, to address any deficiencies, the school will leverage subgrant funds to develop a curriculum that will support an extended learning program to increase the impact of the school's instructional model. Before-, after-, and Saturday-school tutoring opportunities will provide additional instructional time for ED students. The school also boasts a longer school day (8:00 AM – 4:00 PM) which allows for embedded tutoring opportunities.

Aligned with the project's emphasis on professional development, the school's calendar allots several days for staff training. The applicant indicated that, if awarded a subgrant, it will pursue a very ambitious and innovative approach to developing the strengths and capacities of the administration and staff. The expanded professional development opportunities will support the school's desire to effectively serve a greater number of ED students. Additionally, in support of the school's emphasis on teacher leadership, the applicant will partner with the Kenan Fellows Program for Teacher Leadership at NC State University. The one-year fellowship experience is focused on connecting teachers with industry leaders and/or researchers through internship opportunities, which bridges the gap between the classroom and the community and makes learning more authentic for students. In addition to completing an immersive summer internship opportunity alongside mentors, Kenan Fellows also receive eighty (80) hours of professional development on topics that range from classroom management to data analysis.

Exhibit A: NC ACCESS Program Eligibility Notification



PUBLIC SCHOOLS OF NORTH CAROLINA

DEPARTMENT OF PUBLIC INSTRUCTION | Mark Johnson, *Superintendent of Public Instruction*

WWW.NCPUBLICSCHOOLS.ORG

February 18, 2019

VIA EMAIL

Gregg Sinderson, TeamCFA - North Carolina State Director

TeamCFA: Bonnie Cone Classical Academy

4205 Quail Hunt Lane

Charlotte, NC 28226

gsinders@teamcfa.org

Dear Mr. Sinderson,

Thank you for your interest in the NC ACCESS Subgrant Program and for submitting a Letter of Intent (LOI). We are grateful for your commitment to the students of North Carolina. After a review of the LOI, eligibility criteria, and school performance data, TeamCFA: Bonnie Cone Classical Academy has been designated as eligible to apply for an Implementation Only subgrant for implementation beginning in the 2019-2020 school year. The Charter Schools Advisory Board (CSAB) will be notified of the eligibility status of all applicants on Monday, February 25, 2019.

Due to TeamCFA: Bonnie Cone Classical Academy's designation as eligible, TeamCFA: Bonnie Cone Classical Academy may move forward and submit the full subgrant application. As a reminder, completed applications are **due in Epicenter by 5:00pm (EDT) on March 31, 2019**. The NC ACCESS team will ensure you have access to the application portal in Epicenter and will contact you if any additional information is needed.

Please reach out to the NC ACCESS team at NCACCESS@dpi.nc.gov or (919) 807-3491 if you have any additional questions and visit the NC ACCESS page of our [website](#) for application and guidance materials and training information.

Sincerely,

A handwritten signature in black ink, appearing to read "Dave Machado".

Dave Machado, Director
Office of Charter Schools

DM/JW

OFFICE OF CHARTER SCHOOLS

6307 Mail Service Center, Raleigh, North Carolina 27699-6307 | (919) 807-3491 | Fax (919) 807-3496

Exhibit B: NC ACCESS Program Subgrant Application

General Standards

I. APPLICATION CONTACT INFORMATION

Charter School Information			
Name of charter school (Approved/Existing): TeamCFA: Bonnie Cone Classical Academy			
Mailing Address (Street, City, State, Zip): 9820 Northcross Center Ct., Huntersville, NC 28078			
Name of non-profit organization under which charter is/will be organized or operated: TeamCFA: Bonnie Cone Classical Academy			
Name of contact person: Joan Roman		Title/Relationship to approved/existing school: Head of School	
Primary telephone: (704) 661-6681		Alternative telephone:	
Email address: jroman@teamcfabcca.org		Website (if applicable): https://bccca.teamcfa.school/	
Name of county and local education agency in which charter school is/will reside: County: Mecklenburg LEA: Charlotte-Mecklenburg Schools			
Is or will the charter school be operated by an Education Management Organization (EMO) or Charter Management Organization (CMO): Yes No			
If so, please provide the name and list of all schools managed by the organization. CMO Name: TeamCFA (see Appendix A1 for more details) CMO-Managed Schools: TeamCFA: Bonnie Cone Classical Academy; TeamCFA: Community Public Charter (Approved Acceleration); TeamCFA: Pender (Awaiting Full Interview)			
Please indicate the subgrant category for which you are applying:			
Planning and Implementation	Implementation Only	Expansion	Replication

II. ASSURANCES

I, the undersigned, do hereby agree to comply with all assurances stated on pages 15-16 (listed below) of this application.

Juan Roman
Signature of Charter School Authorized Representative

3-22-2019
Date

Assurances

The charter school agrees to comply with all of the following provisions:

1. Recipients will (i) annually provide the North Carolina Department of Public Instruction such information as may be required to determine if the charter school is making satisfactory progress toward achieving the stated objectives and (ii) cooperate with the U.S. Department of Education and the North Carolina Department of Public Instruction in evaluating the entirety of the NC ACCESS program.
2. Recipients will, for the life of the subgrant, participate in all data reporting and evaluation activities as requested by the U.S. Department of Education and the North Carolina Department of Public Instruction; this includes participation in any federal or state funded charter school evaluations or studies, final grant report documentation, and financial statements.
3. Recipients will comply with federal laws including, but not limited to, the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and sections 613(a)(5) and 613(e)(1)(B) of the Individuals with Disabilities Education Act.
4. Recipients will comply with all provisions of the Non-Regulatory Guidance—Public Charter Schools Program of the U.S. Department of Education, which includes the use of a lottery for enrollment if the charter school is oversubscribed.
5. Recipients operate (or will operate if not yet open) a charter school in compliance with all state and federal laws and that the charter school does not discriminate based on race, gender, national origin, color, disability, or age.
6. Recipients shall ensure that a student's records, and, if applicable, a student's individualized education program as defined in section 602(11) of the Individuals with Disabilities Act, will follow the student, in accordance with applicable law (P.L. 107-110, section 5208).
7. Recipients will comply with all provisions of ESSA, including but not limited to, provisions on school prayer, the Boy Scouts of America Equal Access Act, the Armed Forces Recruiter Access to Students and Student Recruiting Information, the Unsafe School Choice

Option, the Family Educational Rights and Privacy Act (FERPA), and assessments [P.L. 107-110].

8. Internal Controls must ensure compliance with federal statutes, regulations, and terms of the award. Recipients will evaluate and monitor compliance, take prompt action when instances of noncompliance are identified, and safeguard protected personally identifiable information (PII).

9. Recipients possess the legal authority to apply for this grant; a resolution or motion has been adopted by the charter school's governing body that authorizes the submission of this application, including all understanding and assurances contained herein, directing and authorizing the "charter school contact person/administrator" to act in connection with the application and to provide such additional information as required.

10. Recipients will ensure that the awarded grant funds will be spent or encumbered in accordance with the guidance outlined in the Allowable Use of Funds section of this application.

11. Recipients shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for five full years from the date of final payment. The North Carolina Department of Public Instruction must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers and other records relating to the expenditures of grant proceeds. The recipient further agrees to comply with all federal and state audit requirements and ensures that arrangements have been made to finance those mandatory audits.

12. Recipients are required to keep and maintain all equipment purchased with grant funds in accordance with federal law and regulations.

13. Recipients will ensure equitable program participation, as required under section 427 of the General Education Provision Act.

14. Recipients will comply with the lower-tier certification covering lobbying and debarment/suspension in 34 CFR Parts 82 and 85.

15. Recipients understand that if any findings of misuse of grant funds are discovered, project funds must be returned to the North Carolina Department of Public Instruction and that the North Carolina Department of Public Instruction may terminate a grant award upon 30 days' notice if it deems that the recipient is not fulfilling the funded program as specified in the approved grant application.

16. Recipients shall attend all mandatory meetings/trainings required by the North Carolina Department of Public Instruction.

17. Recipients agree that the lead administrator and a board member of the charter school

will participate fully in all required activities of the NC ACCESS Fellowship program.

18. Recipients agree to onsite monitoring by the North Carolina Department of Public Instruction as necessary to ensure that the subgrant is used for authorized purposes, in compliance with Federal statutes, regulations, and the terms and conditions of the subgrant; and that subgrant performance goals are achieved.

19. Recipients agree to use financial management systems, including records documenting compliance with Federal statutes, regulations, and the terms and conditions of the Federal award, that are sufficient to permit the preparation of reports required by general and program-specific terms and conditions; and the tracing of funds to a level of expenditures adequate to establish that such funds have been used according to the Federal statutes, regulations, and the terms and conditions of the Federal award.

20. The applicant understands that, as articulated in the charter agreement, the renewal or revocation of the charter is based on the academic, operational, and financial performance of the school as outlined and reported through the NC Charter School Performance Framework.

21. The applicant understands that, as stated in the charter agreement, it has autonomy and flexibility in the planning, development, and implementation of the education program, including over budgetary and financial decisions.

Technical Standards

III. ENROLLMENT PROJECTIONS

Grade Levels and Student Enrollment

Subgrant Year	Current Grade Levels Served	Projected Grade Levels Served	Current Student Enrollment	Projected Student Enrollment
2019-2020	K-6	K-6	450	450
2020-2021	K-7	K-7	600	600
2021-2022	K-8	K-8	750	750
2022-2023	K-8	K-8	850	850
2023-2024	K-8	K-8	900	900

Educationally Disadvantaged Students (Including those who are economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities)

Subgrant Year	<u>Current</u> ED Student Population		<u>Projected</u> ED Student Population	
	Number of Students	Percent of Total Enrollment	Number of Students	Percent of Total Enrollment
2019-2020	45*	10%*	45*	10%*
2020-2021	72*	12%*	120*	20%*
2021-2022	113	15%	225	30%
2022-2023	153	18%	340	40%
2023-2024	180	20%	405	45%

Current ED Student Population is estimated based on enrollment without the support of an NC ACCESS subgrant.

Projected ED Student Population is projected assuming receipt of an NC ACCESS subgrant award.

*BCCA is proposing a two-year project but is providing five year data to showcase the desired lasting impact this project will have on the school beyond the proposed project period.

IV. APPLICATION NARRATIVE

Overview and Context

The following proposal from Team CFA: Bonnie Cone Classical Academy (hereafter referred to as BCCA) is submitted in response to the universally recognized need and emphasis of the NC ACCESS Program to discover more innovative approaches to recruiting, enrolling and serving educationally disadvantaged (ED) students. Since 2011, NC has seen a significant increase in the number of charter schools, which points to an increased responsibility to explore strategies that best serve *all* students. It is through this proposal and the support of NC ACCESS Program subgrant funds that BCCA seeks to implement innovative, ambitious and research-based best practices to serve a greater number of ED students. Further, as this proposal will stipulate, BCCA strives to move beyond the implementation of these strategies as it seeks to also expand and contribute to existing research through a strategic evaluation of the proposed strategies.

BCCA will be located in the Huntersville area, a developed and ever-growing suburb of Charlotte. In an area of the state that boasts a median household income higher than the state average and an unemployment rate lower than the state average¹, it is easy and tempting to become complacent in the way the school markets to and recruits students. However, as evidenced by the fact that several LEA schools in the area serve an economically disadvantaged student population at or above the state average (*see Table 1 below*), there is a need and, in response to that need, BCCA is committed to implementing the aggressive plan outlined in this proposal to recruit and effectively serve a greater number of ED students and their families.

The following proposal will outline the ways in which BCCA will leverage NC ACCESS Program funds to pursue an ambitious, yet realistic plan for increasing the school's educationally disadvantaged student population. This plan includes an intentional and strategic approach to recruiting, enrolling and effectively serving ED students and their families, with all of the strategies being actively evaluated for their efficacy and efficiency. It is through the project's results and findings that BCCA seeks to develop and disseminate a framework of evaluated strategies to charter and traditional public schools.

This proposal is being submitted concomitantly with another TeamCFA school, TeamCFA: Community Public Charter. The similar and consistent language across the schools' proposals is intentional and an integrated part of the evaluation process. Each school offers a different context for implementation, therein providing distinct case studies through which the impact and scalability of the proposed strategies can be evaluated.

Subsection A: Rationale for Projected Enrollment Figures

As an initial and critical step toward increasing the number of educationally disadvantaged students who enroll in the school, BCCA will submit a charter amendment request to implement a weighted lottery based on socio-economic status. The implementation of a weighted lottery will support the ambitious, yet realistic enrollment figures listed in the enrollment projections. It

¹<https://www.areavibes.com/huntersville-nc/employment/>

should be noted, however, that the provided enrollment numbers are merely estimates since the school has not officially opened and it is difficult to determine specific percentages. Actual numbers may and will likely vary from those provided. However, regardless of the actual baseline number in year 1, the school plans to pursue the same year-to-year increases (i.e. 10% increase from year 1 to 2, 10% from year 2 to 3, etc.). The feasibility of this project and the year-to-year rate of growth in ED student enrollment were considered in light of the enrollment figures from schools in the general vicinity of the school. In analyzing the data, economically disadvantaged student populations served as a proxy for educationally disadvantaged students.

Table 1: % of Economically Disadvantaged Students Currently Served at Local Schools

Schools	Economically Disadvantaged Student Population <i>(2016-17 school report cards)</i>
Traditional Public Schools (LEA - Charlotte Mecklenburg Schools)	
Blythe Elementary School	48.2%
Highland Creek Elementary School	28.6%
Mallard Creek Elementary School	51.7%
J.M. Alexander Middle School	49.2%
Charter Schools	
Mallard Creek STEM Academy	12.8%
Pioneer Springs Community School	14.2%
Corvian Community School	<5%
Lake Norman Charter School	<5%

State average for economically disadvantaged students is 49.2%.

As *Table 1* illustrates, BCCA’s projected ED student enrollment numbers are realistic in that there is an obvious ED student population to be served in the area as evidenced by the economically disadvantaged population served in the local traditional public schools. The projected enrollment numbers are ambitious in that they exceed the number of educationally disadvantaged students currently being served by charter schools in the immediate area of the school. As such, BCCA’s projected enrollment numbers demonstrate a commitment to serve a greater number of ED students and pursue bold and innovative strategies in order to do so effectively. Though BCCA’s projected ED enrollment numbers will remain less than the state average by the end of the proposed project period (two years), an intended outcome of the project is that the implementation of the strategies outlined in this proposal will have a sustainable and lasting impact on the school that will facilitate continual increases in the number of ED students who enroll in the school well beyond the end of the project period.

Subsection B: Educational Program

BCCA will ensure that the school's educational program is tailored to meet the needs of all students, especially those who may be educationally disadvantaged. Intrinsic in the design of the Core Knowledge curriculum is an approach that supports ED students, as described by the Core Knowledge Foundation below²:

“Advantaged students who arrive in the classroom with background knowledge and vocabulary will understand what a textbook or teacher is saying and will therefore learn more. Disadvantaged students who lack such prior knowledge will fail to understand and thus fall even further behind, relative to their fellow students.

Only by specifying the knowledge that all children should share can we guarantee equal access to that knowledge. In our current system, disadvantaged children especially suffer from low expectations that translate into watered-down curricula.

It's important to begin building foundations of knowledge in the early grades because that's when children are most receptive. Academic deficiencies in the first eight grades can permanently impair the quality of later schooling.”

Beyond the inherent capacities of the curriculum to serve ED students by building a foundation of requisite knowledge, BCCA will also seek to augment the educational program by pursuing an aggressive and comprehensive professional development program for the administration and school staff (*see Subsection K: Professional Development*) that will build capacity in areas beyond curricular content. By building staff capacity through professional development, the educational program and, by extension, the school will demonstrate an increased ability to both implement the curriculum with fidelity and meet students where they are.

Also, a critical part of this proposal is the desire to develop a curriculum to support a summer extended learning program that will decrease the amount of learning loss that occurs over summer break, specifically among those subgroups that face an educational disadvantage. As such, as described above, inherent aspects of the Core Knowledge curriculum support and serve ED students and, through this proposal and subgrant funds, those positive aspects of the curriculum and educational program will be extended beyond the academic year.

Though the school already boasts a slightly longer school day (8:00-4:00), the school plans to use subgrant funds to offer tutoring sessions before and/or afterschool and/or on Saturdays. To provide this extra level of support, BCCA will contract with an individual tutor or work through a tutoring service in the local community (*see Budget Narrative*). BCCA will plan to strategically offer these tutoring sessions at a time and in a place that is most convenient for ED students and their families. This may include offering the tutoring sessions at a location other than the school (i.e. community center, church, library, etc.) to better serve those in a particular area who may have limited access to transportation.

BCCA believes that the inherent benefits of the curriculum coupled with the aggressive strategies described throughout this proposal will improve the access and achievement of the ED students who enroll in the school. Beyond the ability to better serve ED students during the

²<https://www.coreknowledge.org/our-approach/knowledge-based-schools/>

project period, this opportunity will allow the school to adopt a culture of continuous improvement and innovation that will benefit the school and the students it serves well beyond the end of the project period.

Subsection C: Goals

Through this opportunity and with the support of subgrant funds, BCCA plans to pursue the following goals. These goals are ambitious, yet feasible and work in support of the NC ACCESS Program’s goals and the Department of Education’s Charter School Program (CSP) funding priorities.

- ***Goal 1: Educationally disadvantaged students attending BCCA will outperform their counterparts in the same subgroups in the LEA on the 4th grade End-of-Grade math and reading assessments by at least 10% in the first year and 15% in the second year of the project period.***

Table 2: Current LEA and Projected Data on 4th Grade EOG Assessments

	Current Data (LEA)*	Projected Goal-Related Data (BCCA), assuming no change in LEA data	State Average*
End-of-Grade Math			
Economically Disadvantaged	48%	Yr. 1: 53%; Yr. 2: 56%	44.5%
Limited English Proficiency	28.3%	Yr. 1: 32%; Yr. 2: 33%	20.9%
Student with Disabilities	24.5%	Yr. 1: 27%; Yr. 2: 29%	25.8%
End-of-Grade Reading			
Economically Disadvantaged	40.5%	Yr. 1: 45%; Yr. 2: 47%	43.2%
Limited English Proficiency	14.8%	Yr. 1: 17%; Yr. 2: 18%	10.3%
Students with Disabilities	21.3%	Yr. 1: 24%; Yr. 2: 25%	22.9%

**2016-17 State, District, and School Level Drilldown Performance Data, NCDPI Accountability
Numbers are rounded up since the goal is to serve at least 10% and 15%.*

This goal is ambitious as it predicts a continual increase in student achievement over the project period as compared to the same subgroups in the LEA and across the state. While the school wants to have achievement rates higher than those predicted, the listed percentages are realistic in that they take into consideration an increased number of ED students enrolling in a school that is also navigating the opening process. Ultimately, this goal illustrates BCCA’s commitment to differentiate itself in the way that it serves and develops students who are educationally disadvantaged.

Data Collection Method(s) and Timeframe(s): Data will be analyzed and progress toward the stated goal will be determined on an annual basis once state assessment data is released. Benchmark student achievement data will be collected through the utilization of the NWEA-MAP test, which will be administered at the beginning of the academic year, mid-year and end-of-year.

- **Goal 2: By August 2021, using economically disadvantaged students as a proxy, educationally disadvantaged students will represent at least 30% of the total student enrollment at BCCA.**

As described in *Table 1* and *Subsection A: Rationale for Projected Enrollment Figures*, BCCA will strive to recruit and enroll a greater number of educationally disadvantaged students. The goal of a 30% ED student population is realistic since the local schools in the LEA indicate the presence of an ED student population in the immediate area of the school. This goal is ambitious as it exceeds the percentage of ED students served by charter schools in the immediate area. It is through the innovative and determined strategies outlined in this proposal that BCCA will pursue and achieve this goal. As previously mentioned, if the baseline varies from what is projected, the school will still pursue the same year-to-year increases (10% in year 1, 10% in year 2, etc.).

An ambitious, yet realistic approach to this goal is as follows:

Table 3: Projected ED student enrollment increases (%)

August 2019*	August 2020	August 2021
10%	20%	30%

**Baseline projection is prior to the implementation of the proposed interventions. Economically Disadvantaged students will be used as a proxy for educationally disadvantaged students.*

Data Collection Method(s) and Timeframe(s): As part of normal school operations, student enrollment will be monitored and reported on throughout the year.

- **Goal 3: Each year of the project period, BCCA will endeavor to build productive relationships with the LEA and other charter schools to share best practices in serving educationally disadvantaged students through the planning and implementation of quarterly “collaboration roundtables” with at least two LEA representatives and four charter schools.**

In support of the NC ACCESS Program and the school’s goal to improve collaboration among charter schools and between charter schools and traditional public schools, BCCA endeavors to schedule quarterly “collaboration roundtables” that will engage local charter and traditional public schools. This goal also supports the NC ACCESS Program’s fellowship-specific expectation to host “collaboration confabs” and exceeds that expectation by making it an ongoing part of the school’s outreach plan. This goal will ensure that the approval of this proposal will create a sustainable focus that will, hopefully, create a regularly convened group of professionals who are actively seeking out and sharing best practices for serving ED students.

Below is a general timeline (year 1) to ensure progress toward the defined goal:

Activity	Approximate Timeframe
Initiate contact with representatives from the LEA and charter schools	August-September 2019
Receive commitments to participate in quarterly “collaboration roundtables”	October 2019

Host first “collaboration roundtable”	November 2019
Host “collaboration roundtables” each quarter for the remainder of and beyond the project period	Duration of and beyond the project period

A unique aspect of this proposal is that, in addition to the goals outlined above, BCCA will pursue and consider some critical research questions that will, hopefully, contribute to and expand the body of knowledge related to serving ED students. By evaluating the project’s implementation and the research questions below, BCCA will be able to disseminate data-supported best practices and explore the more conceptual aspects of how to best serve all students.

Research Plan
<p>Research Questions</p> <ol style="list-style-type: none"> 1. Does the intentional and strategic investment in staff professional development result in a school’s ability to better serve educationally disadvantaged students? Do whole staff trainings or individualized training opportunities provide greater impact and return on investment (ROI) on time and financial investment? 2. Is authentic and mutual collaboration more efficiently developed through regularly scheduled meetings involving charter and traditional public school leaders, or by engaging staff in larger PD programs that serve both charter and traditional public schools? 3. When implementing a new project, like the one outlined in this proposal, are students and their families aware of the intended purpose and resources available? If there is an awareness, how are projects like this viewed by students and their families (i.e. does it impact their decision to enroll)? 4. What impact, if any, do extended programs (i.e. summer programs) have on student achievement?
<p style="text-align: center;">Evaluation Strategies</p> <p>Methods: (a) Administration Interviews; (b) Teacher Group Interviews; (c) Informal Student Group Interviews; (d) Anonymized Student Surveys; (e) Anonymized Parent Surveys; (f) Pre-Post Professional Development Surveys; (g) Student Achievement Data</p> <p>Frequency: (I) Quarterly; (II) Bi-annually; (III) Activity-Based; (IV) Following State Assessments</p>
<p>Research Question 1 - (a)(I); (b)(II); (e)(III)</p> <p>Research Question 2 - (a)(II)</p> <p>Research Question 3 – (c)(II); (d)(II); (e)(II)</p> <p>Research Question 4 – (d)(III); (e)(III); (g)(IV)</p>

The strategic exploration of the efficacy of the proposed strategies and the research questions above will lead to the development of new resources and approaches that can be shared with the broader education community. BCCA will partner with Craig Tucker, founder and manager of ImplementEd, LLC., to conduct the evaluative and research aspects of the project. Using the data collected in a formative capacity, Mr. Tucker will assist the school in the development of new

and potentially more impactful methods of recruiting and serving ED students. Beyond providing evaluation services, ImplementEd will support this project in a number of ways, all of which are outlined in *Subsection G: Partnerships* and in a scope of work in Appendix F3.

Subsection D: Comparison of Educational Plan with LEA

The most obvious and significant difference between the educational plan at BCCA and the LEA is the school's use of the Core Knowledge curriculum. This curriculum includes an integrated language arts and common core-aligned component, Core Knowledge Language Arts (CKLA). As part of CKLA, students in grades K-3 will start to develop their reading, writing and vocabulary through two integrated strands: "Skills" and "Listening and Learning." CKLA in grades 4-6 will build on this foundational knowledge through the exploration of content-specific units, which will further expand students' reading, writing and vocabulary knowledge. The ultimate goal is that this scaffolding will enable students to transition their prior knowledge and experience to current, real-world applications. Extensive information on the Core Knowledge and CKLA curriculum, including supporting research, is provided by the Core Knowledge Foundation.

In terms of math instruction, BCCA will utilize the basic elements of Singapore Math, which are primarily explored through the use of Eureka Math. Singapore Math encourages students to take a hands-on approach to mathematics and helps students comprehend the essential aspects of math, including place values, number sense, etc. Equipped with a more comprehensive and deeper understanding of the basics, students are encouraged to apply their understanding to real world problems and applications.

Both CKLA and Singapore Math enables all students, regardless of any potential educational disadvantage, to develop an important foundational knowledge. A lack of this requisite knowledge and experience is compounded as students move into higher grades. As such, in addition to differentiating BCCA's educational plan from that of the LEA, the use of CKLA and Singapore Math places students on a trajectory that will allow them to explore and excel in more advanced topics as they progress through grade levels.

To ensure that the curricular components outlined above are implemented with absolute fidelity, the school is seeking to leverage subgrant funds to purchase kits containing CKLA curriculum (Amplify) and math manipulatives (Eureka Math). Additionally, BCCA plans to contract with a Core Knowledge trainer to provide an onsite training session in year one of the project period. The language arts and math kits and Core Knowledge trainer are listed in the budget and corresponding narrative.

In addition to the unique curriculum that will be taught, BCCA will also utilize the NWEA-MAP testing protocol to assess student growth. This tool, or aspects of it, may be used by the LEA; however, BCCA will utilize it extensively to measure student growth. Data collected from this assessment will be critical in the formative development and improvement of the educational program at the school. To ensure that the school is utilizing data and the assessment tool appropriately, BCCA is planning to contract with NWEA to conduct a full day training at the school in each year of the project period. As a way of increasing collaboration, representatives from the LEA will be invited to attend the training.

Subsection E: GEPA

BCCA is committed to identifying and removing any barriers that may prevent a student and their family, especially those who may have circumstances that indicate an educational disadvantage, from enrolling in the school. First and foremost, the school is working to ensure that the school facility is accessible to any student, staff or visitor with a physical disability, as the school facility will be in compliance with the requirements of the American Disabilities Act (ADA).

BCCA will work with any student and family facing a low-income circumstance to ensure that transportation and access to lunch are not an obstacle to their enrollment (see *Subsections M: Transportation* and *N: School Lunch* for more details). Similarly, in an effort to not exclude students and families who may face linguistic challenges from being recruited and enrolling in the school, BCCA will contract with an outreach consultant to ensure that all marketing materials are appropriately translated and that the content is culturally responsive to the targeted communities. In response to the critical role mental health can play in student achievement, BCCA is committed to leveraging subgrant funds to contract with a mental health professional who will provide ongoing support to ensure that student achievement and the school environment are not impacted by the lack of access to mental health support. Following the project period, BCCA will explore other grant opportunities, including any offered by the state, that would allow the school to continue providing this essential service.

Subsection F: Strategies for Serving ED students

As described in more detail in *Subsection L: Marketing and Recruiting Plan*, the school plans to launch an ambitious and aggressive marketing campaign to ensure that a lack of awareness is not an obstacle for ED students and their families. The outreach plan will leverage the expertise and input of an outreach consultant with significant experience in reaching the targeted communities. Additionally, this consultant will be involved in the development of new marketing materials to ensure that all materials are reader-friendly and aligned with best practices in the field of marketing.

Following an intensive focus on increasing awareness, the next step for serving ED students is addressing potential barriers to their attendance. BCCA is planning to provide transportation via a cluster bus stop model. BCCA remains committed to pursuing this service to support students who may have limited access to transportation. As described in further detail in *Subsection M: Transportation Plan*, the school will actively and regularly survey parents to identify any changes in their transportation needs. If a family presents an issue with transportation that cannot be addressed by the cluster bus stops, the school will work individually with that family to find a resolution.

As stated in the charter application, the school expects students to bring their own lunch; however, the school remains committed, as evidenced by the inclusion of funds in the school's operating budget, to support any child that arrives at school without a lunch. The administration and staff at BCCA will receive relevant training and become increasingly more attentive to this possibility and will respond quickly to identified needs.

Another critical step in serving ED students is having teachers and staff that are amply trained and responsive to the needs of their students. The professional development program described in *Subsection K: Professional Development Plan* reflects a strategic and intentional focus on building staff capacity around those topics that impact a school's ability to serve ED students. Though the PD plan directly benefits the administration and staff, the students will be

the ultimate beneficiaries as they will have access to teachers who are aware of students' challenges and equipped to help them grow despite those challenges.

A final step for effectively serving ED students is providing students with extended learning opportunities and critical support services. The school seeks to develop a STEM-integrated curriculum to support a summer extended learning program that will help decrease the amount of learning loss that occurs over summer break, especially amongst ED student subgroups. BCCA wants to develop a sustainable program component that is not dependent on subgrant funds. As such, no subgrant funds will be used to support the actual operation of the summer program. The curriculum that supports the 3-4 day, half day summer program will be developed through an innovative partnership with the Kenan Fellows Program for Teacher Leadership at NC State University. The initial implementation of the curriculum (two summers) will be built into the expectations of the Kenan Fellowship (A detailed step-by-step explanation of the curriculum development process is provided in Appendix F1). Existing materials and supplies from the school will be utilized to operate the summer program during the initial two summers. This approach will ensure the development of a streamlined and cost-effective student support service which will require minimal investment to maintain after the project ends. To contribute to its sustainability and as a cost-sharing measure, TeamCFA is committed to providing \$5,000 to the school to help support the summer program following the initial pilots. Once this contribution has been exhausted, operational costs will be offset by foundation and community grants and/or through partnerships with local industries and organizations.

Another support service that the school will provide is before and/or afterschool and/or Saturday tutoring opportunities. The exact times and days that this will be offered will be determined via a needs assessment. This will be accomplished by contracting with either an individual tutor or a tutoring business in the local community. Approximately 14-16 hours of tutoring time will be provided each month. BCCA will seek input from families on where and when to offer these tutoring sessions.

Though not a direct intervention or strategy for serving ED students, the school's goal of fostering collaboration among charter schools and between charter and traditional public schools will ultimately improve the school's ability to serve its ED student population. Through the sharing of ideas and best practices, the school will gain access to lessons learned that may improve upon or expand the strategies outlined in this application.

Subsection G: Partnerships

The most significant partnership the school has and will maintain is its relationship with its CMO, Challenge Foundation Academy (TeamCFA). In addition to providing valuable start up assistance and management services, TeamCFA provides ongoing support related to school operations and the Core Knowledge curriculum (*see Appendix C6*). A unique advantage that this partnership offers in this project is the ability to easily disseminate all newly developed resources and strategies through a national network of schools, thereby expanding the impact and scalability of the project's components.

In an effort to establish a positive, "all-in" school culture, BCCA will partner with Learning for Living, an organization that works with schools and teachers to develop a culture in which innovative ideas and projects can be supported through a reliance on relationships and "buy-in" from staff members. Learning for Living's goal is to work with teams to build and share a productive and welcoming school culture where students of all backgrounds can grow and thrive.

BCCA will also partner with the Kenan Fellows Program for Teacher Leadership at NC State University. This program has provided authentic and immersive learning experiences for over 450 teachers across the state. This program provides teachers with a one-year fellowship experience wherein they are paired with at least one mentor in industry or research (see *Subsection K: Professional Development Plan*). Beyond the program's defined and comprehensive professional development experiences, the Kenan Fellows Program has a robust alumni network through which fellows can continue to share and learn with other teachers from both charter and traditional public schools once their fellowship has ended. This unique and innovative partnership will ensure that the four teachers from BCCA who are sponsored and selected from BCCA to participate in the Kenan Fellows Program will be equipped and empowered to assume a leadership role in the school. A full description of this partnership is provided in Appendix F1.

Recognizing the magnitude of this project and the importance of maintaining the instructional focus of the administration and staff, BCCA will partner with ImplementEd, LLC to assist in the implementation of the proposed strategies and provide broad-range support to the administration and staff. ImplementEd, LLC will conduct the evaluation strategies outlined in *Subsection C: Goals* and then leverage the evaluation data to:

- 1.) Ensure alignment between professional development offerings and teacher/school needs, including regularly sharing aligned professional development opportunities that may exist beyond those mentioned in this proposal.
- 2.) Provide regular updates on evaluation findings to the school administration as well as an annual report with recommendations for improvements, which will be used formatively to make modifications to the services provided to ED students and their families.
- 3.) Develop a process through which newly acquired knowledge and skills can be captured following a professional development experience and then transition the information into a continually updated and easily accessible staff professional development curriculum.
- 4.) Monitor the effectiveness of existing classroom-level informal assessment strategies and propose new and appropriately aligned techniques that will provide greater insight into student achievement, especially among educationally disadvantaged subgroups.
- 5.) Serve as the school-level mentor for the teachers completing a Kenan Fellowship and assist in the development and implementation of the summer extended learning curriculum and program.

Letters of support from all of the partner organizations described above can be found in Appendix C.

Subsection H: Governance

In addition to overseeing the school's operational, academic and financial health, the board of directors plays a pivotal role in developing community partnerships. As it relates to this project, the board of directors will strategically and actively pursue partnerships with community organizations who already serve or have demonstrated success in serving educationally disadvantaged students. In addition to potentially engaging those organizations in the project's implementation, this effort will cultivate new partnerships that will facilitate the dissemination of best practices and lessons learned through the project, thereby potentially extending the reach of this project to the community at-large.

Additionally, the board of directors will stay actively engaged and informed on the project's progress via regular updates from the school's administration. Consistent with this project's data-driven and formative approach, the board of directors may potentially make changes to the school calendar and other aspects of the school's financial and operational plan to better serve and accommodate ED students and their families.

Subsection I: Calendar

BCCA will operate on a traditional calendar, which, admittedly, research suggests may lead to learning loss during the summer, especially for those who may come from a low-resource environment and specifically in the areas of math and reading. To address this deficiency, the school will leverage subgrant funds to develop a curriculum that will support an extended learning curriculum to increase the impact of the school's curriculum. Before/after school and Saturday tutoring opportunities will provide additional instructional time for ED students. The school also boasts a longer school day (8:00-4:00) which allows for embedded tutoring opportunities. Aligned with this project's emphasis on professional development, the school's calendar also has a generous number of days allotted for staff training. Therefore, even though there is nothing particularly unique about the school's calendar, the school will strive to adapt a ubiquitous calendar model in an effort to pursue a strategically designed plan to serve those who may face a disadvantage.

As mentioned in *Subsection H* above, the board of directors may consider changes to the school calendar that will better serve and accommodate ED students and their families.

Subsection J: School Climate and Disciplinary Procedures

As defined in the school's charter application, the school places a strong emphasis on virtue and the building of character in all students. The school's goal is to create a safe, respectful and responsible environment where learning takes place. Discipline policies and procedures are designed to provide guidance and direction on responsible and acceptable behavior. The school's discipline model is designed to teach students appropriate behavior, attitude and response in all situations and develop a sense of self-governance. The school's teachers and administrators will set the tone on virtuous behavior. Virtuous behavior will also be reinforced in the classroom during instruction when appropriate.

The school also strives to maintain a highly effective learning environment where students can focus on gaining knowledge with as few distractions as possible. The school will utilize all disciplinary interactions as an opportunity for students to learn about themselves and others, and to provide students with actual character education. Additionally, through its disciplinary procedures, the school will reinforce the importance of treating all students with fairness, respect, and equality.

To support the school's desired climate and, hopefully, reduce the occurrence of discipline problems, BCCA will contract with a mental health services provider who will provide direct support and advise the administration and staff on strategies for engaging with students who may exhibit negative behaviors as a result of trauma or a mental crisis or illness.

Subsection K: Professional Development Plan

If awarded a subgrant, BCCA will pursue a very ambitious and innovative approach to developing the strengths and capacities of the administration and staff. The expanded professional development opportunities described below work in support of the school's desire to effectively serve a greater number of ED students as well as the legislative mandate in GS 115C-218 to "create new professional opportunities for teachers, including the opportunity to be responsible for the learning program at the school site." All professional development expenses are outlined in the budget and corresponding narrative.

As an initial professional development focus, BCCA will endeavor to create a positive, "all-in" culture at the school. Making this the first professional development priority is critical to the implementation of all other strategies. To help cultivate an "all-in" culture, the school will partner with Learning for Living, an organization founded by Phil Boyte in 1984. Mr. Boyte has developed innovative programs such as Link Crew, WEB and Breaking Down the Walls, as well as authored a book entitled "School Culture by Design." Through this partnership, Learning for Living will walk the BCCA faculty through a step-by-step roadmap for building a thriving school culture that works for *all* students. The partnership with Learning for Living entails two on-site training sessions over the project period and a group of six staff members attending a North Carolina-based School Culture Summit in year one. More information on this partnership as well as a letter of support can be found in Appendix C1.

In support of the school's emphasis on teacher leadership, BCCA will partner with the Kenan Fellows Program for Teacher Leadership at NC State University. A unique aspect of this one-year fellowship experience, which has garnered multiple awards and received national recognition, is the focus on connecting teachers with industry leaders and/or researchers through internship opportunities, which bridges the gap between the classroom and the community and makes learning more authentic for students. In addition to completing an immersive summer internship opportunity alongside mentors, Kenan Fellows also receive 80 hours of professional development on topics that range from classroom management to data analysis. Program activities are planned in such a way to allow teachers to remain in the classroom and miss minimal instructional time. Working within a mentored environment, Kenan Fellows develop curriculum that can be implemented in their school as well as disseminated through the Kenan Fellows Program Alumni Network and the program's expectation that fellows attend and present at a professional conference. Through this unique partnership with the Kenan Fellows Program, BCCA will leverage subgrant funds to sponsor four teachers (2 per year) in the program. As part of their participation in the program, the selected teachers will develop a robust and engaging summer extended learning curriculum focused on math and reading, which research suggests are the two subjects most impacted by summer break³.

The selected teachers will receive a \$5,000 stipend paid by the Kenan Fellows Program to support their time and effort in completing programmatic requirements and developing and implementing new curriculum resources. An investment of time and funds in this partnership will lead to 1.) the creation of a robust and rigorous summer extended learning curriculum; 2.) the development of teachers who are equipped and empowered to assume leadership roles in the school; and 3.) access to an alumni network of charter and traditional public school teachers

³Kufeld, M. (2018, July 16), Summer Learning Loss, What We Know and What We're Learning. Retrieved March 21, 2019, from <https://www.nwea.org/blog/2018/summer-learning-loss-what-we-know-what-were-learning/>

through which the teachers, and by extension the school, can share and learn about best practices in serving ED students. This unique partnership and investment of subgrant funds ensures a sustainable impact well beyond the end of the project period. A full description of the fellowship and curriculum development process is provided in Appendix F1 and a letter of support is provided in Appendix C2.

Another tier of this comprehensive professional development plan is the integration of several content-specific professional development opportunities. BCCA will utilize subgrant funds to:

- 1.) Provide on-site Core Knowledge curriculum training (yr. 1).
- 2.) Support on-site training on *A Framework to Understanding Poverty* provided by a consultant from Ruby Payne's Aha! Process organization (yr. 1).
- 3.) Host on-site training from NWEA focused on the use of assessment data (yrs. 1 & 2).
- 4.) Send two staff members to NCDPI's annual EC conference (yrs. 1 & 2).

BCCA is also committed to the NC ACCESS Fellowship Program. Both a school leader and a member of the board will participate in all fellowship activities and, as part of their participation, actively strive to disseminate and learn best practices. This commitment is reflected in the budget and related justification.

Naturally, BCCA seeks to protect and preserve the importance of the instructional day, so, when possible, the professional development opportunities mentioned above will be coordinated in such a way to take advantage of workdays that are already built into the school's existing calendar, thereby limiting the impact on instructional time and responsibilities.

Subsection L: Marketing and Recruiting Plan

To date, BCCA has utilized targeted zip code mailings, visited daycare centers and used social media. Members of the board of directors and school representatives have contacted area churches and civic organizations in hopes of reaching ED students and their families. As part of hosted parent information sessions, the school has also intentionally addressed how ED students will be identified and served in the school.

BCCA will leverage subgrant funds to greatly increase the school's marketing efforts and the impact of those efforts. A key focus of this is to contract with an outreach consultant who can assist and advise the school on the most innovative and impactful marketing strategies. This consultant would play a central role in the development of new marketing materials that are aligned with industry best practices. Upon receipt of subgrant funds, the school will initiate a procurement process to identify a consultant or firm that has a proven track record of employing strategies that increase stakeholder/client interest and engagement. The school also intends to contract with an outreach consultant who will assist in developing new marketing materials that are accurate and culturally responsive to the targeted communities.

The school plans to leverage the board of director's efforts in developing relationships with community organizations (*see Subsection H: Governance*) to utilize the partner organization's existing marketing channels.

Subsection M: Transportation Plan

As stated in the charter application, the school is planning to purchase or lease two buses and offer cluster bus stops and has started marketing efforts to make the availability of transportation

known to prospective students and families. However, as part of an increased marketing effort, the school will include this information on all new marketing materials.

Additionally, to ensure an ongoing inquiry into the needs of students and their families, BCCA will administer bi-annual surveys asking if students and their families have had any changes in their transportation needs. In addition to the biannual survey, a survey link will be kept permanently on the school's website which will allow families to indicate a change in their transportation needs at any point during the academic year. If a student and their family are not adequately served by the cluster bus stop approach, the school will work with those families to figure out a different approach that best serves the family's needs (i.e. organized carpools, etc.). Surpluses that may occur in the school's original budget due to start-up costs being offset by subgrant funds may, depending on need, be used to expand the cluster bus stop model or to coordinate alternate transportation arrangements for families not effectively served by the cluster bus stops (i.e. contracting with a private provider).

Subsection N: School Lunch Plan

BCCA currently does not plan to participate in the National School Lunch Program (NSLP); however, the school is pursuing a comprehensive lunch program through which educationally disadvantaged students, specifically those who may face low-resource circumstances, will have access to a hot meal on a free or reduced rate based on demonstrated economic need. Similar to the transportation plan, surpluses that may occur due to offset start-up costs may be used to provide even more support in this area.

As part of an increased focus on how to best serve educationally disadvantaged students, BCCA will increase its marketing and outreach efforts around this aspect of the school to ensure that eligible students and their families are aware of this support service. Additionally, a survey will be permanently placed on the school's website through which families can indicate their need at any point. As outlined in other sections of this proposal, the school will leverage grant funds to significantly increase their marketing efforts, which will include language on the school's goal to remove any barrier related to meals and offer an inclusive lunch program.

Depending on the number of families needing assistance, the school and board of directors may evaluate and consider the possibility of participating in the NSLP.

Subsection O: Parent/Community Advisory Council Plan

As a general best practice and in alignment with NC ACCESS Program expectations, BCCA will implement a parent/community advisory council. This council will be instrumental in providing critical feedback on the implementation of the strategies outlined in *Subsection F: Strategies for Serving ED Students* as well as the general operational aspects of the school.

The advisory council at BCCA will be comprised of eight members, with at least four of those members representing the community at-large. ImplementEd, LLC/Craig Tucker will be involved in an advisory capacity to provide insights related to evaluation findings. To ensure a broad representation of perspectives, council members will serve in staggered term limits, with no member serving more than 3 years. Council members will be appointed by the school's board of directors. The board of directors will release a request for applications for membership on the advisory council. In an effort to avoid duplicative processes, applications will be considered in the same subcommittee through which nominations and appointments to the board of directors

are also considered. Depending on the number of applications received, the board of directors may conduct interviews during a regularly scheduled board meeting.

The advisory council will meet three times annually. During the first meeting, the advisory council will nominate and elect a chairperson, vice chairperson and secretary. The chairperson will facilitate the meetings. The vice chairperson will assist the chairperson in their leadership role and, when necessary, serve as the primary facilitator of the advisory council meeting. The secretary will be responsible for maintaining accurate and detailed minutes which will be shared with the board of directors, administrative team and NC ACCESS Program staff within three weeks following a meeting.

At least one representative from the advisory council will attend every board of directors meeting. This representative will provide a brief summary of the advisory council's activities and suggestions at the board of directors' meeting immediately following each advisory council meeting. At the other board of directors' meetings, the advisory council's representative(s) will be invited to share information and any updates during the public comment portion of the meeting.

Subsection P: School Closure Plan

In alignment with NACSA and research-based best practices, BCCA will follow the school closure protocol outlined below. This framework is sourced (with modifications) from a sample school closure plan made publicly available by Colorado's Department of Education⁴.

Stage 1: Ongoing and prior to any possible changes in the school's operational status

1. **Develop a School Closure and Student Transition Committee (SCSTC)**. As a preemptive measure, BCCA will develop a School Closure and Student Transition Committee, which will be a subcommittee of the school's board of directors. A member of the board of directors will serve as chairperson of the subcommittee and will consist of another member of the board of directors, two members of the school's administrative team, three parents from the school and, if possible, at least one representative from the LEA. Additionally, the subcommittee will engage with an NC ACCESS Program staff member in an advisory capacity. This committee will meet quarterly as part of an ongoing review to ensure that the necessary processes are in place to support students and their families in the event of a school closure. The subcommittee chair will provide a brief update on the subcommittee's work during regularly scheduled board of directors' meetings.
2. **Develop a Student Transition Plan (STP)**. The SCSTC will develop an STP that must include a plan to provide written notices to parents, schedule multiple informational meetings at varied times so that all parents have an opportunity to attend, provide individualized assistance to parents, and collaborate with the broader educational community in the event of a school closure. The SCSTC must also work diligently to identify and address any barriers to providing transitional support to parents and students (i.e. providing written materials in appropriate home languages and offering meetings at different times of day). Clear deadlines for key reassignment activities must be established within the STP.

⁴Sample Closure Framework. (n.d.). Retrieved March, 15, 2019, from <https://www.cde.state.co.us/sites/default/files/documents/cdechart/downloads/bcsqclosuredocx/docx>

Stage 2: Upon receiving notification of a possible closure

1. **Initiate Communications to Parents and Guardians.** The School Closure and Student Transition Committee will develop a detailed communication protocol in the event a school closure has been approved and is imminent. In alignment with best practices, the communication protocol must include the following:
 - a. The school's status as it relates to when the school may be closed and any plans to appeal the closure decision.
 - b. The school's plan to support students and their families with reassignment in the event an appeal is unsuccessful.
 - c. A way for parents and guardians to contact the board of directors and/or the administrative team to ask any questions about the school closure process.
2. **Inform LEA(s).** BCCA will also include a protocol for informing the LEAs about a potential closure. If the school is able to recruit a representative from the LEA to serve on the School Closure and Student Transition Committee, this representative will serve as the initial contact for the LEA. Generally, the school will develop, as part of the communication plan mentioned above, a letter that can be distributed to the LEAs that will contain the same information as the parent and guardian letter, along with the Student Transition Plan.
3. **Review Budget.** The school will:
 - a. Review the school's budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable.
 - b. Emphasize the legal requirement to limit expenditures to only those in the approved budget, while delaying approved expenditures that might no longer be necessary until a revised budget is approved.
 - c. Ensure that the school continues to collect revenues included in the school's budget, if applicable.
4. **Inform Charter School Faculty and Staff.** Principal and board chair will meet with the faculty and staff to:
 - a.) Discuss reasons for closure, the status of appeals/legal action and likely timeline for a final decision.
 - b.) Emphasize importance of maintaining continuity of instruction through the end of the school year.
 - c.) Discuss plans for helping students find new schools.
 - d.) Identify date when last salary check will be issued, when benefits terminate, and last day of work.
 - e.) Describe assistance, if any, that will be provided to faculty and staff to find new positions.

Stage 3: Closure Approved and Appeals Denied

1. **Send Additional and Final Notifications.** Notify parents and affected school districts in writing after key events (i.e. denial of an appeal) and when the closure decision is final. In the letter to parents after the closure decision is final, include:
 - a.) The last day of instruction.

- b.) Any end-of-the-year activities that are planned to make the transition easier for parents and students.
 - c.) Assistance that will be provided to families in identifying new schools as part of the school's student transition plan.
2. **Notify Employees and Benefit Providers.** Formally notify all employees of termination of employment at least 60 days before closure to include the date of termination of all benefits in accordance with applicable law and regulations. Notify benefit providers of pending termination of all employees, to include:
 - a.) Medical, dental, vision plans.
 - b.) Life insurance.
 - c.) Retirement plans.
 3. **Initiate Financial Closeout Activities.** The school will initiate financial closeout activities, which include:
 - a.) Notify all creditors of the school's impending closure and request a final bill.
 - b.) File required tax returns and reports.
 - c.) Notify the IRS of any changes to address.
 - d.) Notify commercial lenders / bond holders
 - e.) Notify employees and benefit providers
 - f.) Notify funding sources / charitable partners
 - g.) Close out all state and federal grants
 - h.) Prepare final financial statement
 - i.) Complete final financial audit
 - j.) Notify food and transportation services and cancel contracts, if applicable
 4. **Transfer Student Records and Testing Material.** The school will plan for and execute a strategy for sending student records to the receiving schools or the state education agency in accordance with state statutes and/or policies:
 - a.) Individual Education Programs (IEPs) and all records regarding special education and supplemental services.
 - b.) Student health / immunization records.
 - c.) Attendance records.
 - d.) Any testing materials required to be maintained by the school.
 - e.) Student transcripts and report cards.
 - f.) All other student records.
 - g.) Document the transfer of records to include:
 - a. The number of general and special education records transferred.
 - b. Date of transfer.
 - c. Signature and printed name of the charter school representative releasing the records.
 - d. Signature and printed name of the representative who receives the records.

Stage 4: Dissolution

1. **Dissolve the Charter School.**
 - a.) The charter school board adopts a resolution to dissolve that indicates to whom the assets of the non-profit corporation will be distributed after all creditors have been paid.

- b.) Unless otherwise provided in the bylaws, the members (if any) or board votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution, or as determined by statute.
2. **Notify the Secretary of State.** After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth:
 - a.) The name of the non-profit corporation.
 - b.) The address of the non-profit corporation's principal office.
 - c.) The date dissolution was authorized.
 - d.) If dissolution was authorized by the directors, a statement to that effect.
 - e.) If dissolution was approved by the members, a statement of the number of votes cast for the proposal to dissolve.
 - f.) Such additional information as the Secretary of State determines is necessary or appropriate.
3. **Notify IRS.**
 - a.) Notify the IRS of dissolution of the education corporation and its 501(c)(3) status.

V. **BUDGET, BUDGET NARRATIVE AND LOGIC MODEL**

Professional Fees and Contracted Services

- **Mental Health Services Provider (Yr. 1 - \$10,000; Yr. 2 - \$10,000; Project Total - \$20,000)**

Upon award and receipt of grant funds, BCCA will initiate a procurement process through which the school will contract with a mental health services provider that meets all necessary experience and proximity requirements. This allotted amount will result in at least 100 hours per year of support, inclusive of all travel-related expenses. A scope of work for this contracted service is provided in Appendix F2.

- **Instructional Support – Tutoring (Yr. 1 - \$3,600; Yr. 2 - \$3,600; Project Total - \$7,200)**

As an additional layer of support for educationally disadvantaged students and their families, BCCA will contract with a local tutor (individual or company) to provide before/after school and/or Saturday tutoring opportunities. The hourly rate will not exceed \$25/hour, thus meaning that the contractor will provide at least 160 hours of tutoring assistance each year of the project.

- **Implementation Consultant (Yr. 1 - \$16,000; Yr. 2 - \$16,000; Project Total - \$32,000)**

BCCA will contract with ImplementEd, LLC/Craig Tucker to evaluate and support various aspects of the project's implementation and school's opening process. The allotted amount guarantees at least 160 hours of support each year, inclusive of all travel-related expenses. A detailed scope of work is provided in Appendix F3.

- **Professional Development Provider – Topic: School Culture (Yr. 1 - \$9,500; Yr. 2 - \$5,500; Project Total - \$15,000)**

Upon receipt of grant funding, BCCA will contract with Learning for Living/Phil Boyte, a PD service provider that seeks to build positive and productive school culture environments. The projected cost includes registration for six attendees to attend a North Carolina-based Learning for Living School Culture Summit in year one, and two on-site, whole group training sessions

(\$5,500) (one in each year of the project period). A detailed explanation of the training content (non-repeating) and a letter of support are provided in Appendix C1.

- **Professional Development Provider – Topic: Poverty (Yr. 1 - \$5000; Yr. 2 - \$0; Project Total - \$5,000)**

BCCA will work through Aha! Process to contract with a consultant to provide a whole group training on *A Framework for Understanding Poverty*. This includes one on-site training session in the first year of the project period and is inclusive of all travel-related expenses. The estimated amount was obtained through a quote from the organization. A sample agenda and workshop descriptor are provided in Appendices F4 and F5, respectively.

- **Professional Development Provider – Topic: Core Knowledge Curriculum (Yr. 1 - \$5,000; Yr. 2 \$0; Project Total - \$5,000)**

BCCA will contract with a curriculum trainer (TBD) to provide a half-day to full day, whole group session on the Core Knowledge curriculum. This will ensure that the curriculum will be implemented with fidelity and that novice teachers and those who are new to the Core Knowledge curriculum get the critical training they need at the beginning of the academic year. BCCA will contract with a trainer who has significant experience with Core Knowledge curriculum implementation.

- **Professional Development Provider – Topic: NWEA-MAP Assessment (Yr. 1 - \$3,500; Yr. 2 \$3,500; Project Total - \$7,000)**

BCCA will work with NWEA to host a full day, onsite training on the use of the assessment tool and data. This includes one whole group training in each year of the project period. NWEA offers a suite of training sessions from which the school will be able to select the training session/content that is most appropriate and relevant for the school's staff. As part of an effort to increase collaboration between BCCA and the LEA, representatives from the LEA will be invited to attend this training. The listed amount was obtained through a quote provided by the organization.

- **Professional Development – Kenan Fellows Program for Teacher Leadership (Yr. 1 - \$29,200; Yr. 2 - \$29,200; Project Total - \$58,400)**

Through a unique partnership with the Kenan Fellows Program for Teacher Leadership at NC State University, BCCA will sponsor two teachers per year (4 over the project period) to participate in a one-year fellowship program. The cost per teacher (\$14,600) includes all fellowship related costs (i.e. lodging and meals at KFP professional development events, etc.) as well as a \$5,000 stipend paid by NC State University to support the teachers' time and effort in the program. This amount includes all of the support that the Kenan Fellows Program provides, including the development and coordination of a three-week summer internship experience with an industry and/or research organization in the teacher's local community and curriculum development guidance. The listed amount was obtained through a quote provided by the organization.

- **Audit Services (Yr. 1 - \$0; Yr. 2 – \$8,000; Project Total - \$8,000)**

To ensure the financial health of the school, BCCA will contract with a local provider to conduct an audit. The designated amount is based on estimates provided to the school during the charter application process.

Travel, Conferences and Meetings

- **Professional Development Conference – NCDPI EC Conference (Yr. 1 - \$1,100; Yr. 2 - \$1,100; Project Total - \$2,200)**

As part of the school's commitment to serve educationally disadvantaged students, including those with disabilities, BCCA will commit to sending two faculty members to NCDPI's annual EC Conference each year of the grant (fall). The listed amounts only reflect the registration costs (estimated at \$250/person based on last year's registration fee). As it pertains to travel, yearly amounts assume \$400 in lodging expenses each year (\$100/night x 2 nights x 2 attendees) with the remaining amount allocated for any mileage and/or food reimbursements, which will be processed according to state per diem rates.

- **Professional Development Travel - Kenan Fellows Program for Teacher Leadership (Yr. 1 - \$550; Yr. 2 - \$550; Project Total - \$1,100)**

The estimated amounts cover any mileage to and from fellowship-related events and any meals not covered by the fellowship program. Additionally, the amounts also help cover any travel-related costs related to the fellowship expectation to present on their fellowship experience at the Office of Charter School's Charter School Leadership Institute or a similar NC-based conference. The projected amounts assume \$400 in lodging expenses (\$100/night) with the remaining amount allocated for any mileage and/or food reimbursements, which will be processed in accordance with state per diem rates.

- **Professional Development Conference – NC ACCESS Fellowship Program Participation and Dissemination Requirement (Yr. 1 - \$500; Yr. 2 - \$1,500; Project Total - \$2,000)**

In an effort to meet the expectations of the NC ACCESS Program, BCCA has allocated funds for the following:

1. Mileage, meals and/or lodging reimbursements related to attendance at NC ACCESS Fellowship Activities (year 1).
2. To fulfill the NC ACCESS Program's expectation that fellows disseminate best practices through attendance at a conference, BCCA has budgeted funds in the second year to allow fellowship participants to attend and present at two conferences, including the Office of Charter School's annual Charter School Leadership Institute and a state or regional conference (TBD). This assumes registration costs of \$50/person for the Charter School Leadership Institute and \$200/person for a state or regional conference.
3. BCCA will also allocate \$1,400 in travel-related expenses to support presentations at the Charter School Leadership Institute and an additional state or regional conference. This amount assumes \$600 in lodging expenses (\$100/night) with the remaining amount allocated for any mileage and/or food reimbursements, which will be processed according to state per diem rates.

- **Professional Development – Visit In-State High Performing Charter Schools (Yr. 1 - \$1,000; Yr. 2 - \$1,000; Project Total - \$2,000)**

The defined amounts will be used to support representatives from the school to visit in-state high performing charter schools. Because the schools to be visited and number of participants is still to be determined, the estimated cost assumes \$500 in lodging expenses (\$100/night) with the remaining amount allocated for mileage and/or food reimbursements, which will be processed according to state per diem rates.

Supplies and Materials

- **General Classroom Consumables (Yr. 1 - \$2,500; Yr. 2 - \$2,500; Project Total - \$5,000)**

The school will utilize this line item to purchase general, allowable classroom consumables, including, but not limited to, pencils, pens, non-scientific calculators and printer paper. Classroom consumables will be purchased quarterly and will be included on an itemized list and sent to NC ACCESS Program staff for approval before purchases are made.

- **Math Manipulatives (Yr. 1 - \$11,000; Yr. 2 - \$3,000; Project Total - \$14,000)**

In support of the school's math instruction, the school will purchase kits containing math manipulatives for each classroom. The cost was estimated based on the rates published on Didax's website, an official partner of Eureka Math. In the event a discount changes the price per unit, BCCA will use any remaining funds to buy curriculum items that may not be provided in the grade level kit. The amount beyond the actual cost of the kits will be used for shipping-related costs. A detailed breakdown of this line item, including quantities and prices per unit, is provided in Appendix F7.

- **Core Knowledge Curriculum Kits (Yr. 1 - \$22,500; Yr. 2 - \$0; Project Total - \$22,500)**

To support teachers and ensure that the school's selected curriculum is implemented with fidelity, the school will purchase Core Knowledge Language Arts (CKLA) kits from Amplify, which serves as the Core Knowledge Foundation's recommended provider for CKLA kits. The kits include supporting materials for both the "skills" and "listening and learning" strands. The kits are intended for individual classrooms; however, one grade level kit will be shared across multiple classrooms. The cost was estimated based on the rates published on Amplify's website. In the event a discount changes the price per unit, the school will use any remaining funds to buy curriculum items that may not be provided in the grade level kit. The remaining amount beyond the real cost of the kits will be used for shipping-related costs. A detailed breakdown of this line item, including quantities and prices per unit, is provided in Appendix F7.

- **Classroom/Library Books (Yr. 1 - \$4,000; Yr. 2 - \$4,000; Project Total - \$8,000)**

At least 400 books will be purchased in each year of the grant. The purchased books will be incorporated into individual classrooms and/or made available in a centralized library space. The estimated cost assumes an average of \$10.00 per book.

Technology and Equipment

- **Central-Use Printer (Yr. 1 - \$3,000; Yr. 2 - \$0; Project Total - \$3,000)**

A central-use printer will be purchased to support the work of administrators and staff. The estimated amount includes the cost of the printer, shipping-related costs and/or applicable setup fees. A sample item is included in Appendix F7.

- **Classroom Furniture (Yr. 1 - \$6,000; Yr. 2 - \$3,500; Project Total - \$9,500)**

Furniture is a critical necessity when starting a new school. As such, BCCA will leverage subgrant funds to purchase classroom furniture. Though it is difficult to predict the exact items and quantities, since those details will have to be determined on a class-by-class basis, the items purchased with these funds may include desks, chairs, tables, bookshelves and similar items. The administration will work in concert with the school staff to determine class-by-class furniture needs. No unusual or high-priced items will be purchased. An itemized list of classroom furniture needs will be submitted to NC ACCESS Program staff for approval prior to purchasing.

Other

- **Postage and Envelopes (Yr. 1 - \$800; Yr. 2 - \$800; Project Total - \$1,600)**

The budgeted amount is based on an estimated 1,600 pieces of mailed correspondence each year (47 cents for postage + 3 cents per envelope = 50 cents per mailed correspondence).

- **Outreach Consultant (Yr. 1 - \$9,000; Yr. 2 - \$9,000; Project Total - \$18,000)**

In order to fulfill BCCA's aggressive marketing and recruiting plan, BCCA will contract with a qualified outreach consultant. Upon receipt of grant funds, BCCA will initiate a procurement process to identify a local provider with the necessary experience required to reach the target

community, including the ability to provide or subcontract for translation services. The outreach consultant must provide at least 90 hours of support per year. A detailed scope of work is provided in Appendix F6.

- **Marketing Materials (Yr. 1 - \$3,000; Yr. 2 - \$500; Project Total - \$3,500)**

As part of the outreach plan, BCCA plans to develop new and targeted marketing materials (flyers, brochures, etc.), as well as potentially purchasing temporary signage and newspaper/radio ads. The estimated price also assumes graphic design fees (estimated at no more than \$60/hour), and any required printer setup fees.

NC ACCESS PROGRAM SUBGRANT BUDGET

Directions for completing this workbook are found on tab 1a-Instructions.

Name of Charter School: **TeamCFA: Bonnie Cone Classical Academy**
 Authorizer Name: **North Carolina State Board of Education**

Select Subgrant Award Type: **Implementation Only**
 Subgrant Award Amount: **\$ 250,000.00**
 Date: **March 29, 2019**

Name of person completing this report:

Name: **Gregg Sindors**
 Phone: **(812) 599-6530**
 E-mail: **gsindors@teamcfa.org**

Name of person to be contacted regarding budget questions:

Name: **Gregg Sindors**
 Phone: **(812) 599-6530**
 E-mail: **gsindors@teamcfa.org**

Program Contact: For all application, budget, or other program-related questions contact the NC ACCESS team at:
 (919) 807-3491 or NCACCESS@dpi.nc.gov

Funding Request

Cost Category	Planning Year	Year 1 Implementation	Year 2 Implementation	Year 3 Implementation	Year 4 Implementation	Year 5 Implementation
Instructional Program	\$ -	\$ 49,600.00	\$ 16,600.00	\$ -	\$ -	\$ -
Support Program	\$ -	\$ 97,150.00	\$ 86,650.00	\$ -	\$ -	\$ -
Total:	\$ -	\$ 146,750.00	\$ 103,250.00	\$ -	\$ -	\$ -

Revised Januray 2019

**NC ACCESS PROGRAM SUBGRANT BUDGET
Budget Request Summary**

Applicant Name:	TeamCFA: Bonnie Cone Classical Academy						
Subgrant Type:	Implementation Only						
Budget Category	Planning Year	Year 1 Implementation	Year 2 Implementation	Year 3 Implementation	Year 4 Implementation	Year 5 Implementation*	Total
INSTRUCTIONAL PROGRAM							
Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Employee Provided Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Fees and Contracted Services	\$ -	\$ 3,600.00	\$ 3,600.00	\$ -	\$ -	\$ -	\$ 7,200.00
Supplies and Materials	\$ -	\$ 40,000.00	\$ 9,500.00	\$ -	\$ -	\$ -	\$ 49,500.00
Technology and Equipment	\$ -	\$ 6,000.00	\$ 3,500.00	\$ -	\$ -	\$ -	\$ 9,500.00
Travel, Conferences, and Meetings	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Instructional Program	\$ -	\$ 49,600.00	\$ 16,600.00	\$ -	\$ -	\$ -	\$ 66,200.00
SUPPORT PROGRAM							
Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Employee Provided Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Fees and Contracted Services	\$ -	\$ 78,200.00	\$ 72,200.00	\$ -	\$ -	\$ -	\$ 150,400.00
Supplies and Materials	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology and Equipment	\$ -	\$ 3,000.00	\$ -	\$ -	\$ -	\$ -	\$ 3,000.00
Travel, Conferences, and Meetings	\$ -	\$ 3,150.00	\$ 4,150.00	\$ -	\$ -	\$ -	\$ 7,300.00
Other	\$ -	\$ 12,800.00	\$ 10,300.00	\$ -	\$ -	\$ -	\$ 23,100.00
Subtotal Support Program	\$ -	\$ 97,150.00	\$ 86,650.00	\$ -	\$ -	\$ -	\$ 183,800.00
Grand Total	\$ -	\$ 146,750.00	\$ 103,250.00	\$ -	\$ -	\$ -	\$ 250,000.00

*If applicable. Total grant periods cannot exceed sixty (60) months, including the planning year.

Objectives

Objective 1: Educationally disadvantaged students attending BCCA will outperform their counterparts in the same subgroups in the LEA on the 4th grade End-of-Grade math and reading assessments by at least 10% in the first year and 15% in the second year of the project period.

Objective 2: By August 2021, using economically disadvantaged students as a proxy, educationally disadvantaged students will represent at least 30% of the total student enrollment at BCCA.

Objective 3: Each year of the project period, BCCA will endeavor to build productive relationships with the LEA and other charter schools to share best practices in serving educationally disadvantaged students through the planning and implementation of quarterly “collaboration roundtables” with at least two LEA representatives and four charter schools.

Inputs	Outputs		Outcomes and Impact		
	Activities	Participation	Short	Medium	Long
- Time and commitment from Administration, Staff, Board of Directors (BOD), CMO and consultants. -Subgrant funds -Strategically designed plan to more effectively recruit and serve a greater number of educationally disadvantaged students and their families, including innovative and integrated strategies.	1. Market to and recruit ED students and families. 2. Build staff capacity through PD. 3. Develop and improve support services to more effectively serve ED students, including a summer extended learning program and before/afterschool/ Saturday tutoring. 4. Build collaborative relationships with other charter and traditional public schools.	1. Administration, BOD, Staff, CMO, Outreach Consultant 2. Administration, Staff, PD providers, Implementation Consultant 3. Administration, staff, PD providers, Implementation Consultant, Mental Health Consultant 4. Administration, BOD, staff, CMO	-Increased number of ED families attending information sessions/requesting information. -Staff equipped to serve and support ED students. -Development of critical support services/resources. -Increased awareness of support services among stakeholders. -Regular meetings (formal and informal) with charter school and LEA(s) representatives.	-Increased number of ED students and families submitting applications. -Demonstrated classroom proficiency in teaching ED students. -Increased participation in support services among ED students and families. -Established collaborative network through which best practices can be shared.	-Significant increase in the number of ED students enrolled in the school. -ED student performance that exceeds the LEA. -Close to full participation in support services among ED students. -Expanded network of charters schools and LEA(s) committed to effectively serving ED students and their families.

Assumptions

Interest from LEA(s) and other charter schools to participate in regular meetings.

Staff buy-in (addressed through PD).

Increased marketing and awareness leads to increased enrollment.

External Factors

Changes in ED student performance in the LEA(s).

Changes in residential development in the areas targeted through the proposed outreach plan.

Changes in legislative or policy directives related to ED students.

VI. COMPETITIVE PREFERENCE STANDARDS

2. *Increasing the racial and ethnic diversity in their new, expanded, or replicated school.* (see Appendix D1).

VII. PRIORITY CONSIDERATION STATUS

N/A

APPENDIX A

CMO/EMO

Appendix A1

No previous data available

TeamCFA was recently designated a CMO. Prior to this designation, TeamCFA supported affiliate schools, but those schools did not open with and do not currently operate under a CMO contract. The performance of affiliate schools does not reflect or represent TeamCFA's capacity as a CMO. Moving forward, the following schools will operate under a CMO contract: TeamCFA: Pender; TeamCFA: Community Public Charter; and TeamCFA: Bonnie Cone Classical Academy.

APPENDIX B

Financial Audits

Appendix B1

N/A

APPENDIX C

Contractual Agreements with Partner Organizations
Partnership Letters

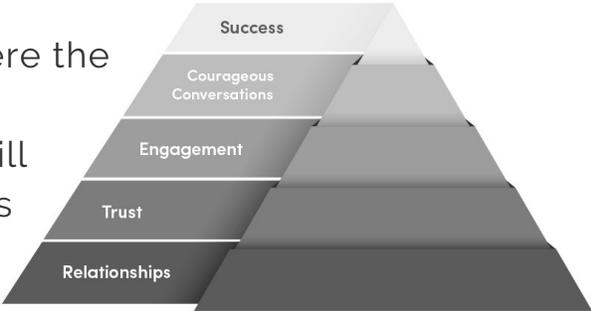
SCHOOL CULTURE PROPOSAL

Are you a school leader looking to create a school no one will want to leave? A school where your staff is healthy and your students can't wait to show up each day?

Here at Learning for Living we understand how important it is that students and staff are successful academically and relationally. Our goal is to work with your team to share a culture design process where we EDUCATE leaders on a step by step road map for building thriving school culture, EQUIP them with the tools they need to take each step, and EMPOWER them to design the school where everyone can say; I belong here, I am safe here, and I can grow here.

Our Core Philosophy:

The work we do is based on our Culture Pyramid, where the base is relationships. We believe if staff is given time to get to know each other on the human level, they will begin to trust one another. Trust leads to higher levels of engagement, the ability to have courageous conversations, and ultimately success in helping students reach their full potential.



Learning for Living is excited to work alongside the school as part of their participation in the NC ACCESS subgrant program to help cultivate a positive and productive school culture that serves all students.

In the attached page, we recommend programs that will accelerate the work staff is doing to ensure their educationally disadvantaged students are taken care of both from a social and academic perspective.



CULTURE PLAN

YEAR ONE:

1

TWO DAY CULTURE SUMMIT FOR 6 STAFF MEMBERS:

The school would send a team of 6 staff members, including one administrator, to attend a two-day School Culture Summit. The Summit would be in North Carolina close to the proximity of the school. Topics to include: Who and what drives school culture, culture levers to build strong staff and student culture, and time to build an action plan for the specific school needs. Fee to include registration and lunch each day.

Fee: \$4,000

2

SCHOOL CULTURE PROFESSIONAL DEVELOPMENT: MODULE ONE

A Learning for Living presenter will facilitate a 4-6 hour workshop to include administration, teachers and support staff focused on culture and connections. Module One has a primary focus on building trust through relationships. Outcomes of Module One to include staff more willing for collaboration, more interested in learning through observation, and a higher level of trust in the adult community.

Fee: \$5,500

Price for year one: \$9,500

YEAR TWO:

3

SCHOOL CULTURE PROFESSIONAL DEVELOPMENT: MODULE TWO

A Learning for Living presenter will facilitate a 4-6 hour workshop to include administration, teachers and support staff focused on culture and connections, Module Two has a primary focus on increased engagement among the staff. The outcomes will be a greater interest in working toward higher levels of engagement between staff, a higher level of engagement between students and staff, and a greater interest in learning from student voice.

Fee: \$5,500

Price for year two: \$5,500 inclusive



What clients are saying

"In 30 years of teaching, I have NEVER enjoyed the company of my colleagues more than I did yesterday! I have never seen administrators prioritize the relationships between colleagues at the center of the "first-day-back-at-school-meeting." I loved it! I got to listen to people with whom I have NEVER had a conversation. I walked out of that experience even more proud to be affiliated with this school. Did you notice that people did NOT hover their I-phones?! Even with all the "To Do" lists that people have in their heads at this time of year, people actually stopped "multi-tasking" for the entire morning? People were really present. Wow! Thank you, Admin! I needed that morning more than I knew."

- Teacher at Monte Vista High School, California

"Phil Boyte has worked with our faculty several times in the past few years and with each visit, the impact increases. Since we began our work with Phil, we have been able to build a stronger school culture by taking what we learned in his visits and apply them in ways where we can have those tough staff-wide conversations and hear veteran teachers say "that was the best conversation we have had as a staff in years" on their way out. Experiences like this remind me of that we are building a strong culture and it doesn't happen overnight. Phil told me when we started it would be a 3-5 year process to build a great culture and I feel we are on our way."

- Principal, Palo Alto, California

"The most real, relevant, and impactful training an administrator can attend because all success begins with relationships!"

- Assistant Principal, Bentonville, Arkansas

"I want to thank you for presenting and creating a fun and interactive professional development day for the Eureka Union School District. Our staff left the room feeling energized for the start of the school year, while they were also appreciative to walk away with a variety of teaching strategies that you modeled. The reflective activities generated a deeper understanding of the impact that we, as educators, have on our students and the contribution that we offer to a school's culture. The day was a complete success. We received so much positive feedback verbally and from our evaluations."

- Superintendent, Eureka Union School District, California





March 15, 2019

To Whom it May Concern:

As Director of the *Kenan Fellows Program for Teacher Leadership* (KFP) I am writing in support of *TeamCFA: Bonnie Cone Classical Academy* regarding submission of its grant proposal to the NC ACCESS Program.

The KFP recognizes the critical need to develop and empower excellent teachers who understand how to make learning more authentic and meaningful for students. Founded in 2000 by NCSU's Kenan Institute for Engineering, Technology and Science, the KFP has built a statewide Network of more than 450 teacher leaders who are dedicated to supporting the growth of their peers in the profession and ensuring that all students have high-quality teachers. As their leadership skills grow, Fellows pro-actively lead within their content area teams, their schools, and their districts. Many become empowered to influence and lead educational innovation. Teachers who complete the fellowship program say they feel a deeper connection to their community and grow professionally as part of this statewide network of teacher leaders.

During the grant period, the KFP will collaborate with partners at *Bonnie Cone Classical Academy* to identify four teachers among their staff who qualify for a Kenan Fellowship (two per year). Teachers who are selected will participate in the year-long Fellowship experience, which includes 80 hours of professional development, a three-week internship with an organization that specializes in serving disadvantaged youth and their families, and personal coaching as they transfer what they have learned into the development of engaging, integrated STEM curricula for their students. The KFP's proprietary professional development program focuses on instructional leadership, elevating teacher voice, strengthening ties between the school and the local community, peer coaching and mentoring, and growing professional learning networks.

KFP staff will continue to work with the Fellows as they pilot their strategies during the school year and further implement them in a summer program that is designed to prevent summer learning loss. The teachers selected for Fellowships will become closely connected with the 25-30 public school teachers from across the state who will comprise their KFP cohort and, in addition, will have access to the 450+ alumni in the Kenan Fellows Network. This will provide a rich environment for collaboration between North Carolina's charter teachers and traditional public-school teachers.

Sincerely,

A handwritten signature in black ink that reads "Elaine Franklin". The signature is written in a cursive, flowing style.

Elaine Franklin, Ph.D.

Director



March 21, 2019

To whom it may concern,

This letter is to confirm and express my enthusiasm for the role of Implementation Consultant on your innovative NC Advancing Charter Collaboration and Excellence for Student Success (ACCESS) proposal. As the Manager of ImplementEd, LLC, I am very excited about the opportunity to work with you and the other members of the TeamCFA: Bonnie Cone Classical Academy team.

As its name implies, ImplementEd is focused on taking education-related ideas, especially those that are innovative and potentially complex, to effective implementation. I am truly excited to contribute to this project as it is both innovative and multifaceted, and it has the potential to have a profound and sustained impact on the school. This project, both its components and focus, aligns perfectly with the mission of ImplementEd, LLC.

I believe that the timing and intent of this subgrant opportunity is critically important given the importance of developing strategies to serve all students, especially those who are educationally disadvantaged. I anticipate that the proposed strategies will increase awareness of and provide educationally disadvantaged students with the support structures they need to succeed.

Sincerely

A handwritten signature in black ink, appearing to read "Craig Tucker".

Craig Tucker
Manager
ImplementEd, LLC

Appendix C4



March 21, 2019

Bonnie Cone Classical Academy
Board of Directors

To Whom it May Concern,

As the Chairman of the Board of Directors for Bonnie Cone Classical Academy, I want to convey our interest in and support of our school's application for the North Carolina ACCESS Grant. We are committed to providing an engaging and rigorous academic learning environment for all children. Parents should have a choice in their children's education, and we are striving to remove the barriers that may exist for underrepresented, educationally disadvantaged children. Not only are we providing transportation and meal options for our students, but we are committed to supporting student learning through the Classical Education model, and through hands-on project-based instruction. Such instruction does require that all students have access to the use of supplementary learning manipulatives and materials which will be made possible through this grant. In addition, an essential component is our ability to equip our teachers with the necessary tools to address the social and emotional, as well as the academic development of all children. This will be accomplished through extensive professional development, also made possible through the grant funds.

Our goal at Bonnie Cone Classical Academy is to inspire each student to think critically, communicate effectively and achieve academic excellence by providing academic choice. We seek to align the natural developmental abilities of a child to produce intelligent, literate, curious young adults who are able to think, solve problems, and follow through on a wide range of interests. The NC Access Grant will afford us the ability to offer this to all students.

Respectfully,

A handwritten signature in cursive script that reads "Marty McCarthy".

Marty McCarthy, Board Chairman
Bonnie Cone Classical Academy



TeamCFA

March 29, 2019

Mr. Dave Machado
Executive Director
Office of Charter Schools
North Carolina Department of Public Instruction
301 North Wilmington Street
6302 Mail Service Center
Raleigh, NC 27699-6302

Dear Mr. Machado,

The Board of Directors of TeamCFA: Bonnie Cone Classical Academy has contracted with TeamCFA to serve as the non-profit Charter Management Organization for the school. We are in support of the school's NC ACCESS grant application.

The grant aligns with one of the cornerstones of our organization that all parents; regardless of income, race or street address; deserve the right to choose the best education setting for their scholars. This grant will ensure that the school intentionally recruits and serves educationally disadvantaged students. We are excited about the participation in the fellowship program and the partnership described in the grant with the Kenan Fellows program to develop teacher leaders for a supplemental summer program that will curb summer learning loss of educationally disadvantaged scholars. We have committed to fund this program after the grant cycle. We will also facilitate the sharing of best practices with other public charter schools and traditional public schools.

Sincerely,

A handwritten signature in black ink that reads "Anthony Helton". The signature is written in a cursive, flowing style.

Anthony Helton
CEO

MANAGEMENT SERVICES AGREEMENT

This **MANAGEMENT SERVICES AGREEMENT** (this “Agreement”) is made and entered into as of (Month) __, (Year), by and between TeamCFA Foundation, an Oregon nonprofit corporation (“TeamCFA”), and Bonnie Cone Classical Academy, Inc. a North Carolina nonprofit corporation (the “School”).

WITNESSETH:

WHEREAS, School is a public charter school operating under a charter with the North Carolina State Board of Education; and

WHEREAS, TeamCFA is in the business of providing professional educational and management services to public and charter schools; and

WHEREAS, School’s board of directors (“Board”) wishes to hire TeamCFA, and TeamCFA wishes to be hired by School, to manage and operate School upon the terms and conditions set forth herein;

NOW, THEREFORE, in consideration of the premises, and of the covenants and obligations set forth herein, and for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

ARTICLE I CONTRACTING RELATIONSHIP

A. Authority. School represents that it holds a Charter from the North Carolina State Board of Education (“SBE”). TeamCFA will assist School in preparing charter amendment requests to permit School to contract with TeamCFA and for TeamCFA to provide educational management services to School. The Board is required by all applicable authorities in the State of North Carolina to supervise and control the business and operations of School, and is invested with all powers necessary or desirable for carrying out the educational program contemplated in this Agreement.

B. Agreement. Subject to approval by the SBE, School hereby contracts with TeamCFA, to the extent permitted by law, for the provision of all management labor and supervision necessary for the provision of educational services to students, and the management, operation and maintenance of School in accordance with the educational goals, curriculum, methods of pupil assessment, admissions policy and criteria, school calendar and school day schedule, age and grade range of pupils to be enrolled, educational goals, and method to be used to monitor compliance with performance of targeted educational outcomes, all as adopted by the Board and as included in the Charter . TeamCFA’s obligations to School shall be only as expressly set forth in this Agreement. Duties required to be carried out for the operation of School which are not expressly set forth herein as being TeamCFA’s responsibility shall remain the Board’s sole responsibility.

C. Designation of Agents. TeamCFA will recommend for Board approval of the Head of School. The Head of School will become an employee of TeamCFA whose sole responsibility as such will be to act as the CEO of School. Pending employment of the Head of School, The Board designates TeamCFA’s CEO, and other employees of TeamCFA as he shall use in connection with rendering services to School of TeamCFA, as agents of School solely for the purpose of having a legitimate educational interest entitling them to have access to educational records under U.S.C. §1232g, the Family Rights and Privacy Act (“FERPA”), and other applicable laws. Pending employment of Head of School, the Board hereby authorizes TeamCFA to communicate with and negotiate on the Board’s behalf with all state and governmental agencies, such negotiations and communications by TeamCFA to be as directed by the Board and subject to the Board’s final authority to approve any action to be taken by or on behalf of School.

D. Status of the Parties. TeamCFA is an North Carolina nonprofit corporation, is independent from School, and is not a division, part or affiliate of School. School is a North Carolina nonprofit corporation authorized by its corporate documents to execute and deliver this Agreement and perform its obligations hereunder. School is not a division or part of TeamCFA. The parties to this Agreement intend that the relationship created by this Agreement is that of an independent contractor and not employer-employee. Except as expressly provided in Article 1(C) above, no agent or employee of TeamCFA, shall be deemed to be the agent or employee of School. TeamCFA shall be solely responsible for its acts and the acts of its agents, employees and subcontractors. The relationship between TeamCFA and School is based solely on the terms of this Agreement, and the terms of any other written agreements between TeamCFA and School.

**ARTICLE II
TERM**

The term of this Agreement shall be from August 1, 2018 to June 30, 2024 (the “initial term”), unless terminated or cancelled earlier as provided for hereinafter in **Article VII**, below.

**ARTICLE III
OBLIGATIONS OF TEAMCFA**

A. Responsibility. TeamCFA, through the Head of School, shall be responsible and accountable to the Board for the administration, operation and performance of School in accordance with its charter and its mission. TeamCFA shall consult with and advise the Board with respect to all aspects of School’s operations, including but not limited to finances, staffing, scheduling, curriculum/instruction, assessment, data analysis, technology, compensation and incentives, transportation, and facilities. All activities, duties, and responsibilities of TeamCFA under this Agreement shall be conducted under the Head of School. The Head of School will be an employee of TeamCFA. However, it is understood and agreed that, to the extent required by law, the Board shall be the final authority as to matters related to the operation of School, including but not limited to finances, staffing, scheduling, curriculum/instruction, assessment, data analysis, technology, compensation and incentives, transportation and facilities. TeamCFA’s responsibility is expressly limited by: (i) School’s Annual Budget which is to be

submitted and approved by the Board as provided in this Agreement, and (ii) the availability of funding to pay for said services. Neither TeamCFA nor School shall be required to expend School funds on services in excess of the amount set forth in School's Annual Budget. In the event of the resignation or dismissal of the Head of School, TeamCFA will continue to meet its obligations in the manner contemplated by paragraph I.C pending the selection and employment of a new Head of School.

B. Educational Program. TeamCFA shall evaluate School's current program of instruction (the "Educational Program") and recommend to the Board an educational program to achieve superior academic performance by introducing national best practices in instruction. As TeamCFA determines that it is necessary to modify the Educational Program, TeamCFA shall inform the Board of the proposed changes and obtain Board approval and, where necessary, approval of state regulators before implementing modifications to the Educational Program. Not less than annually, and otherwise as requested by the Board, TeamCFA will provide the Board with updated reports on progress towards implementing School's educational goals in the Educational Program.

C. Specific Functions. Subject to the Board being the final authority as to matters related to the operation of School, TeamCFA shall be responsible for the management, operation, administration, accounting and Educational Program at School on a day-to-day basis. Such functions of TeamCFA shall include:

1. Develop and supervise all of the key components of the school design, including staffing, scheduling, curriculum/instruction, assessment, data analysis, technology, compensation and incentives, transportation, and facilities.
2. Provide staff support to the board of directors, including setting annual budget and performance goals, proposing school policies for board approval, strategic planning, board meetings and agendas, reports of financial and academic performance, involving the board in hiring of staff and other issues.
3. Supervise the annual budget, monitor and manage monthly expenses to ensure they are within budget.
4. Recruit staff as needed and provide leadership, supervision and support to principals and operations managers, including assisting/supporting them in hiring, evaluating and compensating teachers and other staff and ensuring school policies are implemented consistently and fairly.
5. Provide professional development training for school employees during the summer prior to the start of school and continuing throughout the school year as necessary.
6. Provide office services, including but not limited to accounting, payroll, human resources, billing, and securing an auditor.

7. Develop and execute fundraising opportunities, including applications for federal and private grants.
8. Work with the Department of Public Instruction, State board and other agencies as necessary, including compliance with reporting requirements and any other general inquiries received from these agencies.
9. Work with principals and staff to supervise parent involvement, including strategies to communicate with and engage parents and conduct annual satisfaction surveys.
10. Develop and implement marketing to maximize student enrollment and retention.
11. Develop public relations strategies and work with staff to build awareness and relationships in the community, particularly with local businesses and leaders.
12. Manage the federal programs budget on behalf of School, including collecting funds, supervising the allocation of Special Education and Title I dollars based on the needs of the school, students, and applicable law and regulations.
13. To the extent permitted by law and in compliance with all applicable laws, regulations and rules, advocate with and, if necessary, lobby state and local elected officials to support policies affecting the school, its future and charter schools in general.
14. Work with legal counsel, financial institutions and other third parties as necessary to conduct the school's business.
15. Conduct research and development for improvement and innovation.
16. Prepare reports required by law and/or requested by the Board and comply with all applicable reporting requirements established by law or regulation.
17. Any other functions necessary or expedient for the administration of School.
18. If a vacancy occurs in the position of School Director, TeamCFA will advertise, interview and present a candidate to the School's Board of Directors for their review and approval.

D. Purchases. Purchases made by TeamCFA on behalf of School with School's funds, such as non-proprietary instructional or curriculum materials, books and supplies, and equipment, will be the property of School. School will own all proprietary rights to curriculum or educational materials that are both directly developed and paid for by School.

E. Proprietary Materials. TeamCFA's educational materials and teaching techniques used by or at School shall be subject to disclosure to the extent required by law.

TeamCFA shall own all proprietary rights to, and School's proprietary interests shall not include, curriculum or educational materials that are developed or copyrighted or similarly protected by TeamCFA, provided the curriculum or educational materials are developed by TeamCFA with no funds from School. TeamCFA shall grant School a non-exclusive license to use any such curriculum or educational materials developed or copyrighted or similarly protected by TeamCFA for the School during the term of this contract or any substitution or renewal thereof. TeamCFA shall own, and School shall not have any claim to, any items of personal property leased or purchased by TeamCFA with its own funds.

F. Subcontracts. TeamCFA shall not subcontract the management, oversight or operation of the teaching and instructional program and transportation and food service programs, except as specifically permitted in this Agreement, and then only after first receiving the express approval of a majority of the Board.

G. Place of performance. TeamCFA reserves the right to perform functions other than instruction, such as purchasing, professional development, and administrative functions, off-site, unless prohibited by state or local law; provided that any School expenses relating to offsite professional development must be within the approved Annual Budget or otherwise approved by the Board.

H. Student Recruitment. TeamCFA and the Board shall be jointly responsible for the recruitment of students. Students shall be selected in compliance with applicable laws. TeamCFA shall solicit and recruit enrollment of students by various means, which may include but shall not be limited to the following: paid and unpaid media advertisements in newspapers of general circulation; mailings to parents or guardians of prospective students; word-of-mouth; and presentations to interested groups.

I. Due Process Hearings. The Board shall provide student due process hearings in conformity with the requirements of state and federal law regarding discipline, special education, confidentiality and access to records, to an extent consistent with School's own obligations. School shall retain the right to provide due process as required by law.

J. Legal Requirements. TeamCFA shall use commercially reasonable efforts to provide educational programs and perform all duties required of TeamCFA pursuant to this contract in a manner that is in full compliance with and that meets all applicable federal, state, and local laws, rules, regulations and requirements. TeamCFA shall also use commercially reasonable efforts to rectify any failure to comply with such laws, rules, regulations and requirements.

K. Rules and Procedures. TeamCFA shall recommend reasonable rules, regulations and procedures applicable to School, and is authorized and directed to enforce such rules, regulations and procedures adopted by a majority vote of the Board on behalf of School.

L. School Year and School Day. The school year and the school day shall be as required by law and as determined annually by the Board..

M. Performance Standards and Measurement. TeamCFA shall perform its duties and responsibilities as set forth in this Agreement to the reasonable satisfaction of the Board. TeamCFA shall implement performance standards and measures that permit evaluation of the education progress of each student in School, and the financial performance of School, on an annual and interim basis as agreed with the Board.

TeamCFA shall use reasonable efforts to ensure that School and the students of School (the “Enrolled Students”) meet or exceed all performance criteria set by the Board. TeamCFA will recommend annual performance goals to the Board for approval. TeamCFA will make reasonable efforts to ensure that each individual Enrolled Student’s score, and Enrolled Students’ scores in the aggregate for each grade level at School, increases from year to year in accordance with the performance criteria.

Specific measures of student and school performance and progress will include:

1. Value-added growth in student achievement
2. Overall achievement scores
3. Progress in student achievement
4. 4-year graduation rate
5. 4-year college placements
6. Customer satisfaction (parents & students)
7. Student enrollment and retention
8. Financial performance and efficiency ratios

TeamCFA will ensure all standardized tests that are required by applicable law are administered to students of School.

N. Services to Disabled Students and Special Education. TeamCFA shall provide special education services to students who attend School in conformity with the requirements of state and federal law. TeamCFA may recommend that the School subcontract as necessary and appropriate for the provision of services to students whose special needs cannot be met within School’s program, subject to approval of the Board. Such services shall be provided in a manner that complies with local, state and federal laws and applicable regulations and policies. Consistent herewith, the Board acknowledges the individualized nature of services that may need to be provided to disabled and special needs students and the impact that the provision of such individualized services may have on the Annual Budget. The Board and TeamCFA mutually agree to adjust the Annual Budget as deemed necessary with respect to the provision of services to disabled and special needs students under this paragraph, as required by law.

O. Unusual Events. TeamCFA agrees to timely notify the Board of any anticipated or known: (i) material health or safety issues, (ii) labor, employee or funding problems, (iii) actual or threatened civil litigation, administrative agency proceedings or other legal proceedings, or (iv) problems of any other type that could adversely affect School in complying with its responsibilities hereunder.

P. Student and Financial Records. As required and permitted by applicable federal and state laws and applicable regulations, all student and financial information related to School shall be available for inspection at the School during normal business hours on reasonable notice.

Q. School Records and Property. The financial, educational and student records pertaining to School are School's property, and such records are subject to the provisions of the applicable freedom of information act(s) to the extent required by applicable law. Except as prohibited under applicable law, the public shall have access to School's records.

ARTICLE IV OBLIGATIONS OF THE BOARD

A. Business Judgment Obligation. The Board shall be responsible for its fiscal and academic policy. The Board shall exercise its business judgment in considering the recommendations of TeamCFA, including but not limited to, TeamCFA's recommendations concerning policies, rules, regulations and budgets.

B. Assistance to TeamCFA. The Board shall cooperate with TeamCFA in furnishing all information and submitting all forms and reports required by this Agreement. The Board will provide timely notice of its Meetings in accordance with North Carolina's Open Meetings Law. The Board shall timely furnish TeamCFA all documents and records necessary for TeamCFA to properly perform its responsibilities under this Agreement.

C. Unusual Events. The Board agrees, to the extent permitted by law and to the extent that the Board does not violate applicable confidentiality requirements, to timely notify TeamCFA of any anticipated or known: (i) material health or safety issues, (ii) labor, employee or funding problems, (iii) actual or threatened civil litigation, administrative agency proceedings or other legal proceedings, or (iv) problems of any other type that could adversely affect TeamCFA in complying with its responsibilities hereunder.

D. Retained Authority. To the extent required by law, the Board shall retain the authority to make reasonable regulations relative to anything necessary for the proper establishment, maintenance, management, and carrying on of School, including regulations relative to the conduct of pupils while in attendance at School or in route to and from School. The Board retains the ultimate responsibility for the approval and oversight of School's budget and oversight of TeamCFA in deliverance of School's curriculum.

E. Food Service. TeamCFA and the Board will agree on whether the School will provide food service and the form of such food service. To the extent permitted by applicable

law or regulation, the Board shall provide authority to TeamCFA to manage, operate and administer any such food service for School including but not limited to cause all conditions necessary to satisfy all requirements of the Federal Statutes regarding the National School Lunch Program at 7 C.F.R. §210.1, et seq.

F. Office Space. The School shall provide TeamCFA and its employees with suitable office space at School at no cost, provided the requested space is: (i) available and can be provided without materially prejudicing the Educational Program; and (ii) used only for activities related to School.

ARTICLE V ARTICLE V FINANCIAL ARRANGEMENTS

A. Revenues. Except as hereinafter provided, all monies received by School shall be deposited in School's depository account with a financial institution acceptable to the Board (the "Operating Account"). The signatories on the account shall be designated by the Board. Interest income earned on School depository accounts shall accrue to School. Except as specifically excluded by the terms of this Agreement, the term "Revenues" shall include all funds received by or on behalf of School, including but not limited to: (1) funding for public school students enrolled in School; (2) special education funding provided by Federal, State and Local Governments to School that is directly allocable to special education students in School; (3) gifted and talented funding provided by Federal, State and Local Governments that is directly allocable to gifted and talented students in School; (4) "at-risk" funding provided by Federal, State and Local Governments to School that is directly allocable to "at-risk" students in School; (5) funding provided by Federal, State and Local Governments to School that is directly allocable to students in School with limited English proficiency; (6) Federal, State and Local grant sources, including Title I and Charter School start-up funds, which are directly allocable to School; (7) grants and donations received by School (except to the extent TeamCFA is not required or involved in soliciting, administering, or managing such grants and/or donations); and (8) fees charged to students and others for extra services, as and to the extent permitted by law.

B. Expenses. Revenues shall be expended by the School in accordance with the approved Annual Budget and as otherwise authorized by the Board. The expenditure of Revenues received from governmental entities shall be consistent with all applicable regulations and policies, and in the case of private donations, the directives of the donor where applicable.

C. Advances by TeamCFA. To the extent that there are not sufficient funds in the Operating Account to pay operating expenses, TeamCFA may, at TeamCFA's option, deposit funds into School's Operating Account ("Operating Advances"). Operating Advances can only be made in accordance with the approved Annual Budget. With Board approval, TeamCFA may charge School interest on any such Operating Advances per agreed rate. School shall reimburse TeamCFA all Operating Advances, together with any interest earned thereon from Revenues, as and when the funds become available. The School's obligation to reimburse Operating Advances will be payable so long as School maintains an adequate balance in its accounts between the amount of School's Revenues and the amount of Revenues actually expended in operation or management of School, and so long as the School has met its other expense and debt obligations

and maintains an adequate reserve fund balance, as allocated in the annual budget. If there is not an adequate balance to pay the entire amount of Operating Advances due to School suffering a net loss in any month, no further repayment of the Operating Advances shall be made until the cumulative amount of all such losses is recouped against net income of School earned in succeeding months.

D. Budget. TeamCFA shall manage the budget, accounting, and financial reporting functions for School in accordance with the provisions of its charter contract and the approved annual budget (the “Annual Budget”). TeamCFA shall prepare and submit to the Board for its approval for each operating and financial year of twelve months ending June 30 (the “Fiscal Year”), an Annual Budget for School. Each Annual Budget shall state an estimate for the coming Fiscal Year for (i) Revenues; (ii) Operating Expenses; (iii) Reserve Expenses; (iv) Audit Expenses; and (v) Fund Balance. “Reserve Expenses” means the amount of money reflected in the Annual Budget that TeamCFA must deposit into an account (the “Reserve Expense Account”) to be used for the establishment of reasonable reserves for long-term renewal and replacement of the school facility or portions thereof. TeamCFA shall obtain prior approval from the Board before withdrawal of funds from the Reserve Expense Account.

(i) TeamCFA shall submit to School for its review and approval a preliminary Annual Budget for each Fiscal Year for School, on or before May 31 of the current Fiscal Year. It is the intent of this provision that TeamCFA prepare and submit to School a balanced Annual Budget, which shall provide for full payment of all expenses of any kind, and establishment of any fund balance, from the budgeted Revenues.

(ii) The Board shall notify TeamCFA in writing that it approves the Annual Budget within thirty (30) days of submission by TeamCFA. If the Board does not approve the Annual Budget, the Board shall give specific reasons therefor, and shall continue to deposit the balance of Revenues into School’s Operating Account pursuant to its obligations in **Article V**. If the Board does not approve the Annual Budget within thirty (30) days of submission by TeamCFA, TeamCFA shall operate and manage School as though the Board has approved the Annual Budget. TeamCFA and the Board acknowledge that the Annual Budget shall be finalized no later than June 30 of each year.

(iii) TeamCFA may recommend amendments to the Annual Budget not less frequently than semiannually in order to make such modifications as it may from time to time find necessary or advisable pursuant to the terms above and its duties and responsibilities under this Agreement. The Board shall act on all such recommendations within 30 days of their submission by TeamCFA. Any such amendment shall only be valid if approved by the express vote of a majority of the Board.

(iv) TeamCFA shall operate and manage School in accordance with, and to the extent reasonably possible, within its Annual Budget. TeamCFA shall not cause the School to make an expenditure in amounts in excess of the amounts permitted in the applicable Annual Budget without the prior approval of the Board; provided that TeamCFA can move unused funds from

another line item in the Annual Budget in an amount less than \$1,000 to a new line item without the approval of the Board.

E. Compensation. With respect to compensation, School and TeamCFA agree as follows:

1. As reasonable compensation for its services, TeamCFA shall receive a services fee (the “Fee”) as set forth in this paragraph. The amount of the Fee to be paid to TeamCFA shall be equal to 10% of the sum of the following: (i) School’s state, local and federal revenues (excluding any local, state and federal revenues that cannot be used by law or regulation to pay compensation, and also excluding revenues from reimbursement programs such as food and sales taxes), and (ii) any revenue derived from fundraising conducted by TeamCFA for School. This Fee shall be defined in the Annual Budget approved by the Board. One-twelfth (1/12th) of the projected annual Fee (assuming a 10% rate), plus compensation for any additional services provided by TeamCFA, shall be paid monthly by School to TeamCFA on or before the 30th day of each calendar month during the term of this Agreement. This monthly fee is payable so long as School maintains an adequate balance in its accounts between the amount of School’s Revenues and the amount of Revenues actually expended by TeamCFA in operation and/or management of School, and so long as the school has met its expense and debt obligations and maintains an adequate reserve fund balance, as allocated in the annual budget. If there is not an adequate balance to pay the entire Fee due to School suffering a net loss in any month, no further payment of the Fee shall be made until the cumulative amount of all such losses is recouped against net income of School earned in succeeding months. TeamCFA may at their discretion propose a fee of less than 10%.

2. In the event that this Agreement is terminated by either party pursuant to **Article VII** of this Agreement, then TeamCFA shall be entitled to receive only the portion of the projected Fee remaining to be paid through the date of termination (i.e., 1/12th of the projected Fee for each month until the termination of the Agreement becomes effective). Upon the effective date of the termination of this Agreement, TeamCFA understands and agrees that it shall not be entitled to any other compensation, fees or monies from School. TeamCFA shall be responsible for all of its own costs and expenses necessary to fulfill its obligations under this Agreement, including, but not limited to, compensation and other benefits payable to any TeamCFA employee.

F. Availability of Funds. TeamCFA shall only be required to perform its responsibilities under this Agreement to the extent that there are sufficient Revenues to make payments in accordance with the terms of the Annual Budget.

G. Financial Reporting. TeamCFA shall provide the Board with:

1. The projected Annual Budget as required by the terms of this Agreement;

2. Detailed statements of all Revenues received, and detailed statements of all expenditures for services and or expenses rendered or incurred to or on behalf of School, whether incurred on-site or off-site, upon request;

3. Monthly financial statements by the 30th day of the following month, including a balance sheet, statement of revenues and expenditures;

4. Other information on a periodic basis to enable the Board to (i) monitor TeamCFA's performance and the efficiency of its operation of School, and (ii) furnish reports and information which School is required to provide pursuant to applicable laws and other applicable authority; and

5. All financial reports provided or prepared by TeamCFA shall be presented in accordance with GAAP and FASB requirements for nonprofit reporting, and such other requirements as may be imposed by the North Carolina Department of Public Instruction or North Carolina Department of State Treasurer.

H. Access to Records. TeamCFA shall keep accurate financial records pertaining to operation of School, together with all School financial records prepared by or in possession of TeamCFA, and shall retain all of the said records for a period of time as may be required by applicable law, but in any event not less than three (3) years. TeamCFA and School shall maintain the proper confidentiality of personnel, students, and other records as required by law.

I. Review of Operational Budget. The Board shall be responsible for reviewing and approving the Annual Budget of School as presented by TeamCFA.

J. Annual Audit. The Board shall select and retain an independent auditor, to conduct an annual audit of School in accordance with School's authorizing documents. Subject to applicable law, all financial and other records of TeamCFA related to School will be made available to School's independent auditor.

K. Financing/Operating Losses. Subject to the approval of a majority of the Board, TeamCFA may provide funds for operating losses for School, including funds for the development of a curriculum, technology system and school operations plan; recruiting, selecting and pre-service training of staff members; and cleaning, fixing and equipping of School facility as required by this Agreement. Any advances by TeamCFA shall be budgeted and shall be in amounts acceptable to a majority of the Board. TeamCFA shall be reimbursed from the Revenues as and when funds are available.

ARTICLE VI ARTICLE VI PERSONNEL & TRAINING

A. Personnel Responsibility. TeamCFA shall select and hire qualified personnel as employees of TeamCFA to perform services at School and shall ensure that all employees or contractors hired by TeamCFA who have direct, daily contact with students of School shall be subject to criminal background check requirements pursuant to applicable state laws, to the same

extent as employees of School. Each party shall be responsible for all compensation for their respective employees. The compensation of all School employees will be paid in accordance with the Budget referenced in **Article V** of this Agreement. Subject to the Board being the final authority as to matters related to the operation of School, TeamCFA shall have the responsibility and authority to determine staffing levels, and to select, evaluate, assign, discipline, transfer and terminate personnel consistent with state and federal law.

B. Chief Executive Officer. The Head of School will serve as CEO of School and manage School's management, including Principals and Operations Manager, and other employees in accordance with policies adopted by the Board. The Board will approve all employee contracts. TeamCFA shall develop and implement the educational program for the Board. If the Head of School ceases to serve as the CEO under this Agreement for any reason, including death, disability, resignation, or removal, the CEO of TeamCFA or his or her designee shall act as interim CEO of the School pending selection of a new Head of School. The CEO is not a member of the Board, but shall be entitled to participate in all discussions with the Board, with the exception of (i) votes related to the Board's agreement with TeamCFA and (ii) such other discussions that the Board deems, in its sole discretion, appropriate to exclude the CEO from.

C. Principals and Administrators. The accountability of TeamCFA to School is an essential component of this Agreement. Since the responsibility of leadership is critical to School's success, TeamCFA shall have the authority to select, subject to final Board approval, and supervise each Principal. TeamCFA shall have the authority to select, subject to final Board approval if required by law, and supervise each Operations Manager and Administrator and to hold them accountable for the success of School. Principals, Operations Manager and other Administrators shall be employees of School.

D. Teachers. The Board shall approve teacher contracts. Subject to the final approval of a majority of the Board, TeamCFA shall determine the number of teachers, and the applicable grade levels and subjects, required for the operation of School. TeamCFA shall assist in recruiting for School such teachers, qualified in the grade levels and subjects required, as are required by School. Teachers shall be employees of School. The curriculum taught by such teachers shall be consistent with the Educational Program. Such teachers may, in the discretion of TeamCFA, work at School on a full or part time basis. If assigned to School on a part time basis, such teachers may also work at other schools managed or operated by TeamCFA. Each teacher assigned to School shall have such credentials, certifications and experience as may be required under all applicable laws, and shall undergo a criminal background check.

E. Support Staff. Subject to the final approval of a majority of the Board TeamCFA shall determine the number of support staff required for the operation of School. To the extent permitted by law, Team CFA shall determine the functions of support staff. TeamCFA shall provide, or assist School in retaining, qualified staff to efficiently operate School in accordance with all applicable law and the goals for School as defined by the Board in consultation with TeamCFA. Support staff will be employees of School. The support staff may, in the discretion of TeamCFA, work at School on a full or part time basis. If assigned to School

on a part time basis, the support staff may also work at other schools managed or operated by TeamCFA.

F. Training. TeamCFA shall provide training in its methods, curriculum, program, and technology to all teaching personnel on a regular basis. Instructional personnel shall receive at least the minimum hours of professional development required by applicable laws. Non-instructional personnel shall receive such training as TeamCFA determines reasonable and necessary under the circumstances.

G. Limitations on Discretion. All decisions made by TeamCFA, and any discretion exercised by TeamCFA, in its determination of staffing levels and its selection, evaluation, assignment, discipline, and transfer of personnel, shall be consistent with the Annual Budget, local, state and federal law, and consistent with the parameters adopted and included within the Educational Program approved by the Board.

ARTICLE VIII TERMINATION

A. Termination.

1. TeamCFA may terminate this Agreement prior to the end of the Term if the Board fails to remedy a material breach of this Agreement within sixty (60) days after receiving a notice from TeamCFA of such breach. For purposes of this Subsection, a material breach includes, but is not limited to: (i) TeamCFA's failure to timely receive any compensation or reimbursement required by this Agreement; (ii) a suspension, revocation, or non-renewal of the Charter; or (iii) a decision by the Board not to adopt TeamCFA's recommendations as to a specific policy, rule or regulation, that inhibits, in TeamCFA's opinion, TeamCFA's ability to implement the school design as set forth in the Charter.

2. School may terminate this Agreement prior to the end of the Term if TeamCFA fails to remedy a material breach of this Agreement within (60) days after receiving a notice from School of such breach. For purposes of this Subsection, a material breach includes, but is not limited to: (i) failure to account for its expenditures or pay School's operating costs (provided funds are available to do so) in accordance with the Annual Budget, (ii) failure to follow policies, procedures, rules or curriculum duly adopted by the Board which are not in violation of this agreement, the Charter or applicable law, (iii) insufficient progress in attaining student achievement objectives of the Agreement, and it is not likely that such objectives can be achieved before expiration of this Agreement, (iv) the health, safety, or welfare of any student or the student body is threatened, (v) violation of law, (vi) the revocation, suspension or termination of licenses/certifications needed for any School operations solely as direct result of an act or failure to act by TeamCFA, (vii) the revocation by the State of School's charter, or a default thereunder, solely as the direct result of an act or failure to act by TeamCFA, (viii) a receipt by the Board of an unsatisfactory report from TeamCFA or an independent education consultant retained by the Board regarding the Services or School's

performance, provided such report cannot be adequately corrected or explained; or (ix) if TeamCFA is found by an administrative or judicial body to have made fraudulent use of funds, or if an administrative or judicial body has revoked any license that may be required for TeamCFA to carry on its business and perform its obligations and functions under this Agreement.

3. Notwithstanding the foregoing, either party may terminate this Agreement prior to the end of the Term as described in Article II, above, with or without cause, as of June 30 of any calendar year by providing the other party written notice of termination by April 1 of the same calendar year.

B. Effect of Termination. Upon the effective date of termination or expiration of this Agreement:

1. TeamCFA shall have the right to remove from School any equipment or other assets owned or leased by TeamCFA;

2. School shall pay or reimburse TeamCFA through the Fee for the prepaid portion of any expenses or liabilities incurred by TeamCFA pursuant to the Budget as of the date of such termination or expiration, provided TeamCFA supplies School with documentation of all such expenses and liabilities;

3. If requested by the Board, TeamCFA may, in its sole discretion, assist School for a reasonable amount of time, not to exceed ninety (90) days, and for a reasonable fee, with School's transition to another administrative or managerial arrangement, including transferring all student records and any and all other non-proprietary information and providing necessary assistance to ensure the least disruption of School's operation as a result of the termination of this Agreement.

4. TeamCFA shall reasonably assist School in the execution of a closure plan (if applicable) and cooperate in the closure process, including without limitation, in any audits and court or other proceedings related thereto.

ARTICLE VIII **ARTICLE VIII** **INSURANCE**

A. Insurance Coverage. Each party shall maintain such insurance in the coverage amounts as may be required by applicable law or contract, with the other party listed as an additional insured. TeamCFA shall be responsible for payment of the premiums associated with its insurance coverage required by applicable law or contract. Revenues from School will be used to purchase required insurance and such other insurance as the Board may deem necessary or advisable, which shall include director and officer insurance for persons serving on the Board, and commercial general liability insurance naming TeamCFA as an additional insured. Each party shall, upon request, present evidence to the other that it maintains the requisite insurance in compliance with the provisions of this paragraph. Each party shall comply with any information

or reporting requirements required by the other party's insurers, to the extent reasonably practicable.

B. Workers' Compensation Insurance. Each party shall maintain workers' compensation insurance as required by applicable laws covering their respective employees.

ARTICLE IX WARRANTIES AND REPRESENTATIONS

A. School Warranties and Representations. School represents that it has the authority under law to execute, deliver and perform this Agreement and to incur the obligations provided for under this Agreement. The Board warrants that its actions have been duly and validly authorized, and that it will adopt any and all resolutions or expenditure approvals required for execution of this Agreement.

B. TeamCFA Warranties and Representations. TeamCFA warrants and represents that it is a North Carolina nonprofit corporation in good standing and is authorized to conduct business in the State of North Carolina. TeamCFA will comply with all registration and licensing requirements relating to conducting business under this Agreement. School agrees to assist TeamCFA in applying for such licenses and permits and in obtaining such approvals and consents; provided, however, any cost or expenses in applying for such licenses, permits, approvals and consents shall be the sole obligation of TeamCFA.

C. Mutual Warranties. School and TeamCFA mutually warrant to the other that there are no pending actions, claims, suits or proceedings, to its knowledge, threatened or reasonably anticipated against or affecting it, which if adversely determined, would have a material adverse effect on its ability to perform its obligations under this Agreement.

ARTICLE IX ARTICLE X INDEMNITY

A. TeamCFA Indemnification. TeamCFA agrees to indemnify and hold School, its affiliates, successors, assigns, officers, directors and employees (the "School Indemnitees"), harmless from and against any and all actions, demands, liabilities, expenses, losses, damages, claims, workers compensation, fines, penalties and costs (including all reasonable attorneys' fees whether incurred by any School Indemnitee or awarded against any School Indemnitee) ("Losses") that any School Indemnitee may sustain or incur as a result from any violation of law or breach of this Agreement by or on behalf of TeamCFA or TeamCFA's gross negligence or willful misconduct in connection with the services provided by Team CFA under this Agreement.

B. School Indemnification. School shall indemnify, save and hold TeamCFA, its affiliates, successors, assigns, officers, directors and employees (the "TeamCFA Indemnitees") harmless from and against any and all Losses that any TeamCFA Indemnitee may sustain or incur as a result of (a) any actual or alleged injury of School's personnel arising out of or in any way relating to this Agreement, the services provided hereunder or products supplied hereunder,

provided that the foregoing does not apply to the extent any such Loss is caused solely by TeamCFA's gross negligence or willful misconduct; (b) any actual or alleged damage to any property or person to the extent arising out of any act or omission of School or School's personnel in the performance of this Agreement; (c) any breach of this Agreement or violation of law by or on behalf of School, and (d) any claim by any third party, including without limitation any student, parent, teacher, coach or other school personnel or any persons on school property, and losses arising from or in connection with any such claim, unless such third party claim arises as a result of TeamCFA's gross negligence or willful misconduct.

ARTICLE X ARTICLE XI
MISCELLANEOUS

A. Sole Agreement. This Agreement supersedes and replaces any and all prior agreements and understandings between School and TeamCFA.

B. Force Majeure. Notwithstanding any other sections of this Agreement, neither party shall be liable for any delay in performance or inability to perform due to acts of God or due to war, riot, embargo, fire, explosion, sabotage, flood, accident, labor strike, or other acts beyond its reasonable control; provided either party may terminate this Agreement in accordance with the termination provisions contained in this Agreement if sufficient grounds exist as provided in the Article of this Agreement governing termination.

C. Governing Law. The rights of all parties hereto shall be subject to the jurisdiction of and be construed according to the laws of the State of North Carolina.

D. Agreement in Entirety. This Agreement constitutes the entire agreement of the parties and supersedes any prior agreements between the parties hereto.

E. Official Notices. All notices and other communications required by the terms of this Agreement shall be in writing and sent to the parties hereto at the facsimile number or address set forth below. Notice may be given by: (i) by facsimile with written evidence of confirmed receipt by the receiving party of the entire notice, (ii) certified or registered mail, postage prepaid, return receipt requested, or (iii) personal delivery. Notice shall be deemed to have been given on the date of transmittal or personal delivery if given by facsimile or personal delivery, or upon the date of postmark if sent by certified or registered mail. Notices to School shall be sent to the current address of the then current Board President or Chairman, with a copy to the then current Board attorney. The address of the parties hereto for the purposes aforesaid, inclusive of the address of the Board Chairman and Board attorney, are as follows:

School:

Martin McCarthy
49 Means Avenue SE
Concord, NC 28025

TeamCFA:

Anthony Helton, CEO
152 East Main Street
Forest City, NC 28043
Telephone: 866-495-2221

F. Assignment. Neither party may assign this Agreement without the written consent of the other, which consent shall not be unreasonably withheld.

G. Amendment. This Agreement shall not be altered, amended, modified or supplemented except in writing and approved by the Board and TeamCFA and signed by both the Chairman of the Board and the CEO of TeamCFA.

H. Waiver. No waiver of any provision of this Agreement shall be deemed or shall constitute a waiver of any other provision, nor shall such waiver constitute a continuing waiver unless otherwise expressly stated.

I. Delegation of Authority. Nothing in this Agreement shall be construed as delegating to TeamCFA powers or authority of the Board, which are not subject to delegation by the Board under applicable law.

J. Compliance with Law. The parties to this Agreement agree to comply with all applicable laws and regulations.

K. Compliance with Charter. The parties to this Agreement agree to comply with the terms and conditions set forth in the Charter and the terms and conditions of the Charter are incorporated herein by reference.

L. Indebtedness. No indebtedness 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.

APPENDIX D

Competitive Preference Standards

Appendix D1

2. Increasing the racial and ethnic diversity in their new, expanded, or replicated school.

TeamCFA: Bonnie Cone Classical Academy plans to implement an aggressive plan to market to and enroll a greater number of educationally disadvantaged students, which will enhance the diversity of the student population. BCCA's outreach plan, which includes leveraging the expertise of an outreach consultant, will reach into low resource areas and communities with a higher representation of racial, ethnic and linguistic minorities. Since the school has not yet opened, it is difficult to determine and document the specific percentage-based increases the outreach plan will bring about in terms of racial and ethnic diversity; however, given the ambitious nature of the outreach plan, the impacts will likely be significant. The outreach plan provided in this proposal is submitted as the evidence of the school's commitment to serve a more diverse student population. The outreach plan includes:

- 1.) Contracting with an outreach consultant who will utilize best practices in the field of marketing to raise awareness about the school and provide specific information on the school's support services to the community. As stipulated in the scope of work for this contracted service, the outreach consultant must provide or subcontract for translation services to ensure that marketing materials are appropriately translated and culturally responsive.
- 2.) Developing and maintaining partnerships with community organizations that serve diverse and educationally disadvantaged families.
- 3.) Increasing the amount of marketing materials that are distributed to the public, as evidenced by the budget line item for marketing materials.

APPENDIX E

Priority Consideration Status

Appendix E1

N/A

APPENDIX F

Additional Supplementary Documentation

Appendix F1

Kenan Fellows Program Partnership – Timeline and Details

September 2019 – School sends allocated amount to the Kenan Fellows Program (KFP).

October – KFP coordinates the fellowship experience, including a summer internship experience with an industry/researcher in the teachers' community. KFP finalizes fellowship details with the school.

October-January – Teachers from the school complete the KFP online application.

February-March – KFP plans an in-person interview/meet up between the teachers and the selected industry/research mentor(s).

May – Teachers are formally announced as Kenan Fellows with the rest of their cohort.

June – Teachers receive the first portion a fellowship stipend (\$3,000) and attend a residential professional development institute.

June-July – Teachers spend three weeks working with their industry/research mentor and school-level curriculum mentor (ImplementEd).

August-October – Teachers continue to develop the extended learning curriculum.

October – Teachers attend a two-day residential professional development institute. Teachers submit curriculum to KFP staff for feedback.

November-March – Teachers collaborate with the school-level curriculum mentor to pilot curriculum activities in their classroom and then modify as necessary. Teachers work with the administration and/or community organizations to secure any necessary supplies for the summer extended learning opportunity.

April-May – Teachers attend cohort graduation at NC State University and receive the second portion of a fellowship stipend (\$2,000).

June 2020 – As part of their fellowship expectation, teachers pilot the extended learning curriculum in a 3-4 day, half day summer program. Teachers will invite their mentors and community members to observe and participate.

Post Fellowship – 1.) Serve as a leader in the school; 2.) Actively participate in and contribute to the Kenan Fellows Program Alumni Network; and 3.) Facilitate a session on the fellowship experience and extended learning curriculum at the Office of Charter School's annual Charter School Leadership Institute.

*The process will repeat with two additional teachers in the second project year. The second cohort will expand and improve the curriculum based on feedback from the pilot. This process will contribute to a fully developed and cost-effective extended learning model and will equip and empower teachers to take a leadership role within the school.

Appendix F2

Scope of Work for TBD (“Contractor”)

1. **Reports to:** School Director and/or Board Chairperson
2. **Primary Duties:** Mental Health Support Services
3. **Contract Total:** \$20,000 over the contract period/\$10,000 per year (inclusive of all travel-related expenses); Contractor will be responsible for recording time and job duties and reporting such information to the school principal and/or chairperson of the Board of Directors as requested.
4. **Term:** Upon receipt of subgrant funding and until the end of the project period, or until all activities have been completed as determined and directed by the school principal and/or board chairperson.
5. **Contractor Responsibilities.**
 - Commit to providing at least 100 hrs./year of mental health support and consulting services to the school, including students, staff and school administration.
 - Provide ongoing feedback on how mental health support interventions could be improved or more effectively incorporated into the school’s academic and operational processes.
 - Collaborate with the Implementation Specialist to develop a school-specific mental health professional development protocol and standard operating procedures (SOPs) that align with best practices in mental health services support.
6. **Ownership of Contract Products:** Contractor agrees that any work completed while under this contract is the property of the entity so designated in the RFP and/or proposal.
7. **Miscellaneous:**
 - Any termination of work by either party will result in a prorated pay based on the completed items submitted as determined by the project director
8. **Agency Contacts:**

Joan Roman, Principal, jroman@teamefabcca.org

Appendix F3

Scope of Work for ImplementEd/Craig Tucker (“Contractor”)

1. **Reports to:** School Director and/or Board Chairperson
2. **Primary Duties:** Curriculum Development, Professional Development and Evaluation
3. **Contract Total:** \$32,000 over the contract period/\$16,000 per year (inclusive of all travel-related expenses); Contractor will be responsible for recording time and job duties and reporting such information to the school principal and/or chairperson of the Board of Directors as requested. Provide at least 160 hours of support per year.
4. **Term:** Upon receipt of subgrant funding and until the end of the project period, or until all activities have been completed as determined and directed by the school principal and/or board chairperson.
5. **Contractor Responsibilities.**
 - Ensure alignment between professional development offerings and teacher/school needs, including regularly sharing aligned professional development opportunities that may exist beyond those mentioned in this proposal.
 - Provide regular updates on evaluation findings to the school administration as well as an annual report with recommendations for improvements, which will be used formatively to make modifications to the services provided to ED students and their families.
 - Develop a process through which newly acquired knowledge and skills can be captured following a professional development experience and then transition the information into a continually updated and easily accessible staff professional development curriculum.
 - Monitor the effectiveness of existing classroom-level informal assessment strategies and propose new and appropriately aligned techniques that will provide greater insight into student achievement, especially among educationally disadvantaged subgroups.
 - Serve as the school-level mentor for the teachers completing a Kenan Fellowship and assist in the development and implementation of the summer extended learning program.
 - Implement the evaluation and research plan as defined in the proposal.
6. **Ownership of Contract Products:** Contractor agrees that any work completed while under this contract is the property of the entity so designated in the RFP and/or proposal.
7. **Miscellaneous:**
 - Any termination of work by either party will result in a prorated pay based on the completed items submitted as determined by the project director
8. **Agency Contacts:**

Joan Roman, Principal, jroman@teamefabcca.org



10 Actions to Understand and Educate Students Application of a Framework for Understanding Poverty

Agenda

- 8:30 am – 9:00 am **Introduction**
My Personal Experience with Class
Understanding Class Differences
- 9:00 am – 11:30 am * **Action 1:** Build relationships of mutual respect
Action 2: Teach students the hidden rules of school
Action 3: Analyze the resources of your students and make interventions based on resources the student has access to
Action 4: Teach formal register, the language of school and work
Action 5: Teach abstract processes
- 11:45 am – 12:15 pm **Working Lunch**
- 12:15 pm – 2:45 pm * **Action 6:** Teach mental models
Action 7: Teach students how to plan
Action 8: Use the adult voice and reframing to change behaviors
Action 9: Understand the family resources and dynamics
Action 10: Teach how to ask questions
Checklist activity: which actions do you already do and which of these will you add?
- 2:45 pm – 3:00 pm **Closure and Evaluation**

* includes a break



A Framework for Understanding Poverty Workshop Descriptor

A Framework for Understanding Poverty workshop provides an in-depth study of information and issues that will increase the participants' knowledge and understanding of the poverty culture. This workshop covers the following topics: 12 key points in understanding poverty, resources and case studies, registers of language, story structure, cognitive development, family structure, hidden rules, discipline interventions, and building relationships. This workshop is designed for audiences of both elementary and secondary-level educators with adaptation and application for community, social service and faith community audiences.

Framework for Understanding Poverty

Objectives

Participants will be able to:

- Analyze the eight resources of a student
- Explain language registers, discourse patterns, and story structure
- Give examples of hidden rules among classes
- Identify discipline interventions that are effective
- Explain mediation and cognitive strategies
- Explain how economic realities affect patterns of living

Appendix F6

Scope of Work for Outreach Consultant (“Contractor”)

1. **Reports to:** School Director and/or Board Chairperson
2. **Primary Duties:** Marketing and Recruiting, Outreach Planning
3. **Contract Total:** \$18,000 over the contract period/\$9,000 per year (inclusive of all travel-related expenses); Contractor will be responsible for recording time and job duties and reporting such information to the school principal and/or chairperson of the Board of Directors as requested.
4. **Term:** Upon receipt of subgrant funding and until the end of the project period, or until all activities have been completed as determined and directed by the school principal and/or board chairperson.
5. **Contractor Responsibilities.**
 - Commit to providing at least 90 hrs./year of support for the school’s project implementation and opening process.
 - Lead in the development of new marketing materials.
 - Provide translation services to ensure that all marketing materials are accurately translated and culturally responsive.
 - In collaboration with the administrative team, develop a detailed and actionable outreach strategy.
 - Regularly meet with the school’s administrative team and provide recommendations on ways to improve the school’s marketing efforts.
6. **Ownership of Contract Products:** Contractor agrees that any work completed while under this contract is the property of the entity so designated in the RFP and/or proposal.
7. **Miscellaneous:**
 - Any termination of work by either party will result in a prorated pay based on the completed items submitted as determined by the project director
8. **Agency Contacts:**

Joan Roman, Principal, jroman@teamefabcca.org

Appendix F7

Itemized List

Math Manipulative Kits (Yr. 1 - \$11,000; Yr. 2 - \$3,000; Project Total - \$14,000)

Kindergarten Kit (\$675.00 per unit) – Qty. 4 (Yr. 1)

<http://eureka-math-complete-manipulative-kit-gr-k.html>

Grade 1 Kit (\$420.00 per unit) – Qty. 4 (Yr. 1)

<http://eureka-math-complete-manipulative-kit-gr-1.html>

Grade 2 Kit (\$465.00 per unit) – Qty. 4 (Yr. 1)

<http://eureka-math-complete-manipulative-kit-gr-2.html>

Grade 3 Kit (\$515.00 per unit) – Qty. 2 (Yr. 1); 2 (Yr. 2)

<http://eureka-math-complete-manipulative-kit-gr-3.html>

Grade 4 Kit (\$465.00 per unit) – Qty. 2 (Yr. 1); 1 (Yr. 2)

<http://eureka-math-complete-manipulative-kit-gr-4.html>

Grade 5 Kit (\$275.00 per unit) – Qty. 2 (Yr. 1); 1 (Yr. 2)

<http://eureka-math-complete-manipulative-kit-gr-5.html>

Grade 6 Kit (\$150.00 per unit) – Qty. 2 (Yr. 1); 1 (Yr. 2)

<http://eureka-math-complete-manipulative-kit-gr-6.html>

Grade 7 Kit (\$220.00 per unit) – Qty. 0 (Yr. 1); 2 (Yr. 2)

<http://eureka-math-complete-manipulative-kit-gr-7.html>

Total: \$9,050 (Yr. 1); \$2,360 (Yr. 2), allocated amounts anticipates shipping-related costs

Core Knowledge Curriculum Kits (Printed) (Yr. 1 - \$22,500; Yr. 2 - \$0; Project Total - \$22,500)

Kindergarten (\$3,999 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-k-complete-program/products/ckla-2nd-edition-gk-complete-classroom-kit>

Grade 1 (\$3,499 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-1-complete-program/products/ckla-2nd-edition-g1-complete-classroom-kit>

Grade 2 (\$3,899 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-2-complete-program/products/ckla-2nd-edition-g2-complete-classroom-kit>

Grade 3 (\$2,999 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-3-kits/products/ckla-2nd-edition-g3-classroom-kit>

Grade 4 (\$2,499 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-4-kits/products/ckla-2nd-edition-g4-classroom-kit>

Grade 5 (\$2,699 per unit) – Qty. 1 (Yr. 1)

<https://myshop.amplify.com/collections/ckla-2nd-edition-grade-5-kits/products/ckla-2nd-edition-g5-classroom-kit>

Total: \$19,594 (Yr. 1); \$0 (Yr. 2), allocated amounts includes shipping-related costs

Central-Use Printer (Yr. 1 - \$3,000; Yr. 2 - \$0; Project Total - \$3,000), allocated amount includes shipping and/or setup fees.

A sample item is the Canon C3525i II Color Multifunction Printer.

https://copyfaxes.com/product/7278/Canon-imageRUNNER-ADVANCE-C3525i-II-Color-MultifunctionPrinter?utm_source=productlistingads&utm_medium=adwords&utm_campaign=adwords&gclid=EAIaIQobChMI4fRsvGM4QIVCZ-fCh1NQgruEAYYBCABEgKyP_D_BwE

CERTIFICATION

I certify that I have the authority to submit this application on behalf of the authorized charter school listed above. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or termination after an award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the authorized charter school listed above.

Jan Roman
Signature of Charter School Authorized Representative

3-22-2019
Date

Exhibit C: NC ACCESS Program Subgrant Application Evaluation Rubrics



**North Carolina Advancing Charter Collaboration
and Excellence for Student Success (NC ACCESS) Program
Subgrant Application Rubric**

Applicant: **Team CFA: Bonnie Cone Classical Academy**

Reviewer Name: **Meredith A. Flowe**

Overview of the NC ACCESS Subgrant Program

In 2018, the North Carolina Department of Public Instruction (NCDPI) was awarded a Public Charter Schools Program (CSP) grant from the U.S. Department of Education (USDOE) of approximately \$26,600,000. The CSP grant will be used to implement the North Carolina Advancing Charter Collaboration and Excellence for Student Success (NC ACCESS) Program to:

1. Increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students;
2. Develop a cohort of 100 charter school leaders who can develop and demonstrate best practices in serving educationally disadvantaged students; and
3. Broadly disseminate best practices in serving educationally disadvantaged students and foster collaboration in the charter school community and between charter schools and traditional public schools.

The NC ACCESS Program and CSP define educationally disadvantaged students as students who are economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

The NC ACCESS program has allocated the majority of the CSP funds to advance Priority 1 listed above through school-level subgrants, though subgrant recipients must also demonstrate a desire to share best practices with both charter schools and traditional public schools. For each of the five (5) years of the federal CSP award, the NC ACCESS Program will run a competitive subgrant competition and award subgrants to North Carolina charter schools that propose a comprehensive plan to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students.

Ratings and Criteria

The NC ACCESS Subgrant Program is a competitive application process designed to award funding for schools that propose to serve an increased number of educationally disadvantaged students. Each subgrant application will be reviewed by a team of NC ACCESS Program team members and external evaluators. All evaluations will be considered, and a recommendation will be made to the Charter School Advisory Board (CSAB). The CSAB will take all recommendations, application reviews, and due diligence into account and make a recommendation for the approval of subgrants to the State Board of Education (State Board). The State Board will determine the final approval of all subgrant awards.

A subgrant application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to successfully implement the proposed plans to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students. In addition to meeting the criteria that are specific to each section, each part of the proposal should align with the overall mission, budget, and goals of the application and NC ACCESS Program.

Recommendations for approval or denial will be based on the completed application which includes school information, signed assurances, enrollment projections, application narrative, budget, budget narrative, logic model, and appendices. The enrollment projections, application narrative, budget, budget

narrative, and logic model are scored out of a possible 100 points. Applicants must score at least 80 points to meet the standard.

Applications that do not meet standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

Instructions for Reviewers

Reviewers should complete each rubric section based on the evidence provided in the application. There are eight (8) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Enrollment Projections
- IV. Application Narrative (no more than fifteen (15) pages)
 - a. If applicable, a school closure plan (no more than five (5) pages)
- V. Budget, Budget Narrative, and Logic Model (no more than five (5) pages)
- VI. Competitive Preference Standards (optional)
- VII. Priority Consideration Status
- VIII. Certification

Please note that there may be appendices to support information provided in the above sections. When evaluating an application, reviewers should both rate each section and provide comments, if applicable. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for educationally disadvantaged students. Responses should clearly align with the mission, goals, and budget of the proposed plan. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving educationally disadvantaged students. Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses/areas of concern of each section of the application. The comments and evidence provided are as significant as the rating. Below are examples of specific and detailed comments:

Strengths of the application:

- “The plan aligns with the overall mission and goals because...”
- “The education and discipline plans are research based and proven effective with the targeted population of students because...”
- “The lunch program is comparable to the National School Lunch Program and will support an educationally disadvantaged population by...”
- “The marketing plan clearly outlines how the school will recruit and enroll a higher educationally disadvantaged population by...”
- “The budget uses sound assumptions and is consistent with the goals of the proposed plan.”

Weaknesses/areas of concern of the application:

- “The curriculum and school calendar do not align with the mission and goals because . . .”
- “The discipline plan does not include provisions for students with disabilities.”
- “The budget assumptions include the unallowable use of funds for construction.”
- “The plan proposes two buses, but there is no accompanying line item in the budget that allocates funds for purchasing buses.”

Applicant: TEAM CFA: Bonnie Cone Classical Academy

Once all eight (8) rating sections are scored individually, the applicant should complete the summary ratings page with all final ratings and scores. In order to pass the review, applicants must (a) meet all criteria in sections (I), (II), and (VIII); and (b) score at least 80 combined points between sections (III), (IV), (V), and (VI). Section (VII) will be used to determine priority if there are more eligible applications than subgrant awards. The CSAB will make a final recommendation to the State Board on subgrant awards. The State Board will determine the final approval of all subgrant awards.

**Please remember that all documents, including your individual review, may at some time be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

- All applicant contact information is complete and accurate.

Status:	Complete X <input type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section II – Assurances

- Assurances are signed.

Status:	Complete X <input type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section III – Enrollment Projections

- Enrollment projections are complete, ambitious, and realistic.
- Enrollment projections demonstrate a significant increase of educationally disadvantaged students, including economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

Points Possible:	10	Points Earned:	8
Overall Strengths:			
<p>Enrollment projects demonstrate projected 35% growth in ED students as a percentage of overall student population in 5 years. This is ambitious growth level, realistic in that they year to year increases range from 5-10% higher than previous year.</p>			
Overall Weaknesses/Areas of Concern:			
<p>Opening in year one with serving a projected 450 students across grades K-6 is a significant undertaking requiring curriculum, hiring, student recruitment, etc. for 7 grade levels of students. How will there be a guarantee that there is capacity to implement goals outlined w/ NC ACCESS in relation to ED population. Also, if they are not open why would they not seek to have 45-50% of their initial enrollment be ED students so they are instantly meeting needs of ED students and their families in the community?</p>			

Section IV – Application Narrative (*see subgrant application for full list of narrative questions)

- Clear rationale for how the projected enrollment figures are ambitious and feasible, including the implementation of a weighted lottery.
- Detailed description of how the educational program, school calendar, and professional development plans are specifically tailored to meet the needs of educationally disadvantaged students.
- At least three (3) school-specific SMART goals are provided to support the proposed plan.
- Clear explanation of how the charter school’s education plan compares to or differs from that of the local LEA(s).
- General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.
- Clear description of the strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.
- Detailed description of the roles and responsibilities of the applicant, partner organizations, and CMO/EMO, including the administrative and contractual roles and responsibilities of such partners.
- Detailed plan for how the governing board will contribute to the recruitment and development of educationally disadvantaged students.
- Clear vision for the school’s climate philosophy and a comprehensive discipline plan that supports the development of educationally disadvantaged students.
- Detailed marketing and recruiting plan is described, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students.
- Clear and comprehensive transportation and school lunch plans are provided.
- A coherent plan to implement the parent/community advisory council.
- If applicable, detailed plans for forming a Student Transition Committee and a clear and specific Student Transition Plan.

Points Possible:	60	Points Earned:	40
Overall Strengths:			
<p>-Summer extended learning program and tutoring sessions outside of school day are wonderful strategy for ensuring students maintain momentum in achieving their academic performance goals.</p> <p>-Quarterly Roundtable Discussions that include collaboration w/ both district and charters are great way to share best practices for serving ED students and lay foundation for collaboration in the future, which is in the best interests of all students served by district and public schools in the community.</p> <p>-Leveraging key partnerships – i.e. Kenan Fellows</p>			
Overall Weaknesses/Areas of Concern:			
<p>-In addition to weighted lottery amendment to their charter, what are the specific communication/marketing strategies they will utilize to ensure that they reach families w/ ED students so they enter the lottery for admission?</p> <p>-When sub-grant ends will the summer program and out-of-school time tutoring programs be maintained? – will they be financially sustainable?</p> <p>-Description of how curriculum will address specific needs of ED students does not include much detailed explanation. There is a good bit of the narrative that describes WHAT they will do, but NOT the mechanics of HOW they will accomplish their goals with ED students.</p>			

-The collaborative quarterly roundtables are great idea, but how will they execute? i.e. how will they ensure that other schools (be they district or charter) are open and engaged to participating? – how will the sessions be messaged? -- how will the sessions be facilitated to ensure that participant schools feel like participation is a valuable use of their time and resources?

-Is this school taking on too much in their first years? – while best practice research to share with wider education community is a helpful to increasing our ability to serve ED students will they have the capacity to execute? Even though they are hiring a third party to execute research component, it will still require internal staff time to provide data, etc. Have they ensured their planning will have any data used be in compliance with FERPA?

-While it is great that they are planning to contract for translation services and mental health services is there enough resources/time being given to internal staff training to best serve ED population?

-How will the school ensure that targeted marketing gets into the hands of families w/ ED students? There is only discussion of hiring consultant – schools who are effective in serving high needs populations put boots on the ground to reach families and recruit ED students (i.e. knocking doors in low-income neighborhoods, tabling at community events, etc.). They do mention speaking with churches and community organizations – but is this just leadership or is it members/those served by these programs?

-With the size of the school, why are they choosing not to participate in the National School Lunch Program?

-How will they navigate sensitive conversations with families about lunch or transportation if there is a language barrier?

-The application mentions lunches, but what about breakfast and snacks? -- particularly with their extended school day and serving elementary school students? – what about if the students are coming early or staying later for tutoring? Lack of on-site meals provided will be a real barrier for families with ED children enrolling their students.

-Will the cluster bus stops only operate for school day times? Will there be transportation at cluster stops to allow children to attend in the summer and the out-of-school time tutoring during the school year?

-Are there any conflicts of interest in having contractors (i.e. ImplementEd, LLC/Craig Tucker) serve on Advisory Council?

Section V – Budget, Budget Narrative, and Logic Model

- Budget outlines complete, realistic, and viable costs for the duration of the grant period.
- Detailed budget narrative clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant period, as well as a plan that demonstrates financial viability beyond the expiration of the grant period.
- All operational costs and major expenditures are accounted for and are realistic.
- There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students.
- Logic Model clearly demonstrates how actions and expenditures are expected to lead to specific outcomes.

Points Possible:	30	Points Earned:	30
Overall Strengths:			
Very detailed budget narrative that is tied to discussion of activities under the grant in the application narrative. Additional detail / supporting documentation provided in appendices.			
Overall Weaknesses/Areas of Concern:			

Section VI – Competitive Preference Standards

- The applicant may receive up to three (3) points for each competitive preference standard.
- The applicant should provide evidence in the application narrative and appendices.

Opening, expanding, or replicating a school in a rural or underserved urban area (i.e. without a high-quality school within fifteen (15) miles).			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	3
Notes (if applicable):			

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Develop or manage a charter school focused on dropout recovery and academic reentry.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Section VII – Priority Consideration Status

- The applicant meets the requirements for the following priority consideration criteria:

Priority Consideration Criteria:	Criteria Met:
Currently serve a forty percent (40%) or higher economically disadvantaged population.	<input type="checkbox"/> Yes X <input checked="" type="checkbox"/> No
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	<input type="checkbox"/> Yes X <input checked="" type="checkbox"/> No
As evidence of participation in applicable federal programs, have Title I status.	<input type="checkbox"/> Yes X <input checked="" type="checkbox"/> No
Maintained an “A” or “A+NG” SPG, as determined by the NCDPI, and met or exceeded growth, as determined by EVAAS, for three consecutive years prior to the application.	<input type="checkbox"/> Yes X <input checked="" type="checkbox"/> No
Priority Consideration Status Total (number of criteria met above):	0

Section VIII – Certification

Status:	Complete X <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Summary

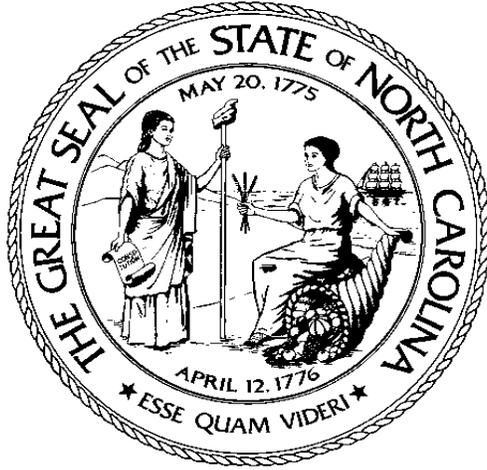
- Please complete the summary tables below with the final ratings from each section above:

General Standards	Status
Section I – Application Contact Information	X <input type="checkbox"/> Met <input type="checkbox"/> Not Met
Section II – Assurances	X <input type="checkbox"/> Met <input type="checkbox"/> Not Met
Section VIII – Certification	X <input type="checkbox"/> Met <input type="checkbox"/> Not Met
Total (must meet <i>all</i> standards to pass)	X <input type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Enrollment Projections	10	8
Section IV – Application Narrative	60	40
Section V – Budget, Budget Narrative, and Logic Model	30	30
Section VI – Competitive Preference Standards	Up to 12	3
Total (must receive at least <i>80 points</i> to pass)	100	81

Priority Standards	Standards Possible	Standards Met
Section VII – Priority Consideration Status	4	0

Overall Application Status	Rating
In order to pass, the application must (a) achieve a rating of “Pass” for the General Standards and (b) score at least 80 points on the Technical Standards. The Priority Standards will be used to determine priority if there are more eligible applications than available awards.	<input type="checkbox"/> Pass with Priority
	X <input type="checkbox"/> Pass
	<input type="checkbox"/> Fail



**North Carolina Advancing Charter Collaboration
and Excellence for Student Success (NC ACCESS) Program
Subgrant Application Rubric**

Applicant: **TeamCFA: Bonnie Cone Classical Academy**

Reviewer Name: **Jay Whalen**

Overview of the NC ACCESS Subgrant Program

In 2018, the North Carolina Department of Public Instruction (NCDPI) was awarded a Public Charter Schools Program (CSP) grant from the U.S. Department of Education (USDOE) of approximately \$26,600,000. The CSP grant will be used to implement the North Carolina Advancing Charter Collaboration and Excellence for Student Success (NC ACCESS) Program to:

1. Increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students;
2. Develop a cohort of 100 charter school leaders who can develop and demonstrate best practices in serving educationally disadvantaged students; and
3. Broadly disseminate best practices in serving educationally disadvantaged students and foster collaboration in the charter school community and between charter schools and traditional public schools.

The NC ACCESS Program and CSP define educationally disadvantaged students as students who are economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

The NC ACCESS program has allocated the majority of the CSP funds to advance Priority 1 listed above through school-level subgrants, though subgrant recipients must also demonstrate a desire to share best practices with both charter schools and traditional public schools. For each of the five (5) years of the federal CSP award, the NC ACCESS Program will run a competitive subgrant competition and award subgrants to North Carolina charter schools that propose a comprehensive plan to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students.

Ratings and Criteria

The NC ACCESS Subgrant Program is a competitive application process designed to award funding for schools that propose to serve an increased number of educationally disadvantaged students. Each subgrant application will be reviewed by a team of NC ACCESS Program team members and external evaluators. All evaluations will be considered, and a recommendation will be made to the Charter School Advisory Board (CSAB). The CSAB will take all recommendations, application reviews, and due diligence into account and make a recommendation for the approval of subgrants to the State Board of Education (State Board). The State Board will determine the final approval of all subgrant awards.

A subgrant application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to successfully implement the proposed plans to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students. In addition to meeting the criteria that are specific to each section, each part of the proposal should align with the overall mission, budget, and goals of the application and NC ACCESS Program.

Recommendations for approval or denial will be based on the completed application which includes school information, signed assurances, enrollment projections, application narrative, budget, budget narrative, logic model, and appendices. The enrollment projections, application narrative, budget, budget

narrative, and logic model are scored out of a possible 100 points. Applicants must score at least 80 points to meet the standard.

Applications that do not meet standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

Instructions for Reviewers

Reviewers should complete each rubric section based on the evidence provided in the application. There are eight (8) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Enrollment Projections
- IV. Application Narrative (no more than fifteen (15) pages)
 - a. If applicable, a school closure plan (no more than five (5) pages)
- V. Budget, Budget Narrative, and Logic Model (no more than five (5) pages)
- VI. Competitive Preference Standards (optional)
- VII. Priority Consideration Status
- VIII. Certification

Please note that there may be appendices to support information provided in the above sections. When evaluating an application, reviewers should both rate each section and provide comments, if applicable. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for educationally disadvantaged students. Responses should clearly align with the mission, goals, and budget of the proposed plan. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving educationally disadvantaged students. Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses/areas of concern of each section of the application. The comments and evidence provided are as significant as the rating. Below are examples of specific and detailed comments:

Strengths of the application:

- “The plan aligns with the overall mission and goals because...”
- “The education and discipline plans are research based and proven effective with the targeted population of students because...”
- “The lunch program is comparable to the National School Lunch Program and will support an educationally disadvantaged population by...”
- “The marketing plan clearly outlines how the school will recruit and enroll a higher educationally disadvantaged population by...”
- “The budget uses sound assumptions and is consistent with the goals of the proposed plan.”

Weaknesses/areas of concern of the application:

- “The curriculum and school calendar do not align with the mission and goals because . . .”
- “The discipline plan does not include provisions for students with disabilities.”
- “The budget assumptions include the unallowable use of funds for construction.”
- “The plan proposes two buses, but there is no accompanying line item in the budget that allocates funds for purchasing buses.”

Applicant: TeamCFA: Bonnie Cone Classical Academy

Once all eight (8) rating sections are scored individually, the applicant should complete the summary ratings page with all final ratings and scores. In order to pass the review, applicants must (a) meet all criteria in sections (I), (II), and (VIII); and (b) score at least 80 combined points between sections (III), (IV), (V), and (VI). Section (VII) will be used to determine priority if there are more eligible applications than subgrant awards. The CSAB will make a final recommendation to the State Board on subgrant awards. The State Board will determine the final approval of all subgrant awards.

**Please remember that all documents, including your individual review, may at some time be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

- All applicant contact information is complete and accurate.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section II – Assurances

- Assurances are signed.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section III – Enrollment Projections

- Enrollment projections are complete, ambitious, and realistic.
- Enrollment projections demonstrate a significant increase of educationally disadvantaged students, including economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

Points Possible:	10	Points Earned:	10
Overall Strengths:			
<ul style="list-style-type: none"> • The applicant is proposing a 45% ED student population by year 5. • They are proposing an additional 25% ED population compared to original enrollment projections. • This school will have a higher ED percentage than other local charter schools and some of the local traditional public schools. 			
Overall Weaknesses/Areas of Concern:			

Section IV – Application Narrative (*see subgrant application for full list of narrative questions)

- Clear rationale for how the projected enrollment figures are ambitious and feasible, including the implementation of a weighted lottery.
- Detailed description of how the educational program, school calendar, and professional development plans are specifically tailored to meet the needs of educationally disadvantaged students.
- At least three (3) school-specific SMART goals are provided to support the proposed plan.
- Clear explanation of how the charter school’s education plan compares to or differs from that of the local LEA(s).
- General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.
- Clear description of the strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.
- Detailed description of the roles and responsibilities of the applicant, partner organizations, and CMO/EMO, including the administrative and contractual roles and responsibilities of such partners.
- Detailed plan for how the governing board will contribute to the recruitment and development of educationally disadvantaged students.
- Clear vision for the school’s climate philosophy and a comprehensive discipline plan that supports the development of educationally disadvantaged students.
- Detailed marketing and recruiting plan is described, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students.
- Clear and comprehensive transportation and school lunch plans are provided.
- A coherent plan to implement the parent/community advisory council.
- If applicable, detailed plans for forming a Student Transition Committee and a clear and specific Student Transition Plan.

Points Possible:	60	Points Earned:	47
Overall Strengths:			
<ul style="list-style-type: none"> • A clear rationale for the enrollment projections is outlined. • The proposed plan has a heavy focus on professional development and training for teachers. • The SMART goals stated are clear and measurable. • The applicant is proposing a tutoring program, but specifically outlines that they will not pay teachers to tutor, therefore making this an allowable expense. • There is a clear commitment to collaboration across charters and other traditional public schools. • The development of a summer program, in addition to an extended school day, will support ED students during break and avoid learning loss. 			
Overall Weaknesses/Areas of Concern:			
<ul style="list-style-type: none"> • Though the applicant will implement a weighted lottery, the applicant does not outline what percentage of seats will be set aside for ED students. • The school culture and discipline plan could have used more detail on how they would specifically support ED students. • The applicant may consider the NSLP, but is not outline a clear, comprehensive school lunch plan. 			

- The marketing and recruitment plan outlines hiring a consultant but does not speak to specific strategies to target ED students.
- It is unclear if 2 buses will be sufficient to support transportation for a population of over 400 ED students by year 5. This is the same amount of buses as the applicant's other NC ACCESS application, but for over 200 additional students and 100 more ED students. Why is this sufficient (and the same) for such varying populations sizes?

Section V – Budget, Budget Narrative, and Logic Model

- Budget outlines complete, realistic, and viable costs for the duration of the grant period.
- Detailed budget narrative clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant period, as well as a plan that demonstrates financial viability beyond the expiration of the grant period.
- All operational costs and major expenditures are accounted for and are realistic.
- There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students.
- Logic Model clearly demonstrates how actions and expenditures are expected to lead to specific outcomes.

Points Possible:	30	Points Earned:	28
Overall Strengths:			
<ul style="list-style-type: none"> • The budget is clear and is targeted to the first 2 years of operations. • There is a heavy focus on instruction materials and professional development. • Line items are specific and aligned to the applicant’s goals and activities. 			
Overall Weaknesses/Areas of Concern:			
<ul style="list-style-type: none"> • Sustainability beyond the expiration of the grant is not specifically articulated. 			

Section VI – Competitive Preference Standards

- The applicant may receive up to three (3) points for each competitive preference standard.
- The applicant should provide evidence in the application narrative and appendices.

Opening, expanding, or replicating a school in a rural or underserved urban area (i.e. without a high-quality school within fifteen (15) miles).			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	2
Notes (if applicable):			
<ul style="list-style-type: none"> • While the applicant outlined marketing strategies to target a diverse student body, they plan could be more specific and target area demographics could have been provided to determine the viability of the plan 			

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Develop or manage a charter school focused on dropout recovery and academic reentry.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Section VII – Priority Consideration Status

- The applicant meets the requirements for the following priority consideration criteria:

Priority Consideration Criteria:	Criteria Met:
Currently serve a forty percent (40%) or higher economically disadvantaged population.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	<input type="checkbox"/> Yes <input type="checkbox"/> No
As evidence of participation in applicable federal programs, have Title I status.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Maintained an “A” or “A+NG” SPG, as determined by the NCDPI, and met or exceeded growth, as determined by EVAAS, for three consecutive years prior to the application.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Priority Consideration Status Total (number of criteria met above):	N/A

Section VIII – Certification

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Summary

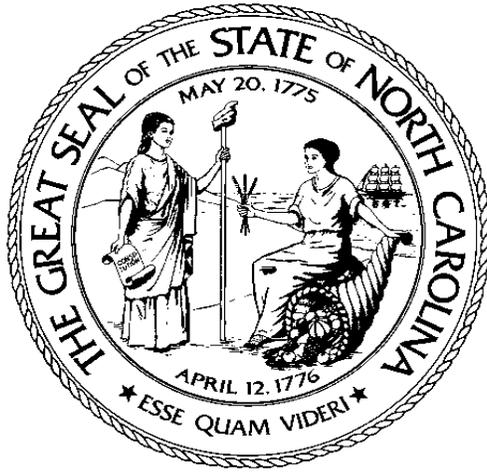
- Please complete the summary tables below with the final ratings from each section above:

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section II – Assurances	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section VIII – Certification	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Total (must meet <i>all</i> standards to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Enrollment Projections	10	10
Section IV – Application Narrative	60	47
Section V – Budget, Budget Narrative, and Logic Model	30	28
Section VI – Competitive Preference Standards	Up to 12	2
Total (must receive at least <i>80 points</i> to pass)	100	87

Priority Standards	Standards Possible	Standards Met
Section VII – Priority Consideration Status	4	N/A

Overall Application Status	Rating
In order to pass, the application must (a) achieve a rating of “Pass” for the General Standards and (b) score at least 80 points on the Technical Standards. The Priority Standards will be used to determine priority if there are more eligible applications than available awards.	<input type="checkbox"/> Pass with Priority
	<input checked="" type="checkbox"/> Pass
	<input type="checkbox"/> Fail



**North Carolina Advancing Charter Collaboration
and Excellence for Student Success (NC ACCESS) Program
Subgrant Application Rubric**

Applicant: **Bonnie Cone Classical Academy**

Reviewer Name: **Elaina Sabatine**

Overview of the NC ACCESS Subgrant Program

In 2018, the North Carolina Department of Public Instruction (NCDPI) was awarded a Public Charter Schools Program (CSP) grant from the U.S. Department of Education (USDOE) of approximately \$26,600,000. The CSP grant will be used to implement the North Carolina Advancing Charter Collaboration and Excellence for Student Success (NC ACCESS) Program to:

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2. Develop a cohort of 100 charter school leaders who can develop and demonstrate best practices in serving educationally disadvantaged students; and
3. Broadly disseminate best practices in serving educationally disadvantaged students and foster collaboration in the charter school community and between charter schools and traditional public schools.

The NC ACCESS Program and CSP define educationally disadvantaged students as students who are economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

The NC ACCESS program has allocated the majority of the CSP funds to advance Priority 1 listed above through school-level subgrants, though subgrant recipients must also demonstrate a desire to share best practices with both charter schools and traditional public schools. For each of the five (5) years of the federal CSP award, the NC ACCESS Program will run a competitive subgrant competition and award subgrants to North Carolina charter schools that propose a comprehensive plan to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students.

Ratings and Criteria

The NC ACCESS Subgrant Program is a competitive application process designed to award funding for schools that propose to serve an increased number of educationally disadvantaged students. Each subgrant application will be reviewed by a team of NC ACCESS Program team members and external evaluators. All evaluations will be considered, and a recommendation will be made to the Charter School Advisory Board (CSAB). The CSAB will take all recommendations, application reviews, and due diligence into account and make a recommendation for the approval of subgrants to the State Board of Education (State Board). The State Board will determine the final approval of all subgrant awards.

A subgrant application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to successfully implement the proposed plans to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students. In addition to meeting the criteria that are specific to each section, each part of the proposal should align with the overall mission, budget, and goals of the application and NC ACCESS Program.

Recommendations for approval or denial will be based on the completed application which includes school information, signed assurances, enrollment projections, application narrative, budget, budget narrative, logic model, and appendices. The enrollment projections, application narrative, budget, budget

narrative, and logic model are scored out of a possible 100 points. Applicants must score at least 80 points to meet the standard.

Applications that do not meet standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

Instructions for Reviewers

Reviewers should complete each rubric section based on the evidence provided in the application. There are eight (8) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
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- IV. Application Narrative (no more than fifteen (15) pages)
 - a. If applicable, a school closure plan (no more than five (5) pages)
- V. Budget, Budget Narrative, and Logic Model (no more than five (5) pages)
- VI. Competitive Preference Standards (optional)
- VII. Priority Consideration Status
- VIII. Certification

Please note that there may be appendices to support information provided in the above sections. When evaluating an application, reviewers should both rate each section and provide comments, if applicable. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for educationally disadvantaged students. Responses should clearly align with the mission, goals, and budget of the proposed plan. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving educationally disadvantaged students. Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses/areas of concern of each section of the application. The comments and evidence provided are as significant as the rating. Below are examples of specific and detailed comments:

Strengths of the application:

- “The plan aligns with the overall mission and goals because...”
- “The education and discipline plans are research based and proven effective with the targeted population of students because...”
- “The lunch program is comparable to the National School Lunch Program and will support an educationally disadvantaged population by...”
- “The marketing plan clearly outlines how the school will recruit and enroll a higher educationally disadvantaged population by...”
- “The budget uses sound assumptions and is consistent with the goals of the proposed plan.”

Weaknesses/areas of concern of the application:

- “The curriculum and school calendar do not align with the mission and goals because . . .”
- “The discipline plan does not include provisions for students with disabilities.”
- “The budget assumptions include the unallowable use of funds for construction.”
- “The plan proposes two buses, but there is no accompanying line item in the budget that allocates funds for purchasing buses.”

Applicant:

Once all eight (8) rating sections are scored individually, the applicant should complete the summary ratings page with all final ratings and scores. In order to pass the review, applicants must (a) meet all criteria in sections (I), (II), and (VIII); and (b) score at least 80 combined points between sections (III), (IV), (V), and (VI). Section (VII) will be used to determine priority if there are more eligible applications than subgrant awards. The CSAB will make a final recommendation to the State Board on subgrant awards. The State Board will determine the final approval of all subgrant awards.

**Please remember that all documents, including your individual review, may at some time be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

- All applicant contact information is complete and accurate.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section II – Assurances

- Assurances are signed.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section III – Enrollment Projections

- Enrollment projections are complete, ambitious, and realistic.
- Enrollment projections demonstrate a significant increase of educationally disadvantaged students, including economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

Points Possible:	10	Points Earned:	10
Overall Strengths:			
Ambitions to serve a student population that has a high percentage of ED students.			
Overall Weaknesses/Areas of Concern:			
Lacks detail on how the lottery will be weighted.			

Section IV – Application Narrative (*see subgrant application for full list of narrative questions)

- Clear rationale for how the projected enrollment figures are ambitious and feasible, including the implementation of a weighted lottery.
- Detailed description of how the educational program, school calendar, and professional development plans are specifically tailored to meet the needs of educationally disadvantaged students.
- At least three (3) school-specific SMART goals are provided to support the proposed plan.
- Clear explanation of how the charter school’s education plan compares to or differs from that of the local LEA(s).
- General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.
- Clear description of the strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.
- Detailed description of the roles and responsibilities of the applicant, partner organizations, and CMO/EMO, including the administrative and contractual roles and responsibilities of such partners.
- Detailed plan for how the governing board will contribute to the recruitment and development of educationally disadvantaged students.
- Clear vision for the school’s climate philosophy and a comprehensive discipline plan that supports the development of educationally disadvantaged students.
- Detailed marketing and recruiting plan is described, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students.
- Clear and comprehensive transportation and school lunch plans are provided.
- A coherent plan to implement the parent/community advisory council.
- If applicable, detailed plans for forming a Student Transition Committee and a clear and specific Student Transition Plan.

Points Possible:	60	Points Earned:	50
Overall Strengths:			
<p>Strong use of data.</p> <p>The inclusion of a research plan demonstrates a strong commitment to program evaluation and to monitoring impact.</p> <p>They’ve identified several strong partnerships to support their work (e.g., Kenan Fellows).</p> <p>Partnership with Kenan Fellows provides more targeted development for teachers.</p> <p>Professional development plan is detailed and makes clear teachers will have ample opportunity for training.</p> <p>Closure plan is comprehensive and thorough.</p>			
Overall Weaknesses/Areas of Concern:			
<p>The description of discipline procedures and climate is vague, although the addition of a mental health practitioner is positive.</p>			

Applicant:

Transportation and lunch plans lack detail, particularly around how students will be served if they demonstrate need.

Section V – Budget, Budget Narrative, and Logic Model

- Budget outlines complete, realistic, and viable costs for the duration of the grant period.
- Detailed budget narrative clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant period, as well as a plan that demonstrates financial viability beyond the expiration of the grant period.
- All operational costs and major expenditures are accounted for and are realistic.
- There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students.
- Logic Model clearly demonstrates how actions and expenditures are expected to lead to specific outcomes.

Points Possible:	30	Points Earned:	30
Overall Strengths:			
Budget is detailed and maps directly onto narrative.			
In the appendices, they also have provided scope of work documentation that aligns with allowances for personnel listed in the budget.			
Logic model has a strong focus on serving ED students.			
Overall Weaknesses/Areas of Concern:			

Section VI – Competitive Preference Standards

- The applicant may receive up to three (3) points for each competitive preference standard.
- The applicant should provide evidence in the application narrative and appendices.

Opening, expanding, or replicating a school in a rural or underserved urban area (i.e. without a high-quality school within fifteen (15) miles).			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	3
Notes (if applicable):			

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Develop or manage a charter school focused on dropout recovery and academic reentry.			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Section VII – Priority Consideration Status

- The applicant meets the requirements for the following priority consideration criteria:

Priority Consideration Criteria:	Criteria Met:
Currently serve a forty percent (40%) or higher economically disadvantaged population.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
As evidence of participation in applicable federal programs, have Title I status.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Maintained an “A” or “A+NG” SPG, as determined by the NCDPI, and met or exceeded growth, as determined by EVAAS, for three consecutive years prior to the application.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Priority Consideration Status Total (number of criteria met above):	0

Section VIII – Certification

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Summary

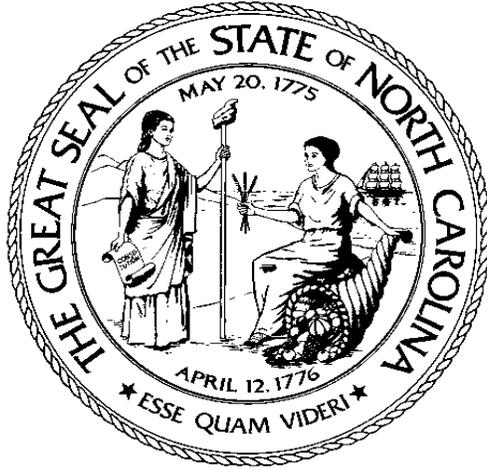
- Please complete the summary tables below with the final ratings from each section above:

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section II – Assurances	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section VIII – Certification	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Total (must meet <i>all</i> standards to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Enrollment Projections	10	10
Section IV – Application Narrative	60	50
Section V – Budget, Budget Narrative, and Logic Model	30	30
Section VI – Competitive Preference Standards	Up to 12	3
Total (must receive at least <i>80</i> points to pass)	100	93

Priority Standards	Standards Possible	Standards Met
Section VII – Priority Consideration Status	4	0

Overall Application Status	Rating
In order to pass, the application must (a) achieve a rating of “Pass” for the General Standards and (b) score at least 80 points on the Technical Standards. The Priority Standards will be used to determine priority if there are more eligible applications than available awards.	<input type="checkbox"/> Pass with Priority
	<input checked="" type="checkbox"/> Pass
	<input type="checkbox"/> Fail



**North Carolina Advancing Charter Collaboration
and Excellence for Student Success (NC ACCESS) Program
Subgrant Application Rubric**

Applicant: **TEAMCFA: Bonnie Cone Classical**

Reviewer Name: **Barbara O'Neal**

Overview of the NC ACCESS Subgrant Program

In 2018, the North Carolina Department of Public Instruction (NCDPI) was awarded a Public Charter Schools Program (CSP) grant from the U.S. Department of Education (USDOE) of approximately \$26,600,000. The CSP grant will be used to implement the North Carolina Advancing Charter Collaboration and Excellence for Student Success (NC ACCESS) Program to:

1. Increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students;
2. Develop a cohort of 100 charter school leaders who can develop and demonstrate best practices in serving educationally disadvantaged students; and
3. Broadly disseminate best practices in serving educationally disadvantaged students and foster collaboration in the charter school community and between charter schools and traditional public schools.

The NC ACCESS Program and CSP define educationally disadvantaged students as students who are economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

The NC ACCESS program has allocated the majority of the CSP funds to advance Priority 1 listed above through school-level subgrants, though subgrant recipients must also demonstrate a desire to share best practices with both charter schools and traditional public schools. For each of the five (5) years of the federal CSP award, the NC ACCESS Program will run a competitive subgrant competition and award subgrants to North Carolina charter schools that propose a comprehensive plan to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students.

Ratings and Criteria

The NC ACCESS Subgrant Program is a competitive application process designed to award funding for schools that propose to serve an increased number of educationally disadvantaged students. Each subgrant application will be reviewed by a team of NC ACCESS Program team members and external evaluators. All evaluations will be considered, and a recommendation will be made to the Charter School Advisory Board (CSAB). The CSAB will take all recommendations, application reviews, and due diligence into account and make a recommendation for the approval of subgrants to the State Board of Education (State Board). The State Board will determine the final approval of all subgrant awards.

A subgrant application that merits a recommendation for approval should present a clear, realistic picture of how the school expects to successfully implement the proposed plans to increase the number of educationally disadvantaged students attending high quality charter schools and expand the number of high quality charter schools available to educationally disadvantaged students. In addition to meeting the criteria that are specific to each section, each part of the proposal should align with the overall mission, budget, and goals of the application and NC ACCESS Program.

Recommendations for approval or denial will be based on the completed application which includes school information, signed assurances, enrollment projections, application narrative, budget, budget narrative, logic model, and appendices. The enrollment projections, application narrative, budget, budget

narrative, and logic model are scored out of a possible 100 points. Applicants must score at least 80 points to meet the standard.

Applications that do not meet standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

Instructions for Reviewers

Reviewers should complete each rubric section based on the evidence provided in the application. There are eight (8) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Enrollment Projections
- IV. Application Narrative (no more than fifteen (15) pages)
 - a. If applicable, a school closure plan (no more than five (5) pages)
- V. Budget, Budget Narrative, and Logic Model (no more than five (5) pages)
- VI. Competitive Preference Standards (optional)
- VII. Priority Consideration Status
- VIII. Certification

Please note that there may be appendices to support information provided in the above sections. When evaluating an application, reviewers should both rate each section and provide comments, if applicable. Reviewers should look for responses that reflect a thorough understanding of key issues and barriers for educationally disadvantaged students. Responses should clearly align with the mission, goals, and budget of the proposed plan. Each response should include specific and accurate information that shows thorough preparation and understanding of school operations and serving educationally disadvantaged students. Reviewers should use objective language and complete sentences in their comments on the strengths and weaknesses/areas of concern of each section of the application. The comments and evidence provided are as significant as the rating. Below are examples of specific and detailed comments:

Strengths of the application:

- “The plan aligns with the overall mission and goals because...”
- “The education and discipline plans are research based and proven effective with the targeted population of students because...”
- “The lunch program is comparable to the National School Lunch Program and will support an educationally disadvantaged population by...”
- “The marketing plan clearly outlines how the school will recruit and enroll a higher educationally disadvantaged population by...”
- “The budget uses sound assumptions and is consistent with the goals of the proposed plan.”

Weaknesses/areas of concern of the application:

- “The curriculum and school calendar do not align with the mission and goals because . . .”
- “The discipline plan does not include provisions for students with disabilities.”
- “The budget assumptions include the unallowable use of funds for construction.”
- “The plan proposes two buses, but there is no accompanying line item in the budget that allocates funds for purchasing buses.”

Applicant:

Once all eight (8) rating sections are scored individually, the applicant should complete the summary ratings page with all final ratings and scores. In order to pass the review, applicants must (a) meet all criteria in sections (I), (II), and (VIII); and (b) score at least 80 combined points between sections (III), (IV), (V), and (VI). Section (VII) will be used to determine priority if there are more eligible applications than subgrant awards. The CSAB will make a final recommendation to the State Board on subgrant awards. The State Board will determine the final approval of all subgrant awards.

**Please remember that all documents, including your individual review, may at some time be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

- All applicant contact information is complete and accurate.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section II – Assurances

- Assurances are signed.

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Section III – Enrollment Projections

- Enrollment projections are complete, ambitious, and realistic.
- Enrollment projections demonstrate a significant increase of educationally disadvantaged students, including economically disadvantaged, homeless or unaccompanied youth, English learners, and students with disabilities.

Points Possible:	10	Points Earned:	10
Overall Strengths:			
<p>The applicant indicated they are committed to identifying and removing any barriers that may prevent any student or family, especially those who may have circumstances that indicate an educational disadvantage (ED), from enrolling in the school. The applicant provided a clear rationale for the enrollment projections for ED students as well as indicated that the implementation of a weighted lottery is an initial and critical step toward increasing the number of ED students who enroll in the school. The</p>			
Overall Weaknesses/Areas of Concern:			
<p>No weaknesses noted.</p>			

Section IV – Application Narrative (*see subgrant application for full list of narrative questions)

- Clear rationale for how the projected enrollment figures are ambitious and feasible, including the implementation of a weighted lottery.
- Detailed description of how the educational program, school calendar, and professional development plans are specifically tailored to meet the needs of educationally disadvantaged students.
- At least three (3) school-specific SMART goals are provided to support the proposed plan.
- Clear explanation of how the charter school’s education plan compares to or differs from that of the local LEA(s).
- General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.
- Clear description of the strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.
- Detailed description of the roles and responsibilities of the applicant, partner organizations, and CMO/EMO, including the administrative and contractual roles and responsibilities of such partners.
- Detailed plan for how the governing board will contribute to the recruitment and development of educationally disadvantaged students.
- Clear vision for the school’s climate philosophy and a comprehensive discipline plan that supports the development of educationally disadvantaged students.
- Detailed marketing and recruiting plan is described, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students.
- Clear and comprehensive transportation and school lunch plans are provided.
- A coherent plan to implement the parent/community advisory council.
- If applicable, detailed plans for forming a Student Transition Committee and a clear and specific Student Transition Plan.

Points Possible:	60	Points Earned:	58
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Overall Strengths:

The applicant clearly demonstrated that the proposed charter school’s education plan and curriculum are research based and proven effective with the targeted population of students. The applicant provided a clear and strong focus on the use of the Core Knowledge curriculum. As part of CKLA, students in grades K-3 will start to develop their reading, writing and vocabulary through two integrated strands: “Skills” and “Listening and Learning.” CKLA in grades 4-6 will build on this foundational knowledge through the exploration of content-specific units, which will further expand students’ reading, writing and vocabulary knowledge. The ultimate goal is that this scaffolding will enable students to transition their prior knowledge and experience to current, real-world applications. Extensive information on the Core Knowledge and CKLA curriculum, including supporting research, is provided by the Core Knowledge Foundation.

The applicant will operate on a traditional calendar. However, to address any deficiencies, the school will leverage subgrant funds to develop a curriculum that will support an extended learning curriculum to increase the impact of the school’s curriculum. Before, after, and Saturday school tutoring opportunities will provide additional instructional time for ED students. The school also boasts a longer school day (8:00 AM – 4:00 PM) which allows for embedded tutoring opportunities.

The applicant provided a clear rationale for the enrollment projections for ED students as well as indicated that the implementation of a weighted lottery is an initial and critical step toward increasing the number of ED students who enroll in the school. The applicant referenced the ED student population in the area as evidenced by the economically disadvantaged population served in the local traditional public schools. The projected enrollment numbers are ambitious in that they exceed the number of ED students currently being served by charter schools in the immediate area of the school.

The applicant referenced their commitment to provide transportation and lunch. They plan to work with any student and family facing a low-income circumstance to ensure that transportation and access to lunch are not an obstacle to their enrollment. For example, the school is planning to purchase or lease two (2) buses and offer cluster bus stops and has started marketing efforts to make the availability of transportation known to all new families

Overall Weaknesses/Areas of Concern:

The applicant did not provide targets for the weighted lottery.

The applicant currently does not plan to participate in the National School Lunch Program (NSLP); however, the school is pursuing a comprehensive lunch program through which ED students will have access to a hot meal on a free or reduced rate based on demonstrated economic need. More detail was necessary to determine the full viability of the lunch program.

The school culture and discipline plan could have used more detail on how they would specifically support ED students.

Section V – Budget, Budget Narrative, and Logic Model

- Budget outlines complete, realistic, and viable costs for the duration of the grant period.
- Detailed budget narrative clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant period, as well as a plan that demonstrates financial viability beyond the expiration of the grant period.
- All operational costs and major expenditures are accounted for and are realistic.
- There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students.
- Logic Model clearly demonstrates how actions and expenditures are expected to lead to specific outcomes.

Points Possible:	30	Points Earned:	28
Overall Strengths:			
The budget was reasonable and reflected the cost to meet the goals and objectives.			
Overall Weaknesses/Areas of Concern:			

Section VI – Competitive Preference Standards

- The applicant may receive up to three (3) points for each competitive preference standard.
- The applicant should provide evidence in the application narrative and appendices.

Opening, expanding, or replicating a school in a rural or underserved urban area (i.e. without a high-quality school within fifteen (15) miles).			
Points Possible:	3	Points Earned:	0
Notes (if applicable):			

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	03
Notes (if applicable):			

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	
Notes (if applicable):			

Develop or manage a charter school focused on dropout recovery and academic reentry.			
Points Possible:	3	Points Earned:	
Notes (if applicable):			

Section VII – Priority Consideration Status

- The applicant meets the requirements for the following priority consideration criteria:

Priority Consideration Criteria:	Criteria Met:
Currently serve a forty percent (40%) or higher economically disadvantaged population.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	<input type="checkbox"/> Yes <input type="checkbox"/> No
As evidence of participation in applicable federal programs, have Title I status.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Maintained an “A” or “A+NG” SPG, as determined by the NCDPI, and met or exceeded growth, as determined by EVAAS, for three consecutive years prior to the application.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Priority Consideration Status Total (number of criteria met above):	

Section VIII – Certification

Status:	Complete <input checked="" type="checkbox"/>	Incomplete <input type="checkbox"/>
Notes (if applicable):		

Summary

- Please complete the summary tables below with the final ratings from each section above:

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section II – Assurances	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Section VIII – Certification	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met
Total (must meet <i>all</i> standards to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Enrollment Projections	10	10
Section IV – Application Narrative	60	55
Section V – Budget, Budget Narrative, and Logic Model	30	28
Section VI – Competitive Preference Standards	Up to 12	3
Total (must receive at least <i>80 points</i> to pass)	100	96

Priority Standards	Standards Possible	Standards Met
Section VII – Priority Consideration Status	4	N/A

Overall Application Status	Rating
In order to pass, the application must (a) achieve a rating of “Pass” for the General Standards and (b) score at least 80 points on the Technical Standards. The Priority Standards will be used to determine priority if there are more eligible applications than available awards.	<input type="checkbox"/> Pass with Priority
	<input checked="" type="checkbox"/> Pass
	<input type="checkbox"/> Fail