



NC ACCESS Subgrant Program Application Recommendation
Cardinal Charter Academy at Wendell Falls
June 8, 2020

Introduction

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 \$36,600,000. The CSP grant is being 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 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. The NC ACCESS Program will run a competitive subgrant application process annually 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 enrollment and funding request. (p. 4)
4. Summary of the Evaluation: A summary of the overall 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 <https://www.dpi.nc.gov/students-families/innovative-school-options/charter-schools/nc-access-program>

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 Cardinal Charter Academy at Wendell Falls was evaluated by a Review Committee consisting of the following individuals:

Evaluator	Role
Dr. Drew Polly	External Evaluator
Connie Cuttino	External Evaluator
Dr. Danielle Allen	External Evaluator

All evaluations have been considered, and the recommendation made to the Charter School Advisory Board (CSAB) is based on the 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 that are specific to each section, each part of the proposal should align with the overall mission, budget, and goals of the subgrant application and NC ACCESS Program.

Recommendations for approval or denial are based on the completed application which includes school information, signed assurances, enrollment projections, education plan, operations plan, budget, budget narrative, logic model, and appendices. The enrollment projections, education plan, operations plan, 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 the standard in all sections as evidenced by the summary review ratings will be deemed not ready for approval.

² <https://files.nc.gov/dpi/documents/charterschools/ncaccess/scoring-rubric.docx>

Procedural History

The following outlines the steps completed by Cardinal Charter Academy at Wendell Falls (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 prior to the deadline on January 15, 2020 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.³
3. The CSAB was notified of the Applicant’s eligibility status via emailed report on January 27, 2020.
4. The Applicant submitted a full subgrant application in Epicenter prior to the deadline on March 1, 2020.⁴
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

Cardinal Charter Academy at Wendell Falls submitted an application for an Implementation Only subgrant for implementation beginning in the 2020-2021 school year. The application and evaluation summaries for the subgrant application submitted by Cardinal Charter Academy at Wendell Falls 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 Cardinal Charter Academy at Wendell Falls be awarded an Implementation Only subgrant for the 2020 application cycle.

Subgrant Application for Cardinal Charter Academy at Wendell Falls:	RECOMMENDED FOR APPROVAL
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Dave Machado, Director
Office of Charter Schools

6/8/20

Date

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

Summary of the Application

School Name: Cardinal Charter Academy at Wendell Falls

Location of School: Wake County

CMO/EMO: Charter Schools USA

Subgrant Type: Implementation Only

Projected Enrollment:

Subgrant Year	Grade Levels Served	Total Student Enrollment	Total ED Student Enrollment	ED Enrollment Percentage
2020-2021	K-6	615	93	15%
2021-2022	K-7	690	110	16%
2022-2023	K-8	765	137	18%
2023-2024	K-8	765	153	20%
2024-2025	K-8	765	153	20%

Requested Funding Amount: \$800,000

Recommended Funding Amount: \$300,000⁶

⁶ The NC ACCESS Program reserves the right to recommend less subgrant funding than officially requested by an applicant based on the strength of the application, projected growth, the activities and justifications provided, past academic, operational, and financial performance, and other due diligence. The CSAB and State Board will make recommendations and approvals based the “Recommended Funding Amount”. The NC ACCESS Program will conduct a final budget review with each awarded school and approve all final budgets prior to the reimbursement of any funding.

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 (VII); and (b) score at least eighty (80) combined points between sections (III), (IV), and (V). Section (VI) will be used to determine priority if there are more eligible applications than subgrant awards.”⁷ The review committee’s average rating for each section of the application are as follows:

General Standards	Status
Section I – Application Contact Information	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section II – Assurances	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section VII – Certification	<input type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Total (all sections must be <i>complete</i> to pass)	<input type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Application Narrative (A, B, and C)	70	56
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	24
Section V – Competitive Preference Standards	Up to 12	0
Total (must receive at least <i>80 points</i> to pass)	100	80

Priority Standards	Standards Possible	Standards Met
Section VI – 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 eighty (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

⁷ <https://files.nc.gov/dpi/documents/charterschools/ncaccess/scoring-rubric.docx>

The review committee recommends that the subgrant application for Cardinal Charter Academy at Wendell Falls be approved based on the following evaluation:

Strengths

The applicant plans to focus on the student population residing in and around the Wendell community located in northeast Wake County, which was chosen due to its population growth and lack of school choice in the area.

The Board has an existing agreement with Charter Schools USA to manage the school.

The communication strategy includes an integrated marketing approach; which may include digital advertising, social media, print, radio, television, community outreach and events. Each medium is evaluated based on its reach (how many potential targets will see or use this medium) and frequency (how often potential targets will see/read/hear the message), as well as its likelihood to drive traffic. Digital advertising will be utilized to reach out to the target demographics.

The school will contract with a national food service vendor to provide breakfast and lunch. The food vendor will provide a quality meal program. The school will continue to serve free and reduced meals to students who would have otherwise qualified under NSLP regulations.

Weaknesses

The applicant does outline its specific plans for a weighted lottery or how it will ensure the recruitment and retention of a diverse staff.

The applicant lacked a robust transportation plan. One bus has been included in the budget for transportation at an average rate of \$300 per day for year one. A 2% increase has been budgeted each year thereafter.

Further clarification is needed on the operations of the school lunch program.

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

January 15, 2020

VIA EMAIL

Dana Smith, Assistant Director of Grants
Wendell Falls Charter Academy
11408 Lostwood Lane
Raleigh, NC 27614
dsmith@charterschoolsusa.com

Dear Ms. Smith,

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, Wendell Falls Charter Academy has been designated as eligible to apply for an Implementation Only subgrant for implementation beginning in the 2020-2021 school year. The Charter Schools Advisory Board (CSAB) will be notified of the eligibility status of all applicants on February 10, 2020.

Due to Wendell Falls Charter Academy's designation as eligible, Wendell Falls Charter Academy may move forward and submit the full subgrant application. As a reminder, completed applications are **due in Epicenter by 5:00pm (EST) on March 1, 2020**. 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) 807-3981 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) 807-3981

Exhibit B: NC ACCESS Program Subgrant Application

SUBGRANT APPLICATION

I. APPLICATION CONTACT INFORMATION

Charter School Information			
Name of charter school (Approved/Existing): Cardinal Charter Academy at Wendell Falls			
Mailing address (Street, City, State, Zip): 6041 Taylor Rd. Wendall Falls, NC 27591			
Name of non-profit organization under which charter is/will be organized or operated: Triangle Education Foundation			
Name of contact person: Gina Merrell		Title/Relationship to approved/existing school: Grants Coordinator	
Primary telephone: (707) 631-7434		Alternative telephone:	
E-Mail address: gmerrell1@charterschoolsusa.com		Website (if applicable): https://www.ccawendellfalls.org/	
Name of county and local education agency (LEA) in which charter school is/will reside: County: Wake County LEA: Cardinal Charter Academy at Wendell Falls			
Is or will the charter school be operated by an Education Management Organization (EMO) or Charter Management Organization (CMO): Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>			
If so, please provide the name and list of all schools managed by the organization. Charter Schools USA managed schools: Cabarrus Charter Academy Cardinal Charter Academy Concord Lake STEAM Academy Langtree Charter Academy Iredell Charter Academy Steele Creek Preparatory Academy West Lake Preparatory Academy			
Please indicate the subgrant category for which you are applying:			
Planning and Implementation <input type="checkbox"/>	Implementation Only <input checked="" type="checkbox"/>	Expansion <input type="checkbox"/>	Replication <input type="checkbox"/>

II. ASSURANCES

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

Gina Merrell

Signature of Charter School Authorized Representative

3.1.2020

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.

III. APPLICATION NARRATIVE

In twenty (20) pages or less (single-spaced), please answer the following questions. If some of the information is well-articulated in your approved charter application, you are welcome to refer to the application and attach relevant sections in appendix E to this subgrant application. This application section is worth up to seventy (70) points.

A. Enrollment Projections (10 points)

Provide all projected enrollment estimates for the duration of the subgrant and explain the rationale supporting the enrollment projections. This application section is worth up to ten (10) points.

Subgrant Year	Grade Levels Served	Total Student Enrollment	Number of ED* Students	Percentage of ED* Student Population
2020-2021	K-6	615	93	15
2021-2022	K-7	690	110	16
2022-2023	K-8	765	137	18
2023-2024	K-8	765	153	20
2024-2025	K-8	765	153	20

*Educationally Disadvantaged (ED) includes those who are economically disadvantaged, homeless or unaccompanied youth, English learners, students with disabilities, immigrant students, and migrant students.

A.1 Explain the rationale behind the projected enrollment figures above; specifically, how the projected numbers are both ambitious and feasible. (5 points)

WFCA plans to focus on the student population residing in and around the Wendell community located in northeast Wake County. The bordering county of Johnston is also included in our projected student population. The community of Wendell was chosen due to its population growth and lack of school choice in the area. A new, master-planned community called Wendell Falls is currently being built within Wendell. Once completed, Wendell Falls will encompass approximately 4,000 new homes and over 2 million square feet of commercial space. The developer has carved out a site specifically zoned for a school within Wendell Falls, and they have agreed to hold that site for WFCA until completion of the charter application process.

To project the student body WFCA will serve that is reflective the diversity of the surrounding community, local public and/or charter schools were measured within a 15-minute drive-time of the proposed site, which is located just east of the intersection of Wendell Falls Parkway and Taylor Road. This produced the following estimates:

- * Proposed School Size: 765
- * Minority Population: 54%
- * Free and Reduced Lunch (FRL) Population: 50%
- * English Language Learner (ELL): 8%
- * Exceptional Children (EC) Population: 12%
- * EC Population (Including academically or intellectually gifted (AIG)): 21%

Demographic and population information was obtained through an analysis using Environmental and Social Research Institute (ESRI) mapping software, which is based on current census data and future projections. According to current census data, the community within the 15-minute drive-time mentioned above currently has an average household size of 2.8. This figure indicates that a large portion of the population is comprised of families with school-aged children. The total population within that same area is expected to grow by an average of 2.4% annually between 2018 and 2023,

which is exponentially higher than the state's current growth average of 1.14%. For reference, the US population growth average is currently 0.7%. This rapid growth in the Wendell area is mainly spurred by the development of Wendell Falls. In fact, the population growth is currently projected at 3.5% annually within a 5-minute drive-time of the proposed site.

In addition, an analysis of the public schools that serve grades K-8 within that same drive-time shows that there is only one public school within 5 minutes and only one charter school within 15 minutes. The lack of public schools within the immediate area, compounded with the fact that the average capacity utilization for all public schools that serve grades K-8 within 15 minutes is currently at 99%, will make it very difficult for the existing schools to mitigate the impact of the projected population growth on overcrowding.

Furthermore, academic performance of these schools is below average. No schools within the 15-minute drive-time earned an A for the 2017-18 school year, and only one earned a B (East Wake Academy, a charter school serving grades K-12). Of the remaining public schools within the 15-minute drivetime, one earned an F, ten earned a D, and seven earned a C, which averages to a low C grade for all schools within 15 minutes of our anticipated site.

Currently, families in the community of Wendell lack quality school choice options, and as the population grows and schools become increasingly overcrowded, their choices will only become more limited. WFCA will provide a quality school choice option for the community and its families as well as increase the capacity of the public-school system in the area to help mitigate the impact of the projected rapid population growth.

A.2 Describe how the school plans to implement a weighted lottery. (5 points)

WFCA is committed to providing equitable access to a high quality, technology-rich, personalized learning environment for all students within the school's community. WFCA is also committed to reflecting the makeup of that community within the school as genuinely as possible, which includes enrolling a proportionate amount of Economically Disadvantaged (ED) students. ED students are those students who are classified as eligible to receive free and reduced lunch. According to NC DPI statistics, Wake County Schools averaged approximately 33% of students classified as eligible for receiving free and reduced lunch in 2017-18 according to the National School Lunch Program (NSLP) guidelines. Schools within the 15-minute drive time of the Wendell Falls area had a higher percentage than the LEA average (50%).

Students classified as ED in Wake County Public Schools significantly underperformed the general student population. 39.1% of ED students scored a Level 3 (Grade Level Proficient) compared to 65.8% of the general population. 29.8% of ED students scored a Level 4 or 5 (College and Career Readiness) compared to 57.8% of the general population.

Goal 6 of the State Board of Education Strategic Plan is "to ensure equity of educational opportunity for all students." WFCA will provide an opportunity for academic growth for lower income families by offering a personalized approach of actively integrating the school population and reducing the barriers to enrollment for low-income families. WFCA will encourage enrollment of ED students by offering support for families through participation in the NSLP, transportation assistance, personalized education, and connections to community resources.

The goal of the weighted lottery for WFCAs is to ensure equitable access for students classified as ED using the NSLP guidelines for free and reduced lunch. WFCAs will institute a priority lottery for the remaining available lottery seats (after staff, board, and sibling preferences) in order to achieve 15% of students meeting the ED criteria are reflected in the school population.

With each annual lottery, the principal will identify the number of FRL seats to make available per grade level in order to promote a balance of admitted students across each grade. The number of total openings at each grade level will be reduced based on the number of openings reserved for ED priority. Each applicant will have the opportunity to select priority ED status on the lottery application. This designation will be optional and not required. However, applicants that do not select ED priority on the lottery application will not be able to indicate priority later. Applicants that select ED priority status will be required to consent to household income verification by designated school staff to verify FRL status. Only designated staff will have access to this information. Once the status is verified, the documentation will not be retained for used for any other purposes

B. Education Plan (30 points)

Provide responses to all the questions below regarding the education plan proposed by the school. Additional evidence may be provided in Appendix E. This application section is worth up to thirty (30) points.

<p>B.1 Provide a General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students. (2 points)</p>
<p>Wendell Falls Charter Academy intends to take all necessary steps to ensure equitable access to, and participation in, its federally assisted program for students, teachers, and other program beneficiaries with special needs.</p> <p>To ensure the success of this proposal, we will address any and all relevant barriers that would otherwise impede equitable access or participation including gender, race, national origin, color, disability, or age. These barriers will not prevent students, teachers, etc. from such access or participation in, this federally funded project.</p> <p>Examples that describe ways in which Wendell Falls Academy will comply with Section 427 include:</p> <ul style="list-style-type: none"> • Spanish speaking staff will be available to meet with parents and students. • The implementation activities will be designed to reach the entire school community including all racial/ethnic groups within it. • Distribute promotional materials in multiple languages, including Spanish to make sure that "harder-to-reach" families (e.g. single-parent families, low socio-economic households, etc.) are aware of the grant and the activities in which they can participate. • Wendell Falls Charter Academy will post materials in locations of public access. • Parent surveys will be administered in both English and Spanish. • Admission applications will be available in English, Spanish and other languages as necessary.
<p>B.2 Provide at least three (3) school-specific subgrant program goals. Subgrant goals must be SMART (specific, measurable, achievable, rigorous, and time-bound). (3 points)</p>

	Specific	Measurable	Attainable and Achievable	Realistic and Relevant	Timely	
	During the 2020-2021 school year, 50% of all students will improve their reading proficiency as measured by a 3% increase in the pass rates of students who are economically disadvantaged through the EOG and/or local school assessments.	Reading	50% of identified ED students in grades K-6 based on EOG/local assessments	Improve performance	% determined by baseline performance in BOG/local assessment first check in testing	By end of school year 2021
	During the 2021-2022 school year, 75% of all students will improve their reading proficiency as measured by a 3% increase in the pass rates of students who are economically disadvantaged through the EOG and/or local school assessments.	Reading	55% of identified ED students in grades K-7 based on EOG/local assessments	Improve performances	All students increase by at least 3% based on school year 20/21 data	By end of school year 2022
	During the 2020-2021 school year, 50% all students will improve their math proficiency as measured by a 3% increase in the pass rates of students who are economically disadvantaged through the EOG and/or local school assessments	Math	50% of identified ED students in grades K-6 based on EOG/local assessments	Improve performance	% determined by baseline performance in BOG/local assessment first check in testing	By end of school year 2021

B.3 Describe how the school's academic program is or will be specifically tailored to meet the needs of educationally disadvantaged students. Include specific strategies the charter school currently uses or plans to use to serve educationally disadvantaged students. (10 points)

WFCA will fulfill our commitment to serve a greater number of educationally disadvantaged students through our education model and its emphasis on individualized instruction. Successful implementation of the Education Model is supported by a framework comprised of 16 Core Fundamental Educational Components. The Core Fundamentals provide a structure that will enable WFCA to establish a positive school climate, attend to curriculum and instruction, and develop data literacy for all stakeholders. When implemented effectively, the Core Fundamentals create a pathway for school-level innovation and student success. The Core Fundamentals are grouped into categories that serve as the foundation of the Education Model: School Climate, Curriculum and Instruction, and Data Literacy.

School Climate

Reflects the way the school feels, both to visitors and school community members engaged in academic and school life activities. School climate includes:

1. Professional Development
2. School-wide Behavior Plan
3. Expectations and Procedures
4. Social-Emotional Learning (SEL) and Character Education

Curriculum and Instruction

Reflects the work that takes place in the classroom setting and addresses the critical elements necessary to meet student academic needs and create engaging and meaningful learning experiences.

This encompasses the following:

5. GVC
6. Lesson Planning and Delivery
7. Data-Driven Instruction
8. Instructional Focus Calendar
9. MTSS
10. Tutoring
11. Instructional Software

Data Literacy

Ensures all stakeholders can access and interpret data related to school, student, and teacher effectiveness and determine next steps for growth and opportunity. Data literacy includes:

12. Balanced Assessment System
13. Data Chats
14. Grading
15. PLPs
16. North Carolina Educator Effectiveness System

MTSS

Teachers will differentiate instruction to reach all learners in each subject area, but there will be times when students need additional support to ensure they do not fall further behind. Diagnostic and benchmark assessments are used to identify skill deficiencies and monitor progress, such as Wonders

diagnostic assessment, Fountas and Pinnell Benchmark Assessment System, and NWEA assessments. When students are not performing at expected levels, procedures are in place to ensure students are properly identified and placed into appropriate intervention programs to get them back on track for success. WFCA will follow the Response to Intervention (RtI) tiers listed below.

Tier 1: Standards-Based Classroom Learning

All students participate in general education learning that includes universal screenings to target groups in need of specific instructional and/or behavioral support; implementation of the North Carolina Essential Standards through a standards-based classroom structure; differentiation of instruction, including flexible grouping, multiple means of learning, and demonstration of learning; progress monitoring of learning through multiple formative assessments; and positive behavior supports.

Tier 2: Needs-Based Learning

In addition to Tier 1, targeted students participate in learning that is different by including a standard intervention protocol process for identifying and providing research-based interventions based on student need, and ongoing progress monitoring to measure student response to intervention and guided decision-making. Instruction occurs in small groups in addition to the time allotted for core instruction.

Tier 3: SST-Driven Learning

In addition to Tier 1 and Tier 2, targeted students participate in learning that is different by including intensive, formalized problem solving to identify individual student needs; targeted research-based interventions tailored to individual needs; different curriculum resources; frequent progress monitoring; and analysis of student response to intervention(s). The time spent on instruction for Tier 3 students is in addition to the combined Tier 1 and Tier 2 amounts. Depending on which tier the child falls under, WFCA will implement various interventions and increase the number of instructional minutes provided. The following interventions are available:

- * Differentiated RtI Block: Students are placed in various classes for a block of time to receive targeted instruction in either reading, math, or science depending on their levels and skill deficiencies.
- * Push-in/Pull-out Instruction: Outside of their core classes, students receive intensive instruction based on their skill level.
- * Tutoring/Extended Day: After-school small-group instruction utilizing a separate curriculum to reach the needs of the below-grade-level students.

The RtI block is provided to students for a set amount of time each day, but other interventions may be increased or decreased depending on the amount of support the child needs. For example, students can attend Saturday tutoring sessions or have multiple push-in/pull-out sessions during the week to catch up to grade level.

Teachers will create a Progress Monitoring Plan (PMP), which describes the current level of the students based on data from their assessments, the targeted interventions needed, the frequency in which the interventions will be administered, and the expected outcome or goal of the intervention.

Parents, teachers, and administrators sign the PMP and the team reconvenes at least quarterly to monitor progress and review the plan. Teachers provide more frequent updates through parent conferences, informal conversations, and graded assignments.

ELL Programming

WFCA's program for ELL students prepares and successfully equips ELL students to fully participate, engage, and lead in their global community without a language barrier. To support our mission of providing a student-centered, data-driven learning environment, we will equip them with targeted

instructional supports necessary to achieve mastery of the NC English Language Proficiency Standards as measured by the W-APT and Assessing Comprehension and Communication in English State-to-State (ACCESS) for ELLs 2.0. A structured English immersion methodology will be used at WFCA to fulfill this goal. This strategy has been shown to demonstrate the best results with ELL students. ELL students will be identified in the initial assessments administered upon enrollment and through a Home Language Survey. Students will be selected to take the assessment if they are foreign-born or do not speak English in the Wendell Falls Charter Academy. If students are language-minority students, they will be scheduled to be administered the W-APT within 30 calendar days of enrollment and the parent will be notified. If a student is tested and determined to be limited English proficient, the student will be tested annually. Once the assessment results are collected, an instructional plan for students who qualify will be created, including the integration of scaffolding methods to address the ELL student and setting goals for achieving mastery of the NC English Language Proficiency Standards. As prescribed by law, intervention that facilitates growth in English mastery while promoting content knowledge will be administered. To support literacy and proficiency, the ELL program provides English language development instruction that is age and grade appropriate and tailored to the student's English proficiency level. The ELL program will be conducted in a climate that not only stimulates listening, speaking, and reading, but also writing. ELL students are offered instructional services through an English Immersion program mainstream/inclusion instructional delivery model. Instruction is supported using ELL instructional strategies. In addition, the curriculum, textbooks, and other instructional materials used by ELL students will be comparable to those used by their non-ELL counterparts. Supplemental text and materials are also provided. Mainstream/inclusion instruction is provided to ELL students equal in amount, sequence, and scope to the instruction provided to non-ELL students at the same grade levels, while also including specific accommodations and modifications to the curriculum. The PLP is used to show the areas of success and growth that the student maintains. The ELL strategies are documented in the teachers' lesson plan, as well as in the students' PLP and ELL folder. The ACCESS 2.0 is administered yearly to assess ELL students' language proficiency. Once a student reaches proficiency in all four language domains of the assessment, as determined by DPI, he or she exits the program. The students' academic progress is regularly monitored after exiting from the ELL program. Documentation, including the monitoring form and tool, is placed in the students ELL file. The language arts teacher will indicate if the student is making appropriate progress or if an ELL committee meeting needs to be held. During the ELL committee meeting, recommendations regarding the students' progress, including placing the student back into the ELL program, can be made.

Exceptional Students Educational Programming

For students who are performing below grade level, provisions of reasonable supplementary supports and services and/or modifications and accommodations are provided to ensure that they achieve the NC Standard Course of Study and NC Extended Content Standards. Teachers use scaffolding and provide students with direct instruction, modeling, guided practice, and independent practice. Small groups are used for more individualized instruction when necessary with additional support provided by EC staff or instructional coaches when needed.

Based on benchmark assessment data, students may receive additional instruction and practice on identified skills. Teachers provide additional instruction outside of the standard instructional block through content area integration, during enrichment activities or lunch, and any other opportunity to support student achievement of individual learning goals. We will meet the individual needs of students who, based on diagnostic data, are identified to have significant skill deficiencies and/or read two or

more years below grade level through additional instructional minutes using a research-based intervention program. Students receive additional instruction in a small-group setting with more frequent progress monitoring to ensure accelerated progress toward grade-level expectations.

Teachers with NC Exceptional Children certification will serve students meeting the eligibility criteria for EC as specified in the students' IEP. Based on the enrollment of students with disabilities, we will hire and train the appropriate number of teachers/paraprofessionals to ensure adherence to federal and state guidelines for class size and caseload and ensure all necessary IEP services are being implemented. Licensed/certified vendors will be contracted to provide special education and related services. The students IEPs determine the specific services that will be contracted. Students with disabilities whose IEPs demonstrate the need for special education or related services are served in the regular classroom or EC setting, as determined by the IEP Team through consideration of the least restrictive environment based on the individual students need.

The Lead EC Teacher ensures that students are scheduled in a manner that allows for implementation of the services identified on each students IEP. EC services are provided through a model of inclusion for all students with disabilities in the least restrictive environment as determined by the IEP Team. A full continuum of special education and related services will be offered to meet the needs of students with disabilities. Students are educated in an EC setting only if the nature and severity of the students disability is such that education in general education classes with the use of supplementary aides and services cannot be achieved satisfactorily. EC teachers and general education teachers collaborate with regards to lesson planning and implementation and student progress. Related service providers will also collaborate with the students EC and general education teachers. This ensures that all teachers working with EC students are focused on meeting student needs as well as student growth and goal attainment. We will comply with state policy NC 1501 to ensure that students with disabilities receive a FAPE. A full continuum of services will be provided to meet the needs of enrolled students. Decisions related to addressing the needs of students with disabilities are made through the collaboration of a team. For students with an IEP, this team will consist of the students' parents, the student if appropriate, EC provider(s), general education teachers, and the LEA representative. For students protected under Section 504, a team of no less than three individuals who know the student, have knowledge about the students' disability, and are knowledgeable about instructional aids/accommodations form the collaborative decision-making team.

Families of students with disabilities are provided with written procedural safeguards in the native language of the parent(s), unless it is not feasible to do so, in order to notify and make parents aware of their rights and responsibilities. If a written document in the native language of the parent(s) is not available, the explanation of the notice is given orally or in a manner of communication the parent(s) understand. Personnel at the school will ensure that the parent(s) understand(s) the information. To ensure the provision of FAPE, personnel at the school considers whether the student requires assistive technology devices in order to access education. The need for extended school year services will also be reviewed and provided to students if determined necessary by the students IEP Team. Steps are also taken to provide nonacademic and extracurricular services and activities to students with disabilities by providing supplementary aids as appropriate and necessary. Additionally, staff members responsible for student discipline receive training on FAPE requirements to ensure that state policies are followed related to the discipline of students with disabilities.

Teachers and EC service providers are responsible for implementing each student's IEP. Providers maintain service logs to reflect the delivery of services indicated on each student's IEP. Teachers and

service providers are involved in progress monitoring to assess the progress each student is making toward his/her IEP goals. This information is communicated quarterly to the students' parent/guardian or more frequently if feedback is requested. In addition, classroom teachers remain in contact with relevant stakeholders by updating the students PLP, using data derived from ongoing progress monitoring and interim testing results.

Vendors are contracted to provide EC and related services including, but not limited to speech and language services, occupational therapy, physical therapy, and school psychology evaluation services. The students IEPs determine the specific services that are contracted. All contracted providers are required to be appropriately certified/licensed based on State Board of Education requirements. In addition, contracted providers are required to maintain professional liability insurance. During the summer prior to WFCA's opening, IEPs of enrolled students will be reviewed to determine which of these EC contracted services are needed and to finalize contracts to allow services to be in place at the start of the school year.

The Lead EC Teacher ensures that students are scheduled in a manner that allows for implementation of the services identified on each students IEP. All clinicians will comply with FERPA and provide a range of services including evaluation, participation in team meetings, development and generation of the IEP/Section 504 plan, treatment and remediation, and collaboration with school staff.

B.4 Explain how the charter school's education plan compares to or differs from that of the local LEA(s). (5 points)

The proposed Education Model is an instructional philosophy developed after extensive study of instructional practice and grounded in over 35 years of Dr. Robert J. Marzano's research. Its purpose is to facilitate each students' mastery of the North Carolina Standard Course of Study's (NCSCS) content standards. Diversity among our student population is valued and expected, which is why our education model and academic programming are designed to meet individual student needs. The heart of the Education Model is the Guaranteed Viable Curriculum (GVC), which is comprised of a year-long plan for standards-based instruction at each grade level. The GVC ensures steady academic progress as students build their knowledge and skills from one year to the next to master state standards.

WFCA will fulfill our commitment to serve a greater number of educationally disadvantaged students through our education model and its emphasis on individualized instruction. Our education model differs from Wake County in that it will provide individualized, data-driven instruction within a culture of high expectations and achievement that emphasizes 21st century learning in a technology-rich environment. WFCA's student-centered approach will foster individualized attention that provides an opportunity for students to reach their potential and receive the required differentiated instruction to demonstrate growth, while still maintaining access to a standards-based curriculum. In support of our mission, we believe each instructional minute counts. As a result, our academic calendar exceeds the requisite 1,025 instructional hours to provide maximum opportunities for students to learn and practice new concepts, develop critical 21st century skills, and allow teachers time to provide engaging instruction tailored to student need. Below is a description of the 8-Step Process, which enables teachers to implement and deliver the education model with fidelity.

8-Step Process

The 8-Step Process represents a continuous improvement model that focuses on student performance through the alignment of school-wide planning, instruction, assessment, and support efforts. The process encourages the necessary collaboration among teachers, students, and instructional support staff needed to effectively implement the Education Model in a manner that supports a high level of

data-driven instruction. The process incorporates a Plan-Do-Check-Act (PDCA) model that aligns well with the steps of the Education Model and supports improved academic achievement. The 8-Step Process includes:

1. Data Disaggregation
2. Timeline Development
3. Instructional Focus
4. Assessment
5. Tutorials
6. Enrichment
7. Maintenance
8. Monitoring

B.5 Describe the school's discipline and school climate philosophy and how it supports the development of educationally disadvantaged students. (5 points)

WFCFA will actively work to establish a school culture in which academics, a sense of community, and innovations flourish. The school will leverage the focus on Core Fundamentals impacting school culture to ensure equity, positive interactions, academic success, and the healthy development of students as well-rounded individuals. The Code of Conduct is provided to parents and students at the beginning of the school year to ensure all families are aware of behavior expectations and consequences, due process and grievance procedures. It outlines and defines the infractions that may lead to in-school consequences, suspension and/or expulsion. Depending on the severity and situation of each case, the following offenses may lead to a consequence ranging from in-school disciplinary action to suspension/expulsion:

- *Infractions of class/school rules
- *Contraband items (i.e. lighters, matches)
- *Integrity (i.e. cheating, forgery)
- *Trespassing
- *Inappropriate interpersonal/sexual behavior (including harassment)
- *Disrespect and noncompliance
- *Use of electronic devices
- *Gambling
- *Harassment, abusive, offensive language
- *Bullying
- *Hazing
- *Physical, written, or verbal aggression, or threat of
- *Unjustified activation of a fire alarm or other system
- *Theft or destruction
- *Possession of weapon, tobacco, narcotics, alcohol, or controlled substance

All discipline decisions, especially those related to students with disabilities, will be determined on a case-by-case basis. WFCFA will adhere to all federal and state laws regarding discipline of all students, including students protected under IDEA and 504 legislation. To the extent that they also take such action for children without disabilities, WFCFA personnel may, for not more than 10 school days in a row, remove a child with a disability who violates a provision of the Code of Student Conduct from his or her current placement to an appropriate interim alternative educational setting, another setting, or suspension. Additional removals of the child of not more than 10 school days in a row in that same school year for separate incidents of misconduct may be imposed, if those removals do not

constitute a change of placement. Once a child with a disability has been removed from his or her current placement for a total of 10 school days in the same school year, WFCAs will provide, during any subsequent days of removal in that school year, services to the extent required.

A principal may impose a short-term or long-term suspension when a student willfully engages in conduct that violates a provision of the Code of Student Conduct authorizing such consequences. For short-term suspensions, the student will be provided an informal hearing including the basis for the accusations and the opportunity to respond to the charges. The principal may impose a short-term suspension without providing the student a hearing if the presence of the student creates a direct and immediate threat to the safety of other students or staff, or substantially disrupts or interferes with the education of other students or the maintenance of discipline at the school.

The Board will provide the student a hearing before imposing a long-term suspension. The principal will provide notice to the student's parent of the long-term suspension recommendation. Long-term suspension hearings shall be conducted in accordance with state law and students will be provided procedural due process.

Upon recommendation of the principal, the Board may expel any student 14 years of age or older whose continued presence in school constitutes a clear threat to the safety of other students or school staff. Prior to the expulsion of any student, the Board shall conduct a hearing. The student shall be given reasonable notice of the recommendation in accordance with the provisions for long-term suspensions as well as reasonable notice of the time and place of the scheduled hearing.

B.6 Describe how the school's calendar supports the development of educationally disadvantaged students. (5 points)

The daily school schedule is designed to accommodate common grade planning periods. One schoolwide meeting per month is devoted to topics associated with Professional Standards. This time is also used for targeted PD sessions based on specific needs identified through professional learning communities and monthly data chats. Teachers meet with administrators, CRTs, CSs, or peers to receive PD based on WFCAs Core Fundamentals strategic implementation plan, school initiatives, survey results, teacher demand, or other areas needed for school improvement. Meetings are conducted after school, on PD days, or during weekly planning.

Professional Development Plan

WFCAs PD plan is intended to be completed over the course of the school year and consists of targeted PD segments rolled out to support the schools' implementation of the Education Model. Trainings are facilitated in the first year by the schools CS team, and in subsequent years by the CS and/or the school-based CRTs and administrative team. A sample PD Plan could consist of the following topics, which establish the Core Fundamentals that enable full and effective implementation of the Education Model:

1. Expectations and Procedures (aligned to schoolwide behavior plan)
2. Grading Philosophy and Processes (gradebook setup)
3. GVC (unpacking standards)
4. Lesson Planning
5. Instructional Software
6. Introduce Balanced Assessment System
7. Instructional Focus Calendar and Success Time Planning
8. Social Emotional Learning and Character Education

9. Balanced Assessment System (Benchmark Assessment Training)
10. Data-Driven Instruction - Small Group Instruction
11. Response to Intervention (MTSS)
12. Tutoring Expectations
13. Balanced Assessment System (Formative Assessment Training)
14. Data Driven Instruction Differentiation
15. Balanced Assessment System (Summative Assessment Training Test Specifications)
16. Personalized Learning Plans
17. Effective Data Chats
18. Teacher Evaluation System (TFET/DPP Training)

C. Operations Plan (30 points)

Provide responses to all the questions below regarding the operations plan proposed by the school. Additional evidence may be provided in Appendix E. This application section is worth up to thirty (30) points.

C.1 Detail any partnerships the charter school maintains or plans to develop to support educationally disadvantaged students, including a 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.⁴ (2 points)

The Board has an existing agreement with CSUSA to manage Cardinal Charter Academy. We were pleased with the successful opening of our first school and the support services we have received from our educational partner and look forward to working with them in developing and operating additional schools.

We have observed, through site visits to CSUSA-managed schools and by attending their annual Summit that CSUSA manages schools with a personal mission by providing the most consistent and research proven instruction. They excel at teacher training and support and above all have an exceptional educational program.

CSUSA's assistance in marketing our initial school has exceeded our expectations. Upon opening our first school was fully enrolled with a large waiting list. CSUSA delivered a state-of-the-art facility on time and our teachers and students had all the resources needed on day one. Its Education Team worked closely with the principal to ensure all textbooks and curriculum resources were ordered and teachers were properly trained. Its Finance Team worked closely with our schools' business manager to ensure all reporting systems were in place.

There is a reporting mechanism in place for educational, financial, and operational updates during monthly board meetings, and a support team at CSUSA works closely with our school staff and administration to ensure we are on task and working toward meeting our educational and financial goals.

Our relationship with CSUSA is governed by a performance-based management agreement. The Board has engaged Donna Rascoe, Esq. as independent legal counsel and has been working with her since the Boards inception. Board members have worked closely with legal counsel to review and negotiate the terms of the management agreement prior to execution.

Triangle Charter Education Association has an existing partnership with CSUSA. In partnership with us and other non-profit boards, CSUSA has successfully developed six charter schools in NC: Langtree Charter Academy, Cabarrus Charter Academy, Cardinal Charter Academy, Kannapolis Charter Academy, Iredell Charter Academy and Union Preparatory Academy at Indian Trail. Langtree and Cabarrus opened in 2013, Cardinal in 2014 and Kannapolis, Iredell and Union in 2016. Students at these schools have exceeded county and state proficiency averages in many grades and subject areas. Cardinal Charter Academy, the school we are replicating, outperformed the state in overall performance by 12 percentage points and on college and career performance by just over 14 percentage points in math. In reading, Cardinal Charter Academy's performance exceeded the state by

⁴ Provide any contractual agreements as part of Appendix B.

20% points and 18% points respectively. Cardinal also surpassed its home district, Wake County Schools, by about 5% points in overall performance and college and career performance in math and 12% points overall and 8% points on college and career performance in reading. Success at these schools is due to the strength of the CSUSA Education Model and the fidelity of its application.

In addition, the charter school governance and fiscal responsibility relationships make this a successful model to replicate. The boards exercise fiduciary responsibility, ensure accountability, and use best practices to ensure the budget and policies are aligned to the schools' mission. The boards ensure that programs and operations are faithful to the terms of the charter, including compliance with statutory and regulatory requirements. Each of the schools' financial affairs is in good standing and has clean audits with unqualified opinions.

Our relationship with the EMO is codified with a performance-based contract. The executed management agreement outlines the duties and responsibilities of each party and the specific performance requirements of the EMO. We will independently adopt a comprehensive budget on an annual basis, which will include all forms of revenue and all expenditures. Any and all budget amendments will require our approval. On a monthly basis, the EMO will provide a detailed accounting of all school revenues and expenditures. In addition, the EMO will report, on a monthly basis, the current student enrollment of the school and the number of students on the waiting list (if any). The EMO will provide monthly financials, which will include a statement of revenues and expenditures prepared in accordance with generally accepted accounting principles.

The EMO will be responsible for the daily financial management of the school, subject to the budget and oversight of the Board. The Board will be responsible for overall policies regarding WFCA's governance, academic, personnel, discipline, and grievance policies. It is our responsibility to hold the EMO responsible for the successful operation of the school and its ability to deliver academic results. This system of accountability ensures that WFCA will be devoted to its mission of providing a rigorous educational program.

The principal will be responsible for implementing and enforcing all policies set forth by the Board. School employees will be responsible for, above all else, the delivery of WFCA's rigorous academic program. Teachers are jointly employed by both the Board and CSUSA, with the Board retaining ultimate authority over the hiring and firing of teachers.

C.2 Describe how the school's staffing structure, capacity, and diversity will be sufficient to meet the needs of all students, particularly educationally disadvantaged students. (3 points)

The Board and CSUSA will be an equal opportunity employer and will recruit quality staff throughout the year for job openings using a progressive and innovative recruiting plan. Recruitment will occur locally, state-wide, and nationally through various resources that include:

- * WFCA's website.
- * CSUSA's website.
- * Education job fairs.
- * College recruiting by identifying colleges and universities, both locally and nationally in order to attract and hire newly graduated teachers.
- * Select educational, professional, and job recruitment websites to advertise and communicate teaching openings.

* Minority referring organizations to help ensure that the workforce is reflective of the diverse community served.

CSUSA will manage job advertising, conduct applicant screening, and refer qualified applicants to the school administration and Board to ensure WFCA's staffing needs are met. A consistent process of screening, interviewing, and selecting employees is essential to our ability to recruit qualified staff. A consistent process will ensure that candidates are provided an equal opportunity to demonstrate and/or articulate their skills and abilities.

Retention of highly qualified and effective teachers will be part of the principal's annual evaluation system. The principal will be encouraged to set goals and the annual evaluation will be based upon achieving those goals.

In the proposed staffing model, there are no positions with dual responsibilities. The Board and CSUSA strategically put together a 5-year staffing plan to cover all needs of the school so no position will have dual responsibilities. There will be employees that may have additional duties if they choose, such as mentoring, professional development, etc. These employees will be paid a stipend (which is included in the budget calculations) in addition to the salary for any additional duties as needed.

Staffing is flexible and subject to change based on student needs as identified by the principal and the Board. Staffing needs are constantly monitored, particularly at the beginning of the year to enable WFCA to meet students' needs and ensure their success.

Initially we plan to hire one EC teacher in Year 1 and add a second EC teacher by Year 3, one of whom will serve as Lead EC teacher to oversee EC compliance. An EC aide will also be hired for all years. This will be adjusted based on student needs as indicated in their IEPs and guidelines for class size (NC 1508-3) and caseload (NC 1508-4). When hiring general education teachers, we will seek teachers also certified in ELL, EC, or teachers with demonstrated experience in differentiated instruction including extending knowledge for higher performing students.

C.3 Describe the school's marketing and recruiting plan, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students, including efforts to overcome any potential language barriers. (5 points)

Primary Target Demographics

Families with children ages 5-14 residing in Wake County, specifically in Wendell Falls and Knightdale.

Marketing Strategy

The communication strategy includes an integrated marketing approach; which may include digital advertising, social media, print, radio, television, community outreach and events. Each medium is evaluated based on its reach (how many potential targets will see or use this medium) and frequency (how often potential targets will see/read/hear our message), as well as its likelihood to drive traffic. Digital advertising will be utilized to reach out to our target demographic. This will include but not be limited to social media sites, online education resources, online parenting resources and community sites. Online ads will direct the potential parent/guardians to the WFCA website at www.wendellfallscharter.org. Targeted email blasts and campaigns that piggyback on community websites/events are utilized whenever possible. Online advertising primarily includes Facebook, GreatSchools.com, and Google focusing on geographic data and targeted searches. A television campaign may be run on cable and/or broadcast television. Cable television provides a more targeted reach with a very high frequency. Broadcast provides a very large reach, but low frequency. A radio

campaign will also be considered to build awareness. Stations will be chosen based on how they align with our targeted demographic. Print back-to-school sections and age-appropriate advertising sections will be considered. Paid advertising on social media outlets is utilized to reach our demographic and geographic targets. Facebook, Twitter, YouTube, Instagram and Pinterest will be considered. Community outreach and events will be offered. WFCA will align with community partners such as the Chamber of Commerce as well as area rotary clubs and other civic organizations. WFCA will work with area civic/community centers, such as the YMCA, Regional Library, and Park and Recreation Centers to post information and hold community outreach events. We will also distribute flyers to local pre-schools, daycare centers, and churches.

We plan to communicate and engage parents and community members through enrollment information sessions, speaking opportunities at local churches and civic organizations, distribution of informational materials to preschools, churches, and local business and service organizations in the community, all of which provide a forum to share our vision and mission for WFCA. Several public information sessions will be hosted to introduce the Board and its vision for WFCA, inform the community of the mission and educational focus, and communicate the enrollment process to parents. These sessions allow for a Q&A and open forum to provide parents an opportunity to ask questions and further engage with the Board. Parents can learn more about WFCA, its educational model, and how to apply. Public information meetings are advertised through direct mail, email, newspaper ads, and flyers. We will continue to look for community events where we can distribute marketing collateral to inform the community about the proposed charter school and how to apply. Once parents apply, we are then able to continually update them via email through the student information system. WFCA's website will serve to communicate general information, provide updates regarding the school's opening, offer an enrollment tool, provide updates on the progress of the school, and provide updated FAQs. The website will also include an informational video for those who are unable to attend information sessions that covers much of the same content.

C.4 Describe how the school currently does or will provide a transportation plan that accommodates and supports educationally disadvantaged students. (5 points)

The Board recognizes that transportation cannot be a barrier to any child attending the school. Therefore, school administration and CSUSA will assist parents with the identification and coordination of transportation options to ensure that transportation to the school is available to all students. This will include facilitating carpools and informing parents as early as Open House of their transportation options. All parents will be provided with a link to an electronic survey through which they are able to express their interest in ride sharing and gain access to a pool of parents residing within the same region. In the event ridesharing may not be achievable, the school may provide transportation through an agreement or contract with the local school district or a private provider. If necessary, the school will contract with a district-certified and licensed school bus company to provide transportation. The provider shall furnish proof that it meets or exceeds all applicable district, state, and federal rules and regulations governing student transportation. If transportation is offered, the school will restrict transportation of students to those who live within a reasonable distance, generally considered to be within a 2-4 mile walkout radius of the school, and those students subject to a hazardous walking condition. The school may provide transportation to students outside of the reasonable distance when transportation is necessary to provide adequate educational facilities and opportunities which otherwise would not be available. Transportation will be provided for students with disabilities enrolled in the school as required by the students IEP. At the request of the parent, the school shall provide

transportation pursuant to the McKinney-Vento Homeless Assistance Act (42 U.S.C. Section 11431, et. seq.) for each child of a homeless individual and each homeless youth.

One bus has been included in the budget for transportation at an average rate of \$300 per day for year one. A 2% increase has been budgeted each year thereafter. The school shall receive its portion of categorical funds relating specifically to transportation of students.

* Year 1: \$54,000

* Year 2: \$55,080

* Year 3: \$56,182

* Year 4: \$57,305

* Year 5: \$58,451

All transportation related information will be provided to parents via student information system communication as well as in the Live Binder of Frequently Asked Questions, which will be published online for all applicants and enrollees.

C.5 Describe how the school currently does or will provide a school lunch plan that accommodates and supports educationally disadvantaged students. Provide information about participation in the National School Lunch Program or a comparable, comprehensive lunch program. (5 points)

The facility plan will include a multipurpose room which will mainly be used as a spacious cafeteria and will also serve as a gym. All students will eat meals in the cafeteria. The school will contract with a national food service vendor to provide breakfast and lunch. The food vendor will provide a quality, unitized meal program that includes all the components of a full-service operation. The component meal system should consist of individually packaged entrees, side dishes, fresh fruits, vegetables, bread, milk, condiments, plastic wear, and trays and liners. Prior to the beginning of the school year, the selected food vendor and the Board will send training personnel to the school to train food service staff on how to properly run the food service program, including: ordering, inventory, food preparation, serving procedures, and clean up.

The school will utilize a computerized point-of-sale system that will track meals and provide a reporting function for accountability and claiming. All students are assigned a unique account number and can add funds to their account in the cafeteria office and online. Regardless of account balance, no child is ever denied a meal. Serving lines are set up with the point of service station at the end. This set up ensures the cafeteria personnel can verify students are receiving all required components of a reimbursable meal.

In addition, the Board will complete all necessary NSLP applications in advance of the school year. At the end of each month, the cafeteria staff will be responsible for sending the monthly edit check to the NSLP Director for use in the submission of the reimbursement claim. If the school's application for participation in this program is not accepted, the school will continue to serve free and reduced meals to students who would have otherwise qualified under NSLP regulations. The school will amend its operating budget to reflect the reduction in revenues associated with reimbursement from the NSLP.

C.6 Describe how the school's professional development plan supports and is tailored to the development of educationally disadvantaged students. (5 points)

The Teacher Support Team is responsible for maintaining teacher licensure requirements and professional development. The team consists of the principal, assistant principal, and designated mentors. Each will assist teachers to grow as educators.

To ensure teachers provide an academically rigorous education, WFCA will mentor, retain, and evaluate staff in accordance with N.C.G.S., section 115C-333.1. All teachers who have not been employed for at least three years shall be observed at least three times annually by the principal or the principal's designee, and at least once annually by a teacher. Two of the principal or principal designee observations shall take place within the first semester for teachers with fewer than two years of employment, with one of the two observations taking place prior to the first grading period, if possible.

All teachers with fewer than three years of service must be evaluated at least once annually by a principal. All teachers with career status shall be evaluated annually unless rules that allow those teachers to be evaluated frequently are adopted by the Board. All teachers will be evaluated in accordance with the NC Educator Evaluation System (NCEES). NCEES also includes a Professional Development Plan (PDP) for beginning teachers, which is described further below. Before participating, every teacher must complete training on the evaluation process.

The Beginning Teacher Support Program (BTSP)

WFCA's BTSP will comply with SBE policy TCED-016 and utilize the North Carolina Department of Public Instruction BTSP self-assessment to monitor program compliance and efficacy. This program provides several required activities and additional tools to assess the performance of teachers and to facilitate the refinement of essential practices and skills. Additional support tools include a beginning teacher website, notification of professional development opportunities, online training modules, and additional instructional materials that support teacher retention.

Beginning teachers are assigned a mentor to assist with their growth in the first three years of the BTSP. Mentors will:

- *Conduct observations of beginning teachers.
- *Meet and/or communicate with beginning teachers on a bi-monthly schedule, at a minimum.
- *Provide feedback to beginning teachers from observations and formative assessments.
- *Assist beginning teachers with developing lesson plans; classroom management; behavior management; analyzing and collecting data; organization; positive communication with peers and parents; the curriculum; and instruction.
- *Assist with collecting and analyzing data to improve instructional strategies.
- *Share information regarding professional development.
- *Assist in the preparation and implementation of the PDP.

WFCA's principal will help facilitate the development of beginning teachers by:

- *Providing orientation.
- *Conducting informal/formal observations.
- *Meeting and conferencing with beginning teachers to offer feedback from observations and formative assessments.
- *Providing an environment conducive for the support of beginning teachers.
- *Ensuring completion and providing assistance in the development of PDPs.
- *Monitoring beginning teachers throughout the year and notifying the Director of Human Resources of any concerns with beginning teacher performance.
- *Evaluating the BTSP to identify areas requiring improvement. WFCA will document compliance of the BTSP through informal/formal observations, PDPs, summative evaluations, and other documentation regarding the evaluation of beginning teachers pursuant to the NCEES on the State-maintained Home Base website.

Teacher Learning Communities (TLCs)

WFCA will implement TLCs to provide support to teachers in their first year. TLCs support teachers throughout the year by focusing on research-based instructional strategies, classroom management, lesson planning, time management, state and district requirements, and professional communication. A master teacher will lead WFCA's TLC program. This highly organized program receives support from the EMO network through quarterly training sessions, monthly web-based video training sessions, and training materials. During the school year, needs and opportunities for staff training are identified according to analysis of student performance data, administrator and CRT observations, CSUSA Carolinas instructional site visit data, and teacher requests. WFCA will design or select PD programs based on the schools' needs with input from administrators and staff. PD will be held in various formats including consultation, modeling, coaching, learning communities, observation and feedback, lesson studies, mentoring, content training sessions, reflective collaboration, and technical assistance. Sessions may be led by mentor or lead teachers, administration, the CRT, regional CS, or outside experts.

The daily school schedule is designed to accommodate common grade planning periods. One schoolwide meeting per month is devoted to topics associated with Professional Standards. This time is also used for targeted PD sessions based on specific needs identified through professional learning communities and monthly data chats. Teachers meet with administrators, CRTs, CSs, or peers to receive PD based on WFCAs Core Fundamentals strategic implementation plan, school initiatives, survey results, teacher demand, or other areas needed for school improvement. Meetings are conducted after school, on PD days, or during weekly planning.

Professional Development Plan

WFCAs PD plan is intended to be completed over the course of the school year and consists of targeted PD segments rolled out to support the schools' implementation of the Education Model. Trainings are facilitated in the first year by the schools CS team, and in subsequent years by the CS and/or the school-based CRTs and administrative team. A sample PD Plan could consist of the following topics, which establish the Core Fundamentals that enable full and effective implementation of the Education Model:

1. Expectations and Procedures (aligned to schoolwide behavior plan)
2. Grading Philosophy and Processes (gradebook setup)
3. GVC (unpacking standards)
4. Lesson Planning
5. Instructional Software
6. Introduce Balanced Assessment System
7. Instructional Focus Calendar and Success Time Planning
8. Social Emotional Learning and Character Education
9. Balanced Assessment System (Benchmark Assessment Training)
10. Data-Driven Instruction - Small Group Instruction
11. Response to Intervention (MTSS)
12. Tutoring Expectations
13. Balanced Assessment System (Formative Assessment Training)
14. Data Driven Instruction Differentiation
15. Balanced Assessment System (Summative Assessment Training Test Specifications)
16. Personalized Learning Plans
17. Effective Data Chats
18. Teacher Evaluation System (TFET/DPP Training)

C.7 Describe the school’s plan to engage families and implement a parent/community advisory council.⁵
(5 points)

We will continue to engage parents in the life of WFCA by following the CSUSA Education Model which includes a comprehensive parental involvement program and family-school-community partnership model. Parental involvement includes attending school functions; attending conferences; helping children improve their school work through encouragement, providing study time and place, model behavior, and tutoring; serving as advocates for their children and the school; volunteering in the school and community; and assuming an active decision-making role in their child's education (Maynard 1997). WFCA will utilize the framework of Joyce Epstein, whose model includes six types of cooperation between families, schools, and other community organizations: 1. Parenting; 2. Communicating; 3. Volunteering; 4. Learning at home; 5. Collaborating with the community; and, 6. Decision-making (Epstein, 1995; Epstein, 1997). The framework of six types of involvement helps educators develop more comprehensive programs of school-family-community partnerships. Although WFCA will use the framework as a guide; the Board, parents, and school staff will choose practices that help achieve important goals and meet the needs of students and families.

Parent participation is integral to the success of WFCA and will continue to be solicited for the development of school goals and objectives. All parents agree to volunteer a minimum of 20 hours per school year. When two or more children from the same family are enrolled, parents shall be strongly encouraged to volunteer a total of 30 hours per school year. Parents can track volunteer hours via the student information system. To ensure that all parents and stakeholders understand the unique programming of the CSUSA model, parents and students are given thorough explanations of the curriculum, expectations, and requirements of WFCA prior to enrollment. This information is delivered through a variety of ways: open houses, published information, brochures, online applications, and website question/answer modules. After enrollment and the start of school, parents continue to have flexibility to monitor their child's progress online and/or through parent conferences. Because WFCA follows a continuous improvement model, parents have real-time access to their child's progress.

⁵ See [NC ACCESS Subgrant Application Process Guidance Document](#) for more detail.

This section is for Planning and Implementation, Implementation Only, and Replication subgrant applicants Only

D. Student Transition Planning

In five (5) pages or less (single-spaced), please provide a school closure plan. This section will be scored as “Complete” or “Incomplete”; there is no numerical score associated with this section. Exemplary plans will utilize the following best practices established by NACSA and scholarship on charter school closure:

- Form a Student Transition Committee (STC) – This committee will consist of one NC ACCESS program staff member (in an advisory capacity), at least two members of the school’s administrative team, at least three parents from the school, at least two members of the charter school’s board, and if possible, one to two (1-2) members of the LEA district student reassignment office in which the school is geographically located. This committee will plan activities related to family and student support during the closure process. The committee will establish a Student Transition Plan (discussed below) that focuses on student reassignment into high quality schools as quickly as possible following a school closure. The STC will work with quality local charter and district schools to establish enrollment preferences for displaced students.
- Develop a Student Transition Plan (STP) – The Transition Plan 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 STC 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 in the STP.

Please outline the proposed Student Transition Committee and Student Transition Plan below.

If a time comes that the Board of the LEA determines it would be in the best interest of the students to close the school, the following steps will be taken to create and Student Transition Committee and Plan. Within 24 hours of the Board vote, the committee will be formed with the following members:

NC ACCESS program staff member; » Charter School Board chair and one other Board member; » Principal and Vice Principal from the School; » lead Finance person from the School; » lead person from the School Faculty; » three parents including the President of the School Parent Organization; and designated Administrator from the Educational Management Organization.

The initial meeting shall set the calendar for the transition team, assign responsibilities to transition team members, and create the timeline for the school transition. After this meeting, the initial letter to parents and the school will be created and sent out with the Board decision, the timeline for closure, and where families and students can find information about the process. After parents are notified, the team will then notify all State and local agencies with all pertinent and relevant information needed for

closure. After the formal notifications are made, a press release will be generated and released for the general public. During this time, all ongoing and regular instruction will be taking place as is until the end of the school year. The school will make efforts to cancel all summer-time instruction.

Within 72 hours of the Board's decision to close the school, the Chair and school administrative staff shall convene meetings with both parents and school faculty separately. This meeting will include all information about the school closure including timelines, transition plans, and resources available to learn about and move forward after the school closure.

While the school year is continuing, administrative staff will work to ensure that all educational and student records are organized and secure. They will also ensure that all contact information for students, parents, families, and staff are updated for informational purposes. All school assets will continue to be covered by adequate insurance.

Within 10 days of the Board's decision, the Board Chair will send out a closure transition letter to all parents and families that will include, but not limited to the following information, the last day of school, closure policies, and information about local schools in the area available for transfer.

Throughout the closure process, the school staff will ensure constant communication with parents and families about where their student will be transitioning to. For students with IEPs, the school will ensure that all IDEA regulations and timelines are followed to transfer between programs. All final report cards will be given to students and their respective transferring schools within a 5-day period from the school compiling all of them. A master list will be updated and maintained for access by any regulating authorities.

After the last day of school, the Board and administrative staff will ensure that all closing filings are completed and submitted to the Internal Revenue Services, Department of Education, State of North Carolina, and any and all other State or local agencies. The school will maintain of all property and follow all regulations surrounding the disposition of the property. The property shall be categorized by its funding source to ensure that all government funded property is disposed of according to Federal and State regulations.

Upon the final disposition of all assets, the school shall compile and maintain all financial records and listings for all assets and liabilities during the final year of operations. These expenses will include, but are not limited to, payroll; pension obligations; accounts payable and receivable; and all remaining assets.

IV. BUDGET, BUDGET NARRATIVE, AND LOGIC MODEL

Applicants must submit a completed financial plan outlining the acceptable use of subgrant funds for the duration of the grant period. This application section is worth up to thirty (30) points.

A. Budget

Complete a proposed budget, using the [template](#) provided, outlining anticipated costs for the duration of the subgrant period. Please refer to the information provided in this RFA, the [NC ACCESS Subgrant Application Process Guidance Document](#), [nonregulatory guidance](#), and [Uniform Guidance Title 2 - Subtitle A - Chapter II - Part 200 Subpart E](#) when completing the budget.

Additionally, applicants should include the following provisions in the proposed budget:

1. Set aside three thousand dollars (\$3,000) in “Support – Travel, Conferences, and Meetings” in year one (1) to cover travel costs associated with the NC ACCESS Fellowship;
2. No more than fifty percent (50%) of the total subgrant funding may be expended by the end of year one (1);
3. No more than seventy-five percent (75%) of subgrant funding may be expended by the end of year two (2); and
4. The entire subgrant cannot be expended in less than three (3) years.

This application section is worth fifteen (15) points.

B. Budget Narrative

In five (5) pages or less (single-spaced), complete a budget narrative that:

- a. describes anticipated costs for the duration of the grant period, delineating planning and implementation expenditures;
- b. demonstrates financial viability beyond the expiration of the grant period; and
- c. describes how the applicant will have a high degree of autonomy over the budget and operations, including autonomy over personnel decisions.

This application section is worth ten (10) points.

Please outline the budget narrative below.

The budget request as submitted focuses funding on the following concepts for the school opening:

- Fund the technology needs of the school including laptops, tablets, desktops, smart boards, printers, and any other technology needed for classroom instruction and testing
- Funding for a contracted educational consultant service to come in during the 2nd year of operations to conduct an educational and operational needs assessment to assist the school in achieving its stated SMART goals
- Fund classroom supplies and educational materials needed during the school year for classroom instruction and management.
- Provide funding for professional development opportunities for educators and school leadership for the NC ACCESS Fellowship program and other identified opportunities to assist with the work towards the school’s identified goals.

Technology – The majority of funding for technology will come during the 1st and 4th year of the grant with the first year funding being used to purchase the initial items and the 4th year funding being used to refresh the technology based on IT guidelines and within Federal and State regulations. A smaller portion of funding is requested in the 5th year of the grant for any outstanding technology needs. Beyond the grant period, any technology needs will be met within budgeted charter school operating funds or Federal or State grants including IDEA for EC students and Title I for its program goals.

Educational Consultant – Funding for this provision begins in the 2nd year of funding and continues at a full rate through the 3rd year. These services will be used to identify, assess, and create a plan to address any gaps in services either educationally or operationally that hinder the achievement of benchmarks and the identified SMART goals. The baseline development will be created during the first two years of the grant funded activity, so the last two years funding is reduced to focus on data collection and analysis. The school anticipates that its goals will be met throughout the first 5 years of its operations, so a further consultant will not be needed, but the framework created will be utilized by staff going forward.

Supplies & Materials – Funds will be provided for classroom supplies and educational materials including classroom furniture, curriculum, office supplies such as paper and writing materials, educational materials needed for classroom instruction such as science equipment and art supplies, manipulatives, and other items needed for instruction and management. The requested costs will not cover the school costs, so the school's budgeted charter operating funds will be utilized to fund the difference. After the grant period, any supplies and materials needed will be funded with charter school operating funds and any awarded grant dollars within their own framework including Title I, Title III, Title IV, and IDEA.

Professional Development – Funds will be used throughout the grant period to provide opportunities to staff and school leadership to build capacity of educators for instructional achievement. The first year will be focused on providing the necessary costs for two staff members to participate in the NC ACCESS fellowship program. The remaining years will be focused on professional development to address any educational or operational needs identified as gaps in services for the school. Beyond the grant period, all professional development will be funded through budgeted charter school operating funds, Title II, Title I, or IDEA funds awarded to the school.

During the course of its operation, the Board will review and have final approval on the annual budget for each fiscal year the school it is in operation; they will receive and approve monthly financial reports as to how the budget is being utilized; they will have their questions and concerns answered timely by the Finance team of the EMO, and they will have the opportunity and right to make any modifications that follows any State and Federal guideline. The Board will also approve all educational personnel as they are hired, approval all terminations of school personnel upon recommendation of the Principal, receive a report on the operational personnel as they are managed by the Principal, and work with the EMO on the review and hiring/firing of the Principal.

C. Logic Model

Complete a Logic Model (see [appendix B](#) for template) demonstrating how actions and expenditures are expected to lead to specific outcomes. This application section is worth five (5) points.

V. COMPETITIVE PREFERENCE STANDARDS

Indicate if any of the following competitive preference standards apply to your existing/approved school. Please outline how the school meets any of the criteria outlined below and provide any additional evidences to support each selected status in Appendix C.

Applicants providing detailed plans for the following items may receive up to an additional three (3) points per standard.

Opening, expanding, or replicating a school in a rural or underserved urban area (i.e. without a high-quality school within fifteen (15) miles).	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Increasing the racial and ethnic diversity in their new, expanded, or replicated school.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
The inclusion of high school (9-12) grade levels.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Develop or manage a charter school focused on dropout recovery and academic reentry.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

VI. PRIORITY CONSIDERATION STATUS

Indicate if any of the following applies to your existing/approved school. Applicants meeting at least two of the following conditions will receive priority consideration designation, which may impact the distribution of subgrant awards when the number of applications receiving a passing score on the application rubric exceeds the number of subgrants to be awarded. Please outline how the school meets any of the criteria outlined below and provide any additional evidences to support each selected status in Appendix D.

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Economically disadvantaged students, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
As evidence of participation in applicable federal programs, have Title I status.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
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.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

VII. 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.

Gina Merrell

Signature of Charter School Authorized Representative

3/1/2020

Date

VIII. SUBGRANT APPLICATION APPENDICES

Please submit all applicable appendices as part of a completed application.

- A. If applicable, up to the last three years of available student assessment data for the school addressed in this application and, if applicable, all schools operated by the CMO/EMO overseeing the school addressed in this application. Include (if available):
 - i. NC State Report Card Letter Grade
 - ii. Student Achievement Percentages (including subgroup data)
 - iii. EVAAS Composites
 - iv. Graduation Rates
- B. Contractual Agreements with Partner Organizations (See item 7 of the application narrative)
- C. Evidence of Competitive Preference Standards
- D. Evidence of Priority Consideration Status
- E. Additional Supplementary Documentation

APPENDIX B – LOGIC MODEL TEMPLATE

Objectives
 Provide an academic environment that supports educational growth in reading and math for all students including those identified as educationally disadvantaged (ED). The first year should show 3% growth in 50% of the ED population with the same growth rate seen in 5% increments of the student population in proceeding year.

Inputs	Outputs		Outcomes and Impact		
	Activities	Participation	Short	Medium	Long
Provide appropriate technology needed for assessments, testing, and ongoing educational instruction.	Purchase technology to be utilized in all classrooms and shared learning environments	Students, Teachers, and Instructional Support Staff	Every enrolled student will have access to technology for instructional purposes.	ED students will see growth in testing scores for both reading and math throughout the school year.	ED Students will see high performing competency scores in both reading and math.
Provide supplies and materials needed for classroom instruction and management.	Provide tiered instruction to students identified by testing scores as needed either individual or small group instruction	Students, Teachers, Instructional Support staff, parents, and school leadership	Classrooms will have adequate supplies for instruction and management based on the needs of the teacher.	Teachers will provide feedback that their classrooms are sufficiently supplied with needed materials.	ED Students will see high performing competency scores in both reading and math
Professional development opportunities for instructional staff and school leadership	Provide professional development opportunities to instructional staff to build capacity in providing reading and math curriculum and instruction	Teachers, Instructional Support staff, School Leadership	Teachers and Instructional staff will have multiple internal and external opportunities for professional development.	Teachers will score high performance marks through evaluation for classroom instruction.	ED Students will see high performing competency scores in both reading and math
Create a baseline framework to identify strengths and gaps in services within the school and educational plans.	Contract with provider for expertise in developing a needs assessment	School Leadership, Contractor	A framework will be established for ongoing evaluation of educational and operational work.	School leadership will be able to utilize the framework to build in evaluation and analysis to the operational capacity of the school.	ED Students will see high performing competency scores in both reading and math

Assumptions
 The school will maintain a stable workforce for both educators and school leadership.

External Factors
 State and Local funding for charter operational funds to provide ongoing financial needs of the school.

CHARTER MANAGEMENT AGREEMENT

This **CHARTER MANAGEMENT AGREEMENT** (this “**Agreement**”) is made and entered into as of the ____ day of September, 2018 (the “**Effective Date**”), by and between Charter Schools USA at Wendell, LLC, a Florida limited liability company (“**CSUSA**”), and Triangle Charter Education Association, Inc., a North Carolina non-profit corporation (the “**Foundation**”). For purposes of this Agreement, CSUSA and the Foundation are referred to individually as a “**Party**” and collectively as the “**Parties.**”

RECITALS

WHEREAS, the Foundation desires to establish a public charter school in North Carolina known as Cardinal Charter Academy at Wendell Falls pursuant to N.C. Gen. Stat. § 115C-218 *et seq.* (the “**Charter School**”); and

WHEREAS, the Foundation is submitting an application to the North Carolina State Board of Education (the “**SBE**”) to establish the Charter School (the “**Charter Application**”); and

WHEREAS, CSUSA is in the business of managing, operating, and administering public charter schools; and

WHEREAS, the Foundation desires to engage CSUSA to manage, operate, and administer the Charter School, and CSUSA desires to be so engaged; and

WHEREAS, the Parties desire to memorialize the terms and conditions of such engagement in this Agreement;

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties agree as follows:

ARTICLE I CONTRACTING RELATIONSHIP

A. Authority. The Foundation represents and warrants that it is authorized by law to contract with CSUSA for the provision of certain charter management services. The Foundation further represents and warrants that if the Charter Application is approved by the SBE, the Foundation will enter into a charter contract with the SBE, authorizing the Foundation to establish, manage, operate, and administer the Charter School (the “**Charter Contract**”). For purposes of this Agreement, the Charter Application and the Charter Contract are referred to collectively as the “**Charter.**”

B. Agreement. To the maximum extent permitted by applicable law, the Foundation hereby contracts with CSUSA to perform the management functions set forth in Article III of this Agreement (the “**Management Functions**”). CSUSA shall perform the Management Functions in accordance with applicable law and at the direction of the Foundation. Although

the Management Functions include duties and responsibilities regarding student enrollment, performance, discipline, and special education, as well as curriculum and personnel, nothing in this Agreement is intended to nor shall limit or delegate the ultimate authority of the Foundation as set forth in N.C. Gen. Stat. § 115C-218 *et seq.*, applicable SBE policies, or the Charter.

C. Designation of Agents. The Foundation hereby designates the directors, officers, employees, and attorneys of CSUSA as agents of the Foundation having a legitimate educational interest such that they are entitled to access the education records of the Charter School and its students pursuant to 20 U.S.C. § 1232g, the Family Educational Rights and Privacy Act (FERPA), and other applicable privacy laws. Subject to its discretion, the Foundation also hereby authorizes CSUSA to communicate with and negotiate on behalf of the Foundation and the Charter School with all local, state, and federal agencies.

D. Status of the Parties. CSUSA is a Florida limited liability company, and not a division or part of the Foundation. The Foundation is a North Carolina non-profit corporation, and not a division or part of CSUSA. CSUSA shall perform the Management Functions as an independent contractor and except as set forth herein, this Agreement does not create a joint venture, principal-agent, or employer-employee relationship between the Parties or their respective employees or agents.

ARTICLE II TERM

This Agreement shall commence on the Effective Date and continue for the duration of the Charter, including any and all Charter renewals, unless terminated earlier pursuant to Article VII of this Agreement. Any such termination shall only be effective at the end of the then-current academic year.

ARTICLE III FUNCTIONS OF CSUSA

A. Responsibility. CSUSA shall be responsible and accountable to the Foundation for the operation and performance of the Charter School as set forth in this Agreement, the Charter, and applicable law. CSUSA's responsibility is expressly limited by: (i) the approved Annual Budget, as defined in Article V of this Agreement; and (ii) the availability of state funding to pay for the Management Functions. CSUSA shall not be required to expend funds for the Management Functions or the Charter School in excess of the amount set forth in the approved Annual Budget.

B. Educational Program. CSUSA agrees to implement the educational program set forth in the Charter (the "**Educational Program**"), which may be amended from time to time by the mutual consent of the Parties and, when required, the SBE and/or the North Carolina Department of Public Instruction. The Parties acknowledge that an essential principle of the Educational Program is its flexibility, adaptability, and capacity to change in the interest of continuous improvement and efficiency, and that the Foundation and CSUSA are interested in results, and not inflexible prescriptions. No less than annually, and as otherwise reasonably

requested by the Foundation, CSUSA will provide the Foundation with an updated progress report detailing the educational goals set forth in the Educational Program.

C. Management Functions. In accordance with the Foundation’s non-profit purpose, subject to the Foundation’s ultimate authority, consistent with the Charter, and pursuant to applicable law, CSUSA shall perform all management, operation, accounting, and administrative functions for the Charter School (the “**Management Functions**”), including without limitation:

1. The day-to-day management of the Charter School;
2. The recruitment and enrollment of students by various means, including without limitation, advertisements in newspapers of general circulation, mailings to parents and guardians of prospective students, and presentations to interested groups;
3. The implementation and administration of the Educational Program, including the selection of instructional materials, equipment, technology, and supplies;
4. The implementation and administration of extra-curricular and co-curricular activities and programs approved by the Foundation;
5. The performance of evaluations, assessments, and continuous improvements of and to the Educational Program, including reports of the same to the Foundation upon its request;
6. The management, selection, and application of technology services required to facilitate the operation of the Charter School;
7. The management of certain personnel functions, as set forth in Article VI of this Agreement;
8. The management of the business administration of the Charter School;
9. The accounting operations of the Charter School, including general ledger management and financial reporting;
10. The identification, application, and administration of grants to or for the Charter School, including in any audits related thereto;
11. The preparation and submission of the Annual Budget, as set forth in Article V of this Agreement; and

12. The performance of any other function necessary or expedient for the administration of the Charter School, including those set forth in this Article III.

D. Purchases. Purchases made by CSUSA on behalf of the Foundation with the Foundation's funds, such as non-proprietary instructional materials, books, supplies, and equipment will be the property of the Foundation. However, CSUSA shall own all proprietary rights in and to, and the Foundation's proprietary interest shall not include, curriculum or educational materials that are developed, copyrighted, or legally protected by CSUSA, including without limitation curriculum or educational materials that are developed by CSUSA with funds from the Foundation. CSUSA's educational materials and teaching techniques used by or at the Charter School shall only be subject to disclosure to the extent required by law. This provision does not apply to any capital items leased or purchased by CSUSA with CSUSA's own funds.

E. Subcontracts. CSUSA shall not subcontract the management, oversight, or operation of the Educational Program, except as specifically permitted in this Agreement or with approval of the Foundation. Otherwise, CSUSA reserves the right to subcontract any and all aspects of the Management Functions.

F. Place of Performance. Unless prohibited by applicable law, CSUSA reserves the right to perform the Management Functions other than the Educational Program, such as purchasing, professional development, and administrative functions, off-site.

G. Due Process Hearings. At the direction of the Foundation, CSUSA shall provide students of the Charter School with due process hearings in accordance with applicable law regarding student discipline, special education, confidentiality, and access to records. If necessary or advisable, CSUSA may retain legal counsel to assist with these hearings. Notwithstanding the foregoing, the Foundation shall retain the right and responsibility to provide such students with that due process required by law.

H. Rules and Procedures. From time to time, CSUSA shall recommend reasonable rules, regulations, procedures, and policies to the Foundation regarding the management, operation, and administration of the Charter School. Once adopted by the Foundation, CSUSA shall be authorized and directed to enforce such rules, regulations, procedures, and policies.

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

J. Student Performance Standards and Evaluation. CSUSA shall be responsible and accountable to the Foundation for the academic performance of the students who attend the Charter School. CSUSA will utilize assessment strategies required by the Charter and applicable law. The Foundation and CSUSA will cooperate in good faith to identify measures of and goals for Charter School students, including but not limited to, academic achievement and parent satisfaction. CSUSA shall perform its duties and responsibilities as set forth in this Agreement to the reasonable satisfaction of the Foundation.

K. Services to Disabled Students and Special Education. CSUSA shall provide special education services to students who attend the Charter School in conformity with the requirements of state and federal law. CSUSA may subcontract as necessary and appropriate for the provision of services to students whose special needs cannot be met within the Charter School's program, subject to the approval of the Foundation. Such services shall be provided in a manner that complies with local, state, and federal laws and applicable regulations and policies. Consistent herewith, the Foundation 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 approved Annual Budget. The Foundation, at the request of CSUSA, agrees to adjust the approved Annual Budget as necessary to provide such services to disabled and special needs students.

L. Contract between the Foundation and the SBE. CSUSA will not act in a manner that will cause the Foundation to be in breach of the Charter.

M. Unusual Events. CSUSA agrees to timely notify the Foundation and/or the School Administrator, as defined in Article XI of this Agreement, of any anticipated or known: (i) material health or safety issues; (ii) labor, employee, or funding issues, or (iii) any other issues that may adversely impact the Foundation's ability to comply with the Charter or this Agreement.

N. Student and Financial Records. All student and financial information related to the Charter School shall be available for inspection at the Charter School upon reasonable request and consistent with applicable law.

O. Charter School Records. The financial, educational, and student records pertaining to the Charter School are the property of the Foundation, and such records shall be subject to the provisions of N.C. Gen. Stat. § 132-1, *et seq.* (Public Records), and other applicable information laws. All such records shall be physically or electronically available upon request at the Charter School. Except as protected by the Charter or applicable law, the SBE and the public shall have access to the Charter School's records.

P. CSUSA Performance Goals. During the term of this Agreement, CSUSA shall use its commercially reasonable best efforts to:

1. Timely submit all reports required by this Agreement to the Foundation;
2. Strictly adhere to the approved Annual Budget, with no aggregate cost over-runs; and
3. Meet or exceed the student performance goals contained in the Charter.

**ARTICLE IV
OBLIGATIONS OF THE FOUNDATION**

A. Good Faith Obligation. The Foundation shall be responsible for the fiscal and academic policies of the Charter School. To assist the Foundation, CSUSA shall, from time to time, recommend such policies to the Foundation. The Foundation shall exercise good faith in considering all such recommendations of CSUSA.

B. Assistance to CSUSA. The Foundation shall cooperate with CSUSA in furnishing all information and submitting all forms and reports required by this Agreement, including timely notice of all Foundation meetings. The Foundation shall timely furnish CSUSA all documents and records necessary for CSUSA to properly perform its responsibilities under this Agreement.

C. Unusual Events. The Foundation agrees to timely notify CSUSA of any anticipated or known: (i) material health or safety issues; (ii) labor, employee, or funding issues, or (iii) any other issues that may adversely impact CSUSA's ability to comply with this Agreement.

D. Retained Authority. The Foundation shall retain the authority to make reasonable regulations relative to anything necessary for the proper establishment, maintenance, management, and carrying on of the Charter School, including regulations relative to the conduct of students while in attendance at the Charter School or en route to and from the Charter School.

E. Food Service. The Foundation shall manage, operate, and administer, or shall authorize CSUSA to manage, operate, and administer, the food service program for the Charter School, as required by applicable law, including without limitation, the National School Lunch Program at 7 C.F.R. § 210.1, *et seq.*

**ARTICLE V
FINANCIAL ARRANGEMENTS**

A. Revenues. All revenues received by the Foundation for or on behalf of the Charter School (the "**Revenues**") shall be deposited in the Foundation's depository account with a financial institution mutually acceptable to the Foundation and CSUSA. The signatories on the account shall only be the members of the Foundation's Board of Directors and, as designated by the Foundation, the employees of CSUSA. Interest income earned on the account shall accrue to the Foundation. Except as specifically excluded by this Agreement, Revenues shall include, without limitation:

1. Funds for students enrolled in the Charter School;
2. Special education funds provided by federal, state, and local governments that are directly allocable to special education students enrolled in the Charter School;

3. Academically and intellectually gifted funds provided by federal, state, and local governments that are directly allocable to academically and intellectually gifted students enrolled in the Charter School;
4. At-risk funds provided by federal, state, and local governments that are directly allocable to at-risk students enrolled in the Charter School;
5. Funds provided by federal, state, and local governments that are directly allocable to students enrolled in the Charter School with limited English proficiency;
6. Federal, state, and local grants, including Title I and Charter School start-up funds;
7. Other grants and donations, except to the extent CSUSA is not required or involved in soliciting, administering, or managing such grants or donations; and
8. Fees charged to students and others for extra services as and to the extent permitted by law.

B. Expenditure of Revenue and Operating Advances. The Revenues shall be expended by CSUSA in accordance with the approved Annual Budget and as otherwise authorized by the Foundation. 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. To the extent that there are not sufficient funds in the Foundation's operating account to pay the operating expenses of the Charter School, CSUSA may, at CSUSA's option, deposit funds into the Foundation's operating account for that purpose ("**Operating Advances**"). Operating Advances shall only be made in accordance with the approved Annual Budget. The Foundation shall reimburse CSUSA for all Operating Advances, together with interest earned thereon, as and when the funds become available; provided, however, that if, at the end of each Fiscal Year (as defined below), the total Revenues, after payment of the debt service and operating expenses of the Charter School, are insufficient to reimburse the Operating Advances attributable to such Fiscal Year, CSUSA may forgive the un-reimbursed balance of the Operating Advances, including interest earned thereon.

C. Fiscal Year and Annual Budget. The Foundation shall operate the Charter School on a fiscal year beginning July 1 and ending June 30 of the following year ("**Fiscal Year**"). On or before May 31 of each Fiscal Year, CSUSA shall prepare and submit to the Foundation for its review a proposed, balanced, annual budget for the Charter School's upcoming Fiscal Year (the "**Annual Budget**"). The Annual Budget shall account for: (i) Revenues, (ii) operating expenses, (iii) reserve expenses, (iv) audit expenses, and (v) the fund balance. The Foundation shall approve the Annual Budget, as may be reasonably revised by the Foundation in consultation with CSUSA, by June 30 of the then-current Fiscal Year. CSUSA shall perform all Management Functions in accordance with the approved Annual Budget, applicable law, the Charter, and as directed by the SBE.

D. Amendments to the Annual Budget. During the Fiscal Year, CSUSA may submit proposed amendments to the approved Annual Budget to the Foundation to account for changes in student enrollment, student needs, and other variables. Any such amendment shall only be valid if approved by the express vote of the Foundation’s Board of Directors.

E. Management Fee. In exchange for providing the charter services hereunder, including the Management Functions, CSUSA shall be entitled to compensation in an amount equal to 15% of the Revenues, or a lesser amount if agreed to in writing by CSUSA (the “Management Fee”). The Management Fee shall be set forth in the Annual Budget.

F. Availability of Funds. CSUSA 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 approved Annual Budget.

G. Financial Reporting. CSUSA shall provide the Foundation with:

1. Annually, the proposed Annual Budget, as required by the terms of this Agreement;
2. As requested, financial statements of Revenues received by, expenditures for services to, and expenses incurred on behalf of the Charter School, whether incurred on or off-site;
3. Monthly, financial statements by the 30th day of the following month, including a balance sheet, statement of Revenues, and expenditures for the Charter School; and
4. Periodically, other information necessary to enable the Foundation to: (i) monitor CSUSA’s performance under this Agreement, (ii) evaluate CSUSA’s provision of the Management Functions, and (iii) comply with applicable law, including the demands and requests of the SBE.

H. Access to Records. CSUSA shall keep accurate financial records pertaining to its operation of the Charter School, together with all Charter School financial records prepared by or in possession of CSUSA, and shall retain all such records for a period of time as may be required by the Charter. CSUSA and the Foundation shall also maintain the proper confidentiality of personnel, students, and other records as required by law.

I. Annual Audit. The Foundation shall select and retain an independent auditor to conduct an annual audit of the Charter School in accordance with the Charter. Subject to applicable law, all finance and other records of CSUSA related to the Charter School will be made available to the Foundation’s independent auditor.

**ARTICLE VI
PERSONNEL & TRAINING**

A. Personnel. With the exception of Teachers (as defined below), CSUSA shall select, hire, evaluate, and where necessary, transfer, discipline and terminate qualified personnel and support staff for the Charter School (“**Personnel**”). Personnel shall be employees of CSUSA and shall be paid pursuant to the approved Annual Budget. CSUSA shall have the right and responsibility to determine the number and functions of Personnel. In the discretion of CSUSA, Personnel may work at the Charter School on a full or part time basis. If assigned to the Charter School on a part time basis, Personnel may work at other schools managed or operated by CSUSA.

B. School Administrator. CSUSA shall select, hire, evaluate, and where necessary, transfer, discipline, and terminate one or more qualified administrators for the Charter School (the “**School Administrator**”). The School Administrator shall be an employee of CSUSA and shall be paid pursuant to the approved Annual Budget. CSUSA shall consult with the Foundation regarding the hiring of the School Administrator and CSUSA shall remove the School Administrator from the Charter School if the Foundation is or becomes reasonably dissatisfied with his or her performance.

C. Teachers. CSUSA shall recommend to the Foundation for its consideration and approval qualified teachers for the Charter School (“**Teachers**”). All Teachers shall be jointly employed by the Foundation and CSUSA, such that they may be included in the compensation, benefits, payroll administration, and employment policies and practices of CSUSA; provided, however, that in all circumstances, the Foundation shall ultimately control the hiring and firing of the Teachers in accordance with N.C. Gen. Stat. § 115C-218.90(a)(1). In the discretion of CSUSA, Teachers may work at the Charter School on a full or part time basis. If assigned to the Charter School on a part time basis, Teachers may also work at other schools managed or operated by CSUSA.

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

E. Limitations on Discretion. All decisions made by CSUSA, and any discretion exercised by CSUSA, regarding the selecting, hiring, evaluating, transferring, disciplining, and terminating of Personnel and the School Administrator shall be consistent with the approved Annual Budget, the Charter, applicable law, and any parameters adopted by the Foundation regarding the Educational Program.

**ARTICLE VII
DEFAULT**

A. Default. Events of default under this Agreement shall be limited to the following

(each, an “Event of Default”):

1. The Foundation fails to make any payment due hereunder within ten (10) days after the date such payment was due;
2. The Foundation materially breaches any of its other obligations hereunder and fails to cure such breach within sixty (60) days after notice of such breach;
3. The Foundation adopts a policy or fails to adopt a policy regarding the Charter School which prevents CSUSA from satisfying its obligations hereunder;
4. The Foundation fails to adopt an Annual Budget before June 30 of the then-current Fiscal Year, or adopts an Annual Budget that prevents CSUSA from satisfying its obligations hereunder;
5. The Charter is revoked or suspended by the SBE or other governmental authority;
6. CSUSA commences a case or proceeding or files a petition for bankruptcy, reorganization, liquidation or dissolution, is adjudicated insolvent or bankrupt, or applies to a tribunal for a receiver, intervener, conservator, or trustee for itself or for any substantial part of its property, or any such action is commenced against it and the same remains pending for more than sixty (60) days;
7. CSUSA is found by an administrative or judicial body to have made fraudulent use of funds, or an administrative or judicial body revokes any license that may be required for CSUSA to carry on its business and perform its obligations and functions under this Agreement; and
8. CSUSA materially breaches this Agreement, which shall be limited to: (i) failure to account for expenditures or pay the Charter School’s operating costs (provided funds are available to do so); (ii) failure to follow policies, procedures, rules, or curriculum duly adopted by the Foundation which are not in violation of this Agreement or applicable law; (iii) failure to realize student achievement objectives outlined in the Charter; (iv) failure to take reasonable efforts to protect the health, safety, and welfare of the students at the Charter School; and (v) violation of applicable law. In the event of a material breach, CSUSA shall have (60) days after receipt of written notice to remedy such breach.

B. Remedies. Upon the occurrence of an uncured Event of Default by either Party, the non-breaching Party shall be entitled to pursue all remedies available under law or equity, including without limitation, terminating this Agreement upon seven (7) days prior written

notice. Such termination, however, shall only become effective following the end of the then-current academic year. In the event of termination of this Agreement for any reason by either Party prior to the end of this Agreement's term, CSUSA may, for a fee reasonably acceptable to CSUSA, provide the Foundation with reasonable assistance for up to thirty (30) days to assist in the transition to another administrative or structural arrangement (although CSUSA shall not be required to provide any assistance to another management company or service provider). However, CSUSA will abide by all state laws that govern transition obligations, including but not limited to:

1. Transferring all student records to such entity;
2. Transferring any and all other non-proprietary information and providing necessary assistance to the new program or education service provider to ensure the least disruption of the Charter School operation as a result of the termination of this Agreement; and
3. Transferring or assigning to the Foundation all contracts, agreements, licenses, permissions, and other rights and privileges related to the operation of the Charter School, including, at CSUSA's option, assignment of contracts for Personnel and the School Administrator.

ARTICLE VIII INDEMNIFICATION & LIMITATION OF LIABILITY

Each Party does hereby indemnify, defend, and hold the other, including their respective directors, partners, officers, employees, agents, representatives, and attorneys, harmless from and against any and all claims, actions, damages, expenses, losses or awards which arise out of its own negligence, acts or omissions, or noncompliance or breach of any of the terms, conditions, warranties, representations, or undertakings contained in or made pursuant to this Agreement. Notwithstanding the foregoing and except for claims of death or bodily injury resulting from CSUSA's gross negligence or willful misconduct, CSUSA's total, aggregate liability to the Foundation for any reason and upon any cause of action, whether in tort, contract, or otherwise, shall be limited to the total amount of all Management Fees received by CSUSA from the Foundation under this Agreement.

ARTICLE IX INSURANCE

A. Insurance Coverage. Each Party shall maintain insurance in the coverage amounts as may be required by the Charter, with the other Party listed as an additional insured. Such insurance shall be purchased by CSUSA using the Revenues. 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 also comply with any reasonable information or reporting requirements required by the other Party's insurers.

B. Workers' Compensation Insurance. Each party shall maintain workers' compensation insurance as required by the Charter and applicable law, covering their respective employees.

ARTICLE X REPRESENTATIONS & WARRANTIES

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

B. CSUSA Representations and Warranties. CSUSA represents and warrants that it is a limited liability company authorized to conduct business in the State of North Carolina. CSUSA will comply with all registration and licensing requirements relating to conducting business under this Agreement. The Foundation agrees to assist CSUSA in applying for such licenses and permits and in obtaining such approvals and consents.

C. Mutual Warranties. The Charter School and CSUSA 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 XI MISCELLANEOUS

A. Sole Agreement. This Agreement supersedes and replaces any and all prior agreements and understandings between the Foundation and CSUSA regarding the management, operation, or administration of the Charter School.

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, however, that either Party may terminate this Agreement in accordance with the termination provisions contained herein if sufficient grounds exist as provided in Article VII of this Agreement.

C. Governing Law and Waiver of Jury Trial. This Agreement shall be construed, interpreted, governed, and enforced pursuant to the laws of the State of North Carolina, without regard to its conflict-of-laws principles. The Parties hereby waive the right to a jury trial in any action, proceeding, or counterclaim brought by either Party against the other.

D. Agreement in Entirety. This Agreement constitutes the entire agreement of the parties.

E. Official Notices. All notices and other communications required by the terms of this Agreement shall be in writing and sent to the Parties at the facsimile number or address set forth below. Notice may be given by: (i) 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 the Foundation shall be sent to the current address of the then-current Foundation President, with a copy to the then-current Foundation attorney. For purposes of the aforesaid, the address of the Parties, including the address of the initial Foundation President and attorney, are as follows:

Triangle Charter Education Association, Inc.

Allen Taylor
11408 Lostwood Lane
Raleigh, NC 27614
Phone: 919-757-2343

With a copy to:

Donna Rascoe
Board Attorney
Cranfill Sumner & Hartzog, LLP
5420 Wade Park Road, Suite 300
Raleigh, NC 27607
Phone: 919-863-8795
Fax: 919 863-3552

CSUSA:

Chairman, Chief Executive Officer
Charter Schools USA
800 Corporate Drive, #124
Ft. Lauderdale, FL 33334
Phone: 954-202-3500
Fax: 954-202-2047

With a copy to:

Tripp Scott, P.A.
Attn: Edward J. Pozzuoli
110 S.E. Sixth Street
15th Floor
Fort Lauderdale, FL 33301
Phone: 954-525-7500
Fax: 954-761-8475

F. Assignment. Either Party may assign this Agreement with the written consent of the other.

G. Amendment. This Agreement shall not be altered, amended, modified or supplemented except in writing, as approved by the Foundation and signed by the President of the Foundation and the CEO of CSUSA.

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. Cost and Expenses. If any Party commences an action against the other as a result of a breach or alleged breach of this Agreement, the prevailing party shall be entitled to have and recover from the losing Party its reasonable costs and attorneys' fees (including those incurred at appellate levels).

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

K. Compliance with Charter Contract. The parties to this Agreement agree to comply with the terms and conditions set forth in the Charter Contract.

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.

M. Severability. If any term or condition of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the terms and conditions set forth herein shall remain in full force and effect and shall, in no way, be affected, impaired, or invalidated by such term or condition, and the Parties shall use their reasonable best efforts to find and employ an alternative means to achieve the same or substantially the same result as that contemplated by such term or condition.

N. Survival. The following Sections shall survive the termination or expiration of this Agreement: III, VII, VIII, and XI.

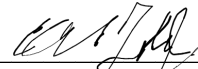
SIGNATURE PAGE TO FOLLOW

IN WITNESS WHEREOF, the Parties have executed this Agreement as of the Effective Date.

Charter Schools USA at Wendell Falls, Inc.

By: _____
Name: Jonathan Hage
Title: President
Date: _____

Triangle Charter Education Association, Inc.

By:  _____
Name: Allen Taylor
Title: President
Date: 02 / 27 / 2020

Appendices B

Current Charter Schools operating under an Educational Management agreement with Charter Schools USA:

Triangle Charter Education Association

School Name	SY2019/2020 Grade
Cardinal Charter Academy	B
Cardinal Charter Academy at Wendell Falls	Opening July 1, 2020

Union County Charter Education Association

School Name	SY2019/2020 Grade
Union Preparatory Academy at Indian Trail	B

West Lake Educational Foundation

School Name	SY2019/2020 Grade
West Lake Preparatory Academy	No Data, opened July 1, 2019

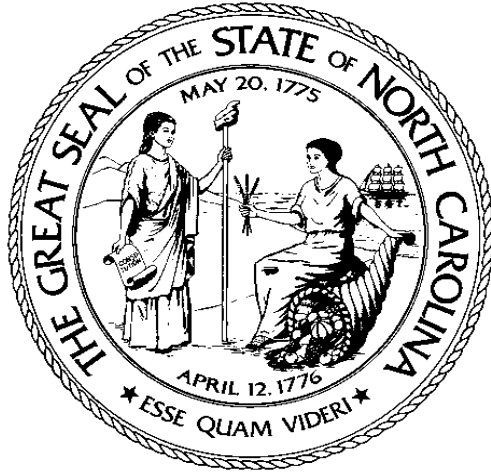
Steele Creek Charter Educational Foundation

School Name	SY2019/2020 Grade
Steele Creek Preparatory Academy	No Data, opened July 1, 2019

North Carolina Charter Educational Foundation

School Name	SY2019/2020 Grade
Cabarrus Charter Academy	D
Concord Lake STEAM Academy	D
Langtree Charter Academy	B
Iredell Charter Academy	D

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: **Cardinal Academy at Wendall Falls**

Reviewer Name: **Constance Cuttino**

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, students with disabilities, immigrant students, and migrant students.

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 one hundred (100) points. Applicants must score at least eighty (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 seven (7) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Application Narrative (70 points possible)
 - a. Enrollment Projections (10 points)
 - b. Education Plan (30 points)
 - c. Operations Plan (30 points)
 - d. If applicable, a school closure plan (check for completeness)
- IV. Budget, Budget Narrative, and Logic Model (30 points possible)
 - a. Budget (15 points)
 - b. Budget Narrative (10 points)
 - c. Logic Model (5 points)
- V. Competitive Preference Standards (optional; up to 12 points possible)
- VI. Priority Consideration Status (optional; up to 4 standards possible)
- VII. Certification
- VIII. Appendices (there is no scoring associated with section VII; information will supplement sections III, IV, V, and VI)

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.”

Once all seven (7) rating sections are scored individually, the evaluator 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 (VII); and (b) score at least eighty (80) combined points between sections (III), (IV), and (V). Section (VI) 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, will be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

Characteristics of a strong response:	
<ul style="list-style-type: none"> All applicant contact information is complete and accurate. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
The applicant provides contact information that is complete and accurate.	

Section II – Assurances

Characteristics of a strong response:	
<ul style="list-style-type: none"> Assurances are signed. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
The applicant provides all signed assurances as required.	

Section III – Application Narrative

A. Enrollment Projections			
A.1 Explain the rationale behind the projected enrollment figures; specifically, how the projected numbers are both ambitious and feasible.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> 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, students with disabilities, immigrant students, and migrant students. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The applicant successfully provides enrollment projections for 2020-2025 which includes the target area and neighboring counties to be served. The information provided clearly shows a significant increase of economically disadvantaged students needing to be served by the program. The community of Wendell was chosen due to its population growth and lack of school choice in the area. Information is provided indicating there is a lack of public schools within the immediate area, and public schools within the surrounding areas are currently operating at capacity and cannot accommodate the projected population growth without overcrowding; this is the rationale behind the projected increase.			18-19
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

A.2 Describe how the school plans to implement a weighted lottery.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Clear description of the process and mechanism for implementing a weighted lottery. Clearly articulated subgroup category weights and/or enrollment percentage goals. Rationale for the applied weights are reasonable and justified. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
A description of the lottery process is presented by the applicant indicating that a priority lottery will include staff, board, and sibling preferences and the remaining available lottery seats will be held in order to achieve 15% of students meeting the ED criteria. To ensure the number of FRL seats are made available per grade, the applicant will ensure the number of openings will be reserved for ED priority, thereby, ensuring a balance of admitted students across each grade.			19-20
Weaknesses/Areas of Concern			Page
No weakness noted.			19-20

Section III – Application Narrative (cont.)

B. Education Plan			
B.1 Provide a General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Statement clearly articulates the school's desire and plan to eliminate any and all barriers to enrollment for all students, especially educationally disadvantaged students. 			
Points Possible:	2	Points Earned:	2
Strengths			Page
Several successful strategies are described detailing the processes to ensure equal access to the project including GEPA guidelines and reducing barriers which prevent students from attending the programs. For example, plans include ensuring Spanish speaking staff are available to meet with parents and students, ensuring applications be made available in English and Spanish, and posting materials in locations of public access.			21
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

B.2 Provide at least three (3) school-specific subgrant program goals. Subgrant goals must be SMART (specific, measurable, achievable, rigorous, and time-bound).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> All goals are specific, measurable, achievable, rigorous, and time-bound. Goals are aligned to the NC ACCESS Program and activities in the subgrant application. 			
Points Possible:	3	Points Earned:	2
Strengths			Page
The applicant presents objectives that are geared towards closing the achievement gap among students. For example, one goal is to improve reading proficiency among students by 50%, which will be measured by EOG/local assessments. All goals are aligned with the NC ACCESS program and are designed to address the needs of ED students by providing academic support and other services to help them succeed.			21
Weaknesses/Areas of Concern			Page
The objectives are without baseline information which would help determine if they are measurable and meet the SMART format. For example, the applicant proposes to increase reading proficiency by 50%, however no information is provided to show the current reading proficiency rate which when compared to student assessment would measure increase.			21

B.3 Describe how the school's academic program is or will be specifically tailored to meet the needs of educationally disadvantaged students. Include specific strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.			
--	--	--	--

Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear and comprehensive description of the strategies being utilized to serve educationally disadvantaged students, especially intervention, differentiation, and support services. • A robust and quality curriculum overview, supported by research, with a plan for implementation. • Evidence the proposed academic plan will be appropriate and effective for growing all students while at the same time closing achievement gaps. 			
Points Possible:	10	Points Earned:	10
Strengths			Page
The applicant successfully describes the Response to Intervention approach to be used which offers several detailed descriptions of the learning tiers to be implemented to support educationally disadvantaged students. For example, Tier 3: SST-Driven Learning includes several intervention strategies including Push-in/Pull-out Instruction (i.e. outside of their core classes, students receive intensive instruction based on their skill level), Tutoring/Extended Day instruction and a Progress Monitoring Plan (PMP), describing the current proficiency level of the students, targeted interventions needed, frequency of interventions and the expected outcome or goal of the intervention. The ELL program is detailed and designed to support students through a structured English immersion process. Once assessment results are collected, an instructional plan for students who qualify for the ELL program will be created and the integration of scaffolding methods to address the ELL student and setting goals for achieving mastery of the NC English Language Proficiency Standards.			22-26
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

B.4 Explain how the charter school's education plan compares to or differs from that of the local LEA(s).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear articulation of the services and programs offered by the school that are similar and/or different from offerings in the local LEA. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The 8-Step Process educational plan describes a continuous improvement model focusing on student performance that is aligned with school-wide planning, instruction, assessment, and support efforts. The model includes several distinctive components such as data disaggregation, timeline development, instructional focus, assessment, tutorials, enrichment, maintenance and monitoring all of which support improved academic achievement. According to the applicant, the education model differs from the local LEA as it provides individualized, data-driven instruction within a culture of high expectations and achievement that emphasizes 21st century learning in a technology-rich environment.			26-27
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

B.5 Describe the school's discipline and school climate philosophy and how it supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • A clear vision for school culture or climate that will promote a positive and supportive academic environment and is inclusive for a diverse student body. • Coherent plan for creating and/or sustaining the intended culture for students, teachers, administrators, and parents. • Discipline plan that has clear policies and procedures and has thoughtful consideration of the needs and rights of educationally disadvantaged students, especially students with disabilities. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The applicant successfully describes a school culture and climate that will provide support and promote a positive learning environment for students. A specific Code of Conduct plan is provided to parents and students each school year to ensure all families are aware of behavior expectations and consequences, due process and grievance procedures. The plan is appropriate since all discipline decisions, especially those related to students with disabilities, will be determined on a case-by-case basis.			27-28
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

B.6 Describe how the school's calendar supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Calendar and schedule support implementation of the academic plan, including supporting the development of educationally disadvantaged students and aligning with the mission, vision, and goals of the school. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
Evidence is provided to show that the daily school schedule is designed to accommodate common grade planning periods. Once per month teachers attend professional development sessions with topics aligned with professional standards and State Core Fundamentals strategic implementation plan which includes school initiatives, survey results, teacher demand, or other focused areas geared towards school improvement. Some topics include: (1) Expectations and Procedures (aligned to schoolwide behavior plan), (2) Introduce Balanced Assessment System, (3) Instructional Software and others.			28-29
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

Section III – Application Narrative (cont.)

C. Operations Plan			
C.1 Detail any partnerships the charter school maintains or plans to develop to support educationally disadvantaged students, including a 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.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear delineation of roles and responsibilities between the school and CMO/EMO. • Articulation of budgetary and decision-making autonomy of the board or directors. • Evidence of contractual agreements provided in appendix A. 			
Points Possible:	2	Points Earned:	2
Strengths			Page
A precise description of the EMO partnership is presented including roles and responsibilities to ensure the success of the program. For example, the EMO will be financially responsible for the daily operations and provide detailed accounting each month describing all school revenues and expenditures. Additionally, the EMO must report the current student enrollment, waiting list students and responsible for the successful operation of the school and its ability to deliver academic results. Evidence of a contractual agreement is also presented by the applicant, outlining other responsibilities.			30-31 & Appendices
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

C.2 Describe how the school's staffing structure, capacity, and diversity will be sufficient to meet the needs of all students, particularly educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Staffing levels for each year are robust and aligned with the educational program and conducive to the school's success. • There is clear capacity to support the specialized needs of students, particularly students with disabilities and English learners. • Comprehensive plan to support student's non-academic needs, including through counselors, behavior specialists, psychologists, etc. • Clear plan to recruit, retain, and support a diverse teaching staff. 			
Points Possible:	3	Points Earned:	3
Strengths			Page
Effective avenues to recruit qualified staff are described including posting jobs on the school website, education job fairs, college/university, national channels and minority referring organizations to help ensure that the workforce is reflective of the diverse community served. The goal is to hire one EC teacher in Year 1, one in Year 3 and one of whom will serve as Lead EC teacher to oversee EC compliance; an EC aide will also be hired. General education teachers, including certified in ELL, EC, or teachers with demonstrated experience in differentiated instruction including extending knowledge for higher performing students will also be hired. Retention will be part of the principal's annual evaluation and goal-setting system.			31-32

Weaknesses/Areas of Concern	Page
No weakness noted.	N/A

C.3 Describe the school's marketing and recruiting plan, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students, including efforts to overcome any potential language barriers.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Compelling student outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support. • Emphasis on strategies that will provide equal access to educationally disadvantaged students. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The marketing and recruitment plan is well described and will successfully attract families of educationally disadvantaged students for the purposes of enrollment. Numerous activities will include use of local media (newspapers, radio, email blast, website), social media (Facebook, Twitter, Instagram etc.). Public information meetings will be advertised through direct mail, email, newspaper ads, and flyers. The program will also work with area civic/community centers, YMCA, Regional Library, and Park and Recreation Centers to post information and hold community outreach events. Information will also be distributed through flyers to local preschools, daycare centers, churches and other methods will be used.			32-33
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

C.4 Describe how the school currently does or will provide a transportation plan that accommodates and supports educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear description of transportation plan that includes anticipated routes, extracurricular activities, before- and after-school care, etc. • Description of how the school will arrange transportation for special needs students where necessary. • Clear articulation of how the proposed plan will eliminate transportation barriers for educationally disadvantaged students. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The applicant clearly describes strategies that will prevent transportation barriers to the school. The goal is to purchase at least one bus to provide support to students residing within a 2-4 mile radius of the school. There are also plans to help coordinate transportation amongst parents that include ride-sharing and carpooling. If necessary, the school will contract with a district-certified and licensed school bus company to provide transportation.			33-34
Weaknesses/Areas of Concern			Page

No weakness noted.	N/A
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C.5 Describe how the school currently does or will provide a school lunch plan that accommodates and supports educationally disadvantaged students. Provide information about participation in the National School Lunch Program or a comparable, comprehensive lunch program.	
Characteristics of a strong response:	
<ul style="list-style-type: none"> • A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines. • Specific strategies to ensure educationally disadvantaged students receive daily meals and are not identifiable as qualifying for free or reduced-price lunch. • A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement. 	
Points Possible:	Points Earned:
5	5
Strengths	
The plans to provide school lunches are detailed and include contracting with a national food service vendor to provide breakfast and lunch. The food vendor will provide a quality, unitized meal program that includes all the components of a full-service operation. Staff will be properly trained to operate the food service program. If the school's application for participation in this program is not approved, food will still be provided to students who would have otherwise qualified under NSLP regulations.	34
Weaknesses/Areas of Concern	
No weakness noted.	N/A

C.6 Describe how the school's professional development plan supports and is tailored to the development of educationally disadvantaged students.	
Characteristics of a strong response:	
<ul style="list-style-type: none"> • Professional development standards, opportunities, leadership, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement, particularly for educationally disadvantaged students. • Thoughtful plan for professional development in the areas of special education, English learners, and serving low-income students, including implementation of IEP's or personalized learning plans, discipline, and communication with families. 	
Points Possible:	Points Earned:
5	5
Strengths	
Evidence is provided clearly describing a professional development plan that will allow opportunities for teachers/educators to be properly trained to support economically disadvantaged students. The daily school schedule will accommodate common grade planning periods. One schoolwide meeting per month will be devoted to topics associated with Professional Standards and specific needs identified through professional learning communities and monthly data chats.	34-36
Weaknesses/Areas of Concern	
No weakness noted.	N/A

C.7 Describe the school's plan to engage families and implement a parent/community advisory council.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear plan for informing and educating parents on school policies, procedures, and programming. • A sound and compelling plan for engaging parents and community partners in the design and life of the school through the advisory council, including recruitment strategies, duties, and authority. 			
Points Possible:	5	Points Earned:	2
Strengths			Page
The applicant provides information indicating that parents volunteer with the program at least 20 hours or more per year.			37
Weaknesses/Areas of Concern			Page
The applicant does not provide detailed information describing how parents are actively involved through an advisory council process and no recruitment strategies or other information is provided.			37
Application Narrative Total (70 points possible):			66

Section III – Application Narrative (cont.)

D. Student Transition Planning	
Outline the proposed Student Transition Committee and Student Transition Plan.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Clear and specific plan to recruit, develop, and retain a Student Transition Committee. • Comprehensive Student Transition Plan that outlines timelines, communication strategies, clear transition and closure plans, and strategies for informing families of their options. 	
Status:	X Complete Incomplete <input type="checkbox"/>
Strengths	Page
A thorough student transition plan is described and will support students and parents in the process. A transition committee consisting of key persons will be formed and within 10 days of the Board’s decision, the Board Chair will send out a closure transition letter to all parents and families including closing logistics and information about local schools in the area available for transfer. The final disposition process is clearly described including maintaining all financial records, and assets and liabilities during the final year of operations.	38-39
Weaknesses/Areas of Concern	Page
No weakness noted.	N/A

Section IV – Budget, Budget Narrative, and Logic Model

A. Budget			
Complete a proposed budget outlining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Outlines complete, realistic, and viable costs for the duration 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. 			
Points Possible:	15	Points Earned:	15
Strengths			Page
The budget presented is aligned with the program activities to be provided. For example, funds will be used for professional development, equipment and other supports which will help to successfully implement the program.			41
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

B. Budget Narrative			
Complete a budget narrative explaining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant. • Demonstrates financial viability beyond the expiration of the grant period. • There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students. 			
Points Possible:	10	Points Earned:	6
Strengths			Page
The applicant provides evidence of financial viability which is evidenced in the EMO agreement and narrative which documents the success of other charter schools the EMO has managed and financial roles/responsibilities.			41-42
Weaknesses/Areas of Concern			Page
The budget narrative does not provide well-supported costs assumptions and calculations that would show how cost were derived and show how funds will reasonably support the program.			41-42

C. Logic Model			
Complete a Logic Model demonstrating how actions and expenditures are expected to lead to specific outcomes.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Clearly articulates how actions and expenditures are expected to lead to specific outcomes. • Aligns clearly and directly to the application narrative. 			
Points Possible:	5	Points Earned:	5
Strengths			Page

The applicant demonstrates a rationale for the proposed project, as evidenced by the logic model presented. The inputs align with the outputs, outcomes and impact. The consistent review and analysis of data will allow for the project to address challenges as they arise throughout the project year.	48
Weaknesses/Areas of Concern	Page
No weakness noted.	N/A

Budget, Budget Narrative, and Logic Model Total (30 points possible):	26
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Section V – Competitive Preference Standards

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
Comments (if applicable)			Page
The applicant does not address this criteria.			N/A

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page
The applicant does not address this criteria.			N/A

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page
The applicant does not address this criteria.			N/A

Develop or manage a charter school focused on dropout recovery and academic reentry.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page
The applicant does not address this criteria.			N/A

Competitive Preference Standards Total (12 points possible):			0
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
The applicant does not address this criteria.	N/A
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
The applicant does not address this criteria.	
As evidence of participation in applicable federal programs, have Title I status.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
The applicant does not address this criteria.	N/A
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.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
The applicant does not address this criteria.	N/A

Priority Consideration Status Total (4 standards possible):	0
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Section VIII – Certification

Characteristics of a strong response:	
<ul style="list-style-type: none"> Application is signed and certified. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
The application is signed and certified.	

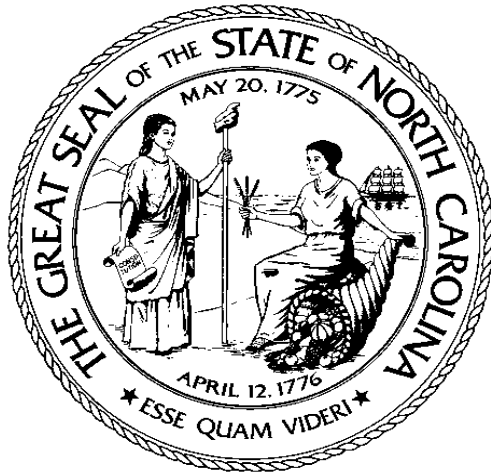
Summary Ratings

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section II – Assurances	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section VIII – Certification	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Total (all sections must be <i>complete</i> to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Application Narrative	70	66
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	26
Section V – Competitive Preference Standards	Up to 12	0
Total (must receive at least <i>80 points</i> to pass)	100	92

Priority Standards	Standards Possible	Standards Met
Section VI – 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 eighty (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: **Cardinal Charter Academy at Wendell Falls**

Reviewer Name: **Danielle J. Allen**

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, students with disabilities, immigrant students, and migrant students.

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 one hundred (100) points. Applicants must score at least eighty (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 seven (7) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Application Narrative (70 points possible)
 - a. Enrollment Projections (10 points)
 - b. Education Plan (30 points)
 - c. Operations Plan (30 points)
 - d. If applicable, a school closure plan (check for completeness)
- IV. Budget, Budget Narrative, and Logic Model (30 points possible)
 - a. Budget (15 points)
 - b. Budget Narrative (10 points)
 - c. Logic Model (5 points)
- V. Competitive Preference Standards (optional; up to 12 points possible)
- VI. Priority Consideration Status (optional; up to 4 standards possible)
- VII. Certification
- VIII. Appendices (there is no scoring associated with section VII; information will supplement sections III, IV, V, and VI)

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.”

Once all seven (7) rating sections are scored individually, the evaluator 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 (VII); and (b) score at least eighty (80) combined points between sections (III), (IV), and (V). Section (VI) 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, will be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

Characteristics of a strong response:	
<ul style="list-style-type: none"> All applicant contact information is complete and accurate. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Applicant contact information is complete and accurate.	

Section II – Assurances

Characteristics of a strong response:	
<ul style="list-style-type: none"> Assurances are signed. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Assurances are signed.	

Section III – Application Narrative

A. Enrollment Projections			
A.1 Explain the rationale behind the projected enrollment figures; specifically, how the projected numbers are both ambitious and feasible.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • 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, students with disabilities, immigrant students, and migrant students. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
Enrollment projections are outlined for years 1-5 of the subgrant, making them complete.			
Weaknesses/Areas of Concern			Page
The applicant proposes to increase the ED population from 15% in year 1 to 20% in year 5. They do not anticipate any increase in ED students from year 4 to year 5. A 5% increase over 4 years and 0% increase in the final year is not ambitious and does not demonstrate a significant increase of ED students. The applicant does not fully explain how they arrived at their ED enrollment projection, given that the FRPL population within a 15-minute driving radius is 50%, and the percentage of ED students in Wake County Schools averaged 33%, according to the applicant.			18
			18

A.2 Describe how the school plans to implement a weighted lottery.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear description of the process and mechanism for implementing a weighted lottery. • Clearly articulated subgroup category weights and/or enrollment percentage goals. • Rationale for the applied weights are reasonable and justified. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The applicant states that ED status will be verified and the verification documents will not be retained. The applicant articulates that the threshold for ED seats in year 1 will be 15%. The principal will identify the number of FRL seats to make available per grade level each year.			20
Weaknesses/Areas of Concern			Page
The applicant states that they will institute a priority lottery for available lottery seats in order to achieve 15% of students meeting the ED criteria reflected in the school population. The rationale provided (ED percentages in the nearby area) does not explain the low threshold, given the percentages of ED students in the surrounding community and county. The applicant does not specifically state when ED documentation will be required to be submitted (at the time of lottery application)and/or after a student has been given a seat in the ED lottery?).			20

Section III – Application Narrative (cont.)

B. Education Plan			
B.1 Provide a General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Statement clearly articulates the school’s desire and plan to eliminate any and all barriers to enrollment for all students, especially educationally disadvantaged students. 			
Points Possible:	2	Points Earned:	1
Strengths			Page
The applicant states that Spanish speaking staff will be available to meet with parents and students, and promotional materials will be provided in multiple languages.			21
Weaknesses/Areas of Concern			Page
The applicant states that “implementation activities will be designed to reach the entire school community including all racial/ethnic groups within”, but does not explain how activities will be designed to reach particular racial/ethnic groups.			21

B.2 Provide at least three (3) school-specific subgrant program goals. Subgrant goals must be SMART (specific, measurable, achievable, rigorous, and time-bound).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> All goals are specific, measurable, achievable, rigorous, and time-bound. Goals are aligned to the NC ACCESS Program and activities in the subgrant application. 			
Points Possible:	3	Points Earned:	2
Strengths			Page
All of the stated goals are time bound and measurable.			21
Weaknesses/Areas of Concern			Page
The goals provided by the applicant only address years 1 and 2 of the subgrant period. It is unclear what goals/expectations the applicant has for its ED student population in years 3-5 of the subgrant. Two of the three goals provided state that 50% of all students will improve their reading/math proficiency. However, in the “measurable” column, the applicant states 50% of identified ED students. It is unclear exactly which students the goal is targeting. The second goal states that 75% of all students will improve their reading proficiency. However, in the “measurable” column, the applicant states 55% of ED students. It is unclear exactly what percentage and which students this goal is targeting. A goal of only 50% of students improving their proficiency by 3 points is not ambitious. What is the expectation for the other half of the student population?			21

B.3 Describe how the school’s academic program is or will be specifically tailored to meet the needs of educationally disadvantaged students. Include specific strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear and comprehensive description of the strategies being utilized to serve educationally disadvantaged students, especially intervention, differentiation, and support services. • A robust and quality curriculum overview, supported by research, with a plan for implementation. • Evidence the proposed academic plan will be appropriate and effective for growing all students while at the same time closing achievement gaps. 			
Points Possible:	10	Points Earned:	8
Strengths			Page
The applicant outlines proposed strategies to meet the needs of EL and EC students. The applicant outlines tiered interventions to be used under MTSS/RtI.			22-25
Weaknesses/Areas of Concern			Page
In general, the applicant includes components of an education program that can be beneficial to students (all students, not particularly those who are ED). However, the applicant provides very little detail about how the education program will be implemented. For example, the applicant describes Saturday/extended day tutoring as an option to help students who are falling behind. The applicant does not describe who will staff the tutorial sessions, how they will be paid (applicant’s budget does not appear to include paying tutors), or whether transportation will be provided to get students to and from sessions, etc.			23

B.4 Explain how the charter school’s education plan compares to or differs from that of the local LEA(s).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear articulation of the services and programs offered by the school that are similar and/or different from offerings in the local LEA. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The applicant states that their academic calendar exceeds the required 1025 instructional hours. The applicant states that they will use a continuous improvement model to maximize student achievement.			26-27
Weaknesses/Areas of Concern			Page
The academic plan offered by the school is essentially the same as that offered by the local LEA. This is not a weakness or area of concern, per se, however, it is unclear what the school will do differently from the LEA in order to see better results.			26-27

B.5 Describe the school’s discipline and school climate philosophy and how it supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • A clear vision for school culture or climate that will promote a positive and supportive academic environment and is inclusive for a diverse student body. 			

<ul style="list-style-type: none"> • Coherent plan for creating and/or sustaining the intended culture for students, teachers, administrators, and parents. • Discipline plan that has clear policies and procedures and has thoughtful consideration of the needs and rights of educationally disadvantaged students, especially students with disabilities. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The applicant states that they will “establish a school culture in which academics, a sense of community, and innovations flourish”. The applicant states that they will adhere to all federal and state laws regarding discipline of all students, including those with disabilities.			27
Weaknesses/Areas of Concern			Page
The applicant does not explain exactly how they intend to establish a positive school culture, nor do they outline a plan for sustaining the intended culture for students, teachers, administrators and parents.			27-28

B.6 Describe how the school’s calendar supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Calendar and schedule support implementation of the academic plan, including supporting the development of educationally disadvantaged students and aligning with the mission, vision, and goals of the school. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The calendar includes time for common planning and professional development. The professional development plan is comprehensive and contains topics suited for the education of all students, generally.			28
Weaknesses/Areas of Concern			Page
The applicant lists the various topics scheduled for PD, but none of them appear to be particularly targeted or suited to the needs of ED students.			

Section III – Application Narrative (cont.)

C. Operations Plan			
C.1 Detail any partnerships the charter school maintains or plans to develop to support educationally disadvantaged students, including a 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.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear delineation of roles and responsibilities between the school and CMO/EMO. • Articulation of budgetary and decision-making autonomy of the board or directors. • Evidence of contractual agreements provided in appendix A. 			
Points Possible:	2	Points Earned:	1
Strengths			Page
The applicant has a partnership with CSUSA and has successfully opened another school. CSUSA has successfully operated several schools in NC. The contract is provided in the appendix. The applicant states that schools operated by CSUSA are exceeding county and state proficiency in many grades and subject areas. The applicant cites charter school governance and fiscal responsibility relationships as reasons to replicate this model.			30-31
Weaknesses/Areas of Concern			Page
Of the six schools operated by CSUSA that have academic data, 3 earned Bs in 2019-20 and 3 earned Ds. It is unclear how the applicant is confident that their school will be successful, particularly, with ED students. The applicant does not provide demographic data showing the achievement of ED students, specifically, at the other schools operated by CSUSA. It is unclear that the management company has a track record of A) serving high percentages of ED students, and B) serving them well, as evidenced by high academic achievement, strong school culture, and low rates of suspension/expulsion. Restorative justice and alternatives to removing students from the classroom has not been discussed in this application. It is unclear whether or not the applicant has considered carefully that aspect of serving ED students.			Appendix

C.2 Describe how the school’s staffing structure, capacity, and diversity will be sufficient to meet the needs of all students, particularly educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Staffing levels for each year are robust and aligned with the educational program and conducive to the school’s success. • There is clear capacity to support the specialized needs of students, particularly students with disabilities and English learners. • Comprehensive plan to support student’s non-academic needs, including through counselors, behavior specialists, psychologists, etc. • Clear plan to recruit, retain, and support a diverse teaching staff. 			
Points Possible:	3	Points Earned:	2
Strengths			Page
The applicant states that the Board and CSUSA have created a 5-year staffing plan to cover the needs of the school. The specifics of the staffing plan (staffing levels for each year) were not outlined in the subgrant application. The applicant states that they will recruit through			31-32

“minority referring organizations” but does not elaborate on how they plan to cultivate those relationships or give examples of specifically the types of organizations that they will approach to recruit minority candidates.	
Weaknesses/Areas of Concern	Page
The applicant states they will “seek teachers also certified in ELL”, but it is unclear if the applicant has committed to hiring at least one EL teacher (or the number needed to adequately serve its students) during the subgrant period. The applicant does not outline a plan to support students’ non-academic needs, including through counselors, behavioral specialists, psychologists, etc.	32

C.3 Describe the school’s marketing and recruiting plan, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students, including efforts to overcome any potential language barriers.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Compelling student outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support. • Emphasis on strategies that will provide equal access to educationally disadvantaged students. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The applicant intends to market the school through a variety of print and digital media. The applicant intends to communicate and engage families through enrollment information sessions, speaking at church and civic organizations, etc.			32
Weaknesses/Areas of Concern			Page
The marketing plan outlined by the applicant is generic and does not appear to specifically target students from ED backgrounds. There is little to no emphasis on strategies that will provide equal access to ED students. The GEPA statement earlier in the application mentioned providing materials in multiple languages, but the marketing plan itself is silent on those provisions.			32-33

C.4 Describe how the school currently does or will provide a transportation plan that accommodates and supports educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear description of transportation plan that includes anticipated routes, extracurricular activities, before- and after-school care, etc. • Description of how the school will arrange transportation for special needs students where necessary. • Clear articulation of how the proposed plan will eliminate transportation barriers for educationally disadvantaged students. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The applicant states that transportation will be provided for students with disabilities as required by the IEP.			33-34
Weaknesses/Areas of Concern			Page
The applicant’s transportation plan relies primarily upon carpool to transport students to and from school. The applicant provides no data to indicate that this will be sufficient, particularly for ED students. The applicant states that they will purchase one bus for the			33-34

transportation of students. The applicant does not outline anticipated routes, whether the bus will serve cluster stops or go door-to-door, it does not outline when or how the school will determine whether students need transportation, whether transportation will be provided for extracurricular activities, Saturday/afterschool tutoring, etc.	
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C.5 Describe how the school currently does or will provide a school lunch plan that accommodates and supports educationally disadvantaged students. Provide information about participation in the National School Lunch Program or a comparable, comprehensive lunch program.	
Characteristics of a strong response: <ul style="list-style-type: none"> • A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines. • Specific strategies to ensure educationally disadvantaged students receive daily meals and are not identifiable as qualifying for free or reduced-price lunch. • A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement. 	
Points Possible:	Points Earned:
5	4
Strengths	
The applicant intends to participate in the NSLP. Applications will be completed in advance of the school year and reimbursements will be submitted monthly. If the application for participation in the NSLP is not accepted, the school will continue to serve FRPL to students who qualify.	34
Weaknesses/Areas of Concern	
Page	
It is unclear when/how the school will determine which students are eligible for FRPL. The applicant does not provide any data or estimates on how much providing lunch will cost (in the event that it is not reimbursed).	

C.6 Describe how the school’s professional development plan supports and is tailored to the development of educationally disadvantaged students.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Professional development standards, opportunities, leadership, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement, particularly for educationally disadvantaged students. • Thoughtful plan for professional development in the areas of special education, English learners, and serving low-income students, including implementation of IEP’s or personalized learning plans, discipline, and communication with families. 	
Points Possible:	Points Earned:
5	4
Strengths	
The applicant’s calendar provides for common planning and professional development. The applicant intends to implement Teacher Learning Communities and the Beginning Teacher Support Program.	36
Weaknesses/Areas of Concern	
Page	
The professional development plan does not appear particularly suited to the needs of ED students. PD in the areas of special education, English learners, and serving low income students is not explicitly outlined or included.	

C.7 Describe the school’s plan to engage families and implement a parent/community advisory council.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Clear plan for informing and educating parents on school policies, procedures, and programming. • A sound and compelling plan for engaging parents and community partners in the design and life of the school through the advisory council, including recruitment strategies, duties, and authority. 	
Points Possible:	5
Points Earned:	4
Strengths	
The applicant states that they will follow the CSUSA Education Model which includes a comprehensive parental involvement program (with a requirement that parents volunteer a minimum of 20 hours per year) and a family-school-community partnership model.	
Weaknesses/Areas of Concern	
The applicant does not outline a clear plan for informing and educating parents on school policies, procedures, and programming. The applicant does not outline a plan for engaging parents and community partners through an advisory council. The applicant does not detail any anticipated barriers to parent volunteering/engagement and how they intend to remove those barriers.	
Application Narrative Total (70 points possible):	
54	

Section III – Application Narrative (cont.)

D. Student Transition Planning	
Outline the proposed Student Transition Committee and Student Transition Plan.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Clear and specific plan to recruit, develop, and retain a Student Transition Committee. • Comprehensive Student Transition Plan that outlines timelines, communication strategies, clear transition and closure plans, and strategies for informing families of their options. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Strengths	Page
The applicant outlines how and when the STC will be developed as well as their responsibilities. The applicant outlines timeline for milestones prior to school closing. The applicant details communication strategies to be used during the closing process.	38-39
Weaknesses/Areas of Concern	Page
No weaknesses noted.	N/A

Section IV – Budget, Budget Narrative, and Logic Model

A. Budget			
Complete a proposed budget outlining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Outlines complete, realistic, and viable costs for the duration 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. 			
Points Possible:	15	Points Earned:	10
Strengths			Page
The budget includes line items for educational consultant, technology, professional development, and classroom supplies.			Budget
Weaknesses/Areas of Concern			Page
The budget is extremely vague and provides few specifics about what the funds will be used for (how many computers will be purchased, for example). Much more detail is needed to ensure the proposed plan is suitable for ED students. The professional development line item is vague. It is unclear who the applicant will hire to provide PD, whether it will be on site or not, if they will use a “train the trainer” model, how they intend to provide for viability beyond the grant period, etc. The applicant mentioned contracted services in the application, but it is unclear if those services will be covered by the school’s budget or the subgrant. The budget does not appear to include line items to address students’ socioemotional health, behavioral issues, etc. The applicant stated that they have budgeted ~\$50K for one bus. This line item does not appear in budget; it is unclear whether this will be covered by school’s budget or the subgrant.			Budget

B. Budget Narrative			
Complete a budget narrative explaining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant. • Demonstrates financial viability beyond the expiration of the grant period. • There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students. 			
Points Possible:	10	Points Earned:	7
Strengths			Page
The subgrant funds to be used for technology needs of the school, classroom supplies, and PD are detailed. The applicant outlines plans for viability beyond the expiration of the grant period.			41-42
Weaknesses/Areas of Concern			Page
The narrative outlines that technology will be a major expenditure of subgrant funds. However, the applicant has not provided details about whether they intend to implement a one-to-one initiative, how they will ensure that ED students have access at home to completing assignments, etc. The budget itself provides very few details about exactly what			41

the applicant intends to buy under the technology and equipment line item. The narrative outlines that an educational consultant will come in year 2 to conduct a needs assessment for achieving the stated SMART goals. However, two of the three goals are set for year 1. It is unclear how the consultant can help with those two goals if he/she will not be hired until year 2. The narrative does not speak to the aspect of the proposed plan to support students' socioemotional learning, behavioral challenges, mental/emotional health, etc..	
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C. Logic Model			
Complete a Logic Model demonstrating how actions and expenditures are expected to lead to specific outcomes.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Clearly articulates how actions and expenditures are expected to lead to specific outcomes. Aligns clearly and directly to the application narrative. 			
Points Possible:	5	Points Earned:	3
Strengths			Page
The logic model includes academic achievement as the intended long-term outcome.			48
Weaknesses/Areas of Concern			Page
ED students and their comprehensive needs are not fully addressed by the logic model. The model omits school culture, behavioral/mental health, wraparound services, etc. that ED students often require. Inputs are not particularly tailored to the needs of ED students.			48
Budget, Budget Narrative, and Logic Model Total (30 points possible):			20

Section V – Competitive Preference Standards

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
Comments (if applicable)			Page

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page

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

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

Competitive Preference Standards Total (12 points possible):			0
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
As evidence of participation in applicable federal programs, have Title I status.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
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.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page

Priority Consideration Status Total (4 standards possible):	0
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Section VIII – Certification

Characteristics of a strong response:	
<ul style="list-style-type: none"> Application is signed and certified. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Application is signed and certified.	

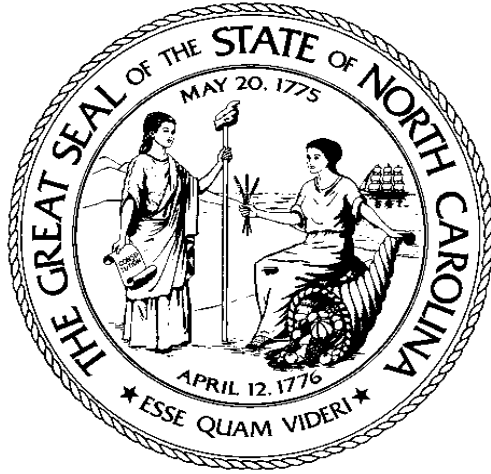
Summary Ratings

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section II – Assurances	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section VIII – Certification	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Total (<i>all sections must be complete to pass</i>)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Application Narrative	70	54
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	20
Section V – Competitive Preference Standards	Up to 12	0
Total (<i>must receive at least 80 points to pass</i>)	100	74

Priority Standards	Standards Possible	Standards Met
Section VI – 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 eighty (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 type="checkbox"/> Pass
	<input checked="" type="checkbox"/> Fail



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

Applicant: **Wendell Falls**

Reviewer Name: **Polly Drew**

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, students with disabilities, immigrant students, and migrant students.

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 one hundred (100) points. Applicants must score at least eighty (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 seven (7) total rating sections to complete:

- I. Applicant Contact Information
- II. Signed Assurances
- III. Application Narrative (70 points possible)
 - a. Enrollment Projections (10 points)
 - b. Education Plan (30 points)
 - c. Operations Plan (30 points)
 - d. If applicable, a school closure plan (check for completeness)
- IV. Budget, Budget Narrative, and Logic Model (30 points possible)
 - a. Budget (15 points)
 - b. Budget Narrative (10 points)
 - c. Logic Model (5 points)
- V. Competitive Preference Standards (optional; up to 12 points possible)
- VI. Priority Consideration Status (optional; up to 4 standards possible)
- VII. Certification
- VIII. Appendices (there is no scoring associated with section VII; information will supplement sections III, IV, V, and VI)

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.”

Once all seven (7) rating sections are scored individually, the evaluator 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 (VII); and (b) score at least eighty (80) combined points between sections (III), (IV), and (V). Section (VI) 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, will be available to the public.*

Application Scoring Rubric

Section I – Application Contact Information

Characteristics of a strong response: <ul style="list-style-type: none">All applicant contact information is complete and accurate.	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Applicant contact information is complete and accurate.	

Section II – Assurances

Characteristics of a strong response: <ul style="list-style-type: none">Assurances are signed.	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Assurances are signed.	

Section III – Application Narrative

A. Enrollment Projections	
A.1 Explain the rationale behind the projected enrollment figures; specifically, how the projected numbers are both ambitious and feasible.	
Characteristics of a strong response: <ul style="list-style-type: none"> • 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, students with disabilities, immigrant students, and migrant students. 	
Points Possible:	5
Points Earned:	4
Strengths	
Percent of ED students increases each year. Percent and numerical increases are reasonable and realistic.	5
Weaknesses/Areas of Concern	
I would not consider these projections for increasing the number of ED students ambitious. The constant total enrollment and the increase in ED students in the last few years is not explained.	5

A.2 Describe how the school plans to implement a weighted lottery.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Clear description of the process and mechanism for implementing a weighted lottery. • Clearly articulated subgroup category weights and/or enrollment percentage goals. • Rationale for the applied weights are reasonable and justified. 	
Points Possible:	5
Points Earned:	4
Strengths	
The proposed plan around available “seats” reserved for ED students, and the proposed process to check and verify ED status is a strength.	7
Weaknesses/Areas of Concern	
There is some confusion around why they can only preference ED priority once, and not repetitively.	7

Section III – Application Narrative (cont.)

B. Education Plan			
B.1 Provide a General Education Provision Act (GEPA) statement demonstrating how the school has or will eliminate any and all barriers to enrollment for educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Statement clearly articulates the school's desire and plan to eliminate any and all barriers to enrollment for all students, especially educationally disadvantaged students. 			
Points Possible:	2	Points Earned:	1
Strengths			Page
The approach that is proposed will include multiple languages, as well as Spanish-speaking individuals for in-person interest sessions, orientations, etc.			8
Weaknesses/Areas of Concern			Page
The areas of public access is vague and not communicated clearly. I encourage partnerships with community and regional organizations to support marketing.			8

B.2 Provide at least three (3) school-specific subgrant program goals. Subgrant goals must be SMART (specific, measurable, achievable, rigorous, and time-bound).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> All goals are specific, measurable, achievable, rigorous, and time-bound. Goals are aligned to the NC ACCESS Program and activities in the subgrant application. 			
Points Possible:	3	Points Earned:	2
Strengths			Page
Goals are specific and measurable. The goals were time-bound and align to content achievement aligned with NC Access.			8
Weaknesses/Areas of Concern			Page
The goals mixed "all students" and ED students which led to confusion about the goals of the Access grant impacting all student academics.			8

B.3 Describe how the school's academic program is or will be specifically tailored to meet the needs of educationally disadvantaged students. Include specific strategies the charter school currently uses or plans to use to serve educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Clear and comprehensive description of the strategies being utilized to serve educationally disadvantaged students, especially intervention, differentiation, and support services. A robust and quality curriculum overview, supported by research, with a plan for implementation. Evidence the proposed academic plan will be appropriate and effective for growing all students while at the same time closing achievement gaps. 			
Points Possible:	10	Points Earned:	8
Strengths			Page
The supports for EC students are very innovative and aligned to research EL (ELL) services.			12

Weaknesses/Areas of Concern	Page
The curriculum overview is lacking; specifically, since their 3 goals are reading and mathematics specific.	12

B.4 Explain how the charter school's education plan compares to or differs from that of the local LEA(s).			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear articulation of the services and programs offered by the school that are similar and/or different from offerings in the local LEA. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
The framework of the 8 step process and the extra hours of the day are strengths.			14
Weaknesses/Areas of Concern			Page
A more elaborate description about how the framework actually works would have been helpful. The interpretation of this section is that the local LEA does not look at data or use technology. This is not substantiated and is a bold claim.			14

B.5 Describe the school's discipline and school climate philosophy and how it supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • A clear vision for school culture or climate that will promote a positive and supportive academic environment and is inclusive for a diverse student body. • Coherent plan for creating and/or sustaining the intended culture for students, teachers, administrators, and parents. • Discipline plan that has clear policies and procedures and has thoughtful consideration of the needs and rights of educationally disadvantaged students, especially students with disabilities. 			
Points Possible:	5	Points Earned:	3
Strengths			Page
No strengths noted.			14-15
Weaknesses/Areas of Concern			Page
The section does not include information related to daily routines and processes and philosophies related to establishing the learning environment. The section focuses on behaviors and punishments and does not deal with thoughtful consideration of proactive research-based approaches to these topics.			14-15

B.6 Describe how the school's calendar supports the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Calendar and schedule support implementation of the academic plan, including supporting the development of educationally disadvantaged students and aligning with the mission, vision, and goals of the school. 			
Points Possible:	5	Points Earned:	4
Strengths			Page

PD is important and this section focuses on PD for teachers.	15-16
Weaknesses/Areas of Concern	Page
Nothing is focused on the development of students- extra time in school for support, after school programs, extra hours of instruction, and summer or intercession programs, etc.	15-16

Section III – Application Narrative (cont.)

C. Operations Plan			
C.1 Detail any partnerships the charter school maintains or plans to develop to support educationally disadvantaged students, including a 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.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear delineation of roles and responsibilities between the school and CMO/EMO. • Articulation of budgetary and decision-making autonomy of the board or directors. • Evidence of contractual agreements provided in appendix A. 			
Points Possible:	2	Points Earned:	1
Strengths			Page
Elaborate, detailed section about all that CSUSA does for the school.			17-18
Weaknesses/Areas of Concern			Page
No roles and responsibilities and partners are mentioned outside of their governing body (CSUSA). The comment that CSUSA has successful schools is a bold statement. It is not clear how legal consultation applies to this prompt.			17-18

C.2 Describe how the school's staffing structure, capacity, and diversity will be sufficient to meet the needs of all students, particularly educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Staffing levels for each year are robust and aligned with the educational program and conducive to the school's success. • There is clear capacity to support the specialized needs of students, particularly students with disabilities and English learners. • Comprehensive plan to support student's non-academic needs, including through counselors, behavior specialists, psychologists, etc. • Clear plan to recruit, retain, and support a diverse teaching staff. 			
Points Possible:	3	Points Earned:	2
Strengths			Page
There is a long list of possible ideas. EC is mentioned and referenced.			19
Weaknesses/Areas of Concern			Page
I recommend staffing goals that reflect diversity. The list is nice but there is a lack of specifics. There is no information about the current diversity level of the staff.			19

C.3 Describe the school's marketing and recruiting plan, with an emphasis on strategies to provide outreach to the families of educationally disadvantaged students, including efforts to overcome any potential language barriers.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Compelling student outreach plan that includes community, family, and student involvement, and that is realistic and likely to foster student retention and community support. • Emphasis on strategies that will provide equal access to educationally disadvantaged students. 			

Points Possible:	5	Points Earned:	4
Strengths			Page
There is a thorough and detailed approach to reaching multiple subgroups of ED students in a variety of ways.			
Weaknesses/Areas of Concern			Page
It is not clear on whose role it is to lead and work on these efforts.			

C.4 Describe how the school currently does or will provide a transportation plan that accommodates and supports educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • Clear description of transportation plan that includes anticipated routes, extracurricular activities, before- and after-school care, etc. • Description of how the school will arrange transportation for special needs students where necessary. • Clear articulation of how the proposed plan will eliminate transportation barriers for educationally disadvantaged students. 			
Points Possible:	5	Points Earned:	3
Strengths			Page
A bus is included in the budget.			20
Weaknesses/Areas of Concern			Page
A school bus has been included in the budget. This section makes it seem like it will only be used if needed. The carpool option does not seem to make logical sense based on the geographic focus on specific neighborhoods and areas of Wake County.			20

C.5 Describe how the school currently does or will provide a school lunch plan that accommodates and supports educationally disadvantaged students. Provide information about participation in the National School Lunch Program or a comparable, comprehensive lunch program.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> • A clear description of how the school will offer food service to all students, adhering to all nutritional guidelines. • Specific strategies to ensure educationally disadvantaged students receive daily meals and are not identifiable as qualifying for free or reduced-price lunch. • A plan to collect free and reduced-price lunch information, including procedures to receive reimbursement. 			
Points Possible:	5	Points Earned:	4
Strengths			Page
Processes are outlined and described about how meals will be provided and kept track of.			21
Weaknesses/Areas of Concern			Page
Reference to new facility-use of "will"- wondering about their experience with NSLP and the process of providing food.			21

C.6 Describe how the school's professional development plan supports and is tailored to the development of educationally disadvantaged students.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Professional development standards, opportunities, leadership, and calendar/scheduling effectively support the education program and are likely to maximize success in improving student achievement, particularly for educationally disadvantaged students. Thoughtful plan for professional development in the areas of special education, English learners, and serving low-income students, including implementation of IEP's or personalized learning plans, discipline, and communication with families. 			
Points Possible:	5	Points Earned:	3
Strengths			Page
Long list with a lot of topics.			22-23
Weaknesses/Areas of Concern			Page
PD is comprehensive yet very fragmented and not as focused as it could be. PLCs and planning are included; it is unclear on whether they count as PD. A lot of the topics are not ED specific and seem very general.			22-23

C.7 Describe the school's plan to engage families and implement a parent/community advisory council.			
Characteristics of a strong response:			
<ul style="list-style-type: none"> Clear plan for informing and educating parents on school policies, procedures, and programming. A sound and compelling plan for engaging parents and community partners in the design and life of the school through the advisory council, including recruitment strategies, duties, and authority. 			
Points Possible:	5	Points Earned:	2
Strengths			Page
The model is established and used already.			24
Weaknesses/Areas of Concern			Page
ED students who are experiencing poverty at times do not have parents who can participate or do the things mentioned. There is a lack of ways to engage parents from populations that have been historically marginalized who are not privileged enough to attend the events and do the things included.			24

Application Narrative Total (70 points possible):	49
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Section III – Application Narrative (cont.)

D. Student Transition Planning	
Outline the proposed Student Transition Committee and Student Transition Plan.	
Characteristics of a strong response: <ul style="list-style-type: none"> • Clear and specific plan to recruit, develop, and retain a Student Transition Committee. • Comprehensive Student Transition Plan that outlines timelines, communication strategies, clear transition and closure plans, and strategies for informing families of their options. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Strengths	Page
Weaknesses/Areas of Concern	Page

Section IV – Budget, Budget Narrative, and Logic Model

A. Budget			
Complete a proposed budget outlining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Outlines complete, realistic, and viable costs for the duration 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. 			
Points Possible:	15	Points Earned:	12
Strengths			Page
All costs are accounted for and realistic.			28
Weaknesses/Areas of Concern			Page
The budget is focused on technology, equipment, and instructional supplies. They are general expenditures expected with opening a new school.			28

B. Budget Narrative			
Complete a budget narrative explaining anticipated costs for the duration of the subgrant period.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Clearly explains reasonable, well-supported cost assumptions anticipated for the duration of the grant. • Demonstrates financial viability beyond the expiration of the grant period. • There is clear alignment between the budget, budget narrative, and the proposed plan to support educationally disadvantaged students. 			
Points Possible:	10	Points Earned:	8
Strengths			Page
All costs are accounted for and realistic.			28
Weaknesses/Areas of Concern			Page
The budget is focused on technology, equipment, and instructional supplies. They are general expenditures expected with opening a new school.			28

C. Logic Model			
Complete a Logic Model demonstrating how actions and expenditures are expected to lead to specific outcomes.			
Characteristics of a strong response: <ul style="list-style-type: none"> • Clearly articulates how actions and expenditures are expected to lead to specific outcomes. • Aligns clearly and directly to the application narrative. 			
Points Possible:	5	Points Earned:	5
Strengths			Page
The logic model is aligned, appropriate, specific.			

Weaknesses/Areas of Concern	Page
No weaknesses noted.	N/A

Budget, Budget Narrative, and Logic Model Total (30 points possible):	25
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Section V – Competitive Preference Standards

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
Comments (if applicable)			Page

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page

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

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

Competitive Preference Standards Total (12 points possible):			0
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
Economically disadvantaged, English learners, and students with disabilities have proficiency rates higher than the state average for their subgroup.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
As evidence of participation in applicable federal programs, have Title I status.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page
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.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Comments (if applicable)	Page

Priority Consideration Status Total (4 standards possible):	0
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Section VIII – Certification

Characteristics of a strong response:	
<ul style="list-style-type: none"> Application is signed and certified. 	
Status:	Complete <input checked="" type="checkbox"/> Incomplete <input type="checkbox"/>
Comments (if applicable)	
Application is signed and certified.	

Summary Ratings

General Standards	Status
Section I – Application Contact Information	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section II – Assurances	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section VIII – Certification	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Total (all sections must be <i>complete</i> to pass)	<input checked="" type="checkbox"/> Pass <input type="checkbox"/> Fail

Technical Standards	Points Possible	Points Earned
Section III – Application Narrative	70	49
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	25
Section V – Competitive Preference Standards	Up to 12	0
Total (must receive at least <i>80 points</i> to pass)	100	74

Priority Standards	Standards Possible	Standards Met
Section VI – 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 eighty (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 type="checkbox"/> Pass
	<input checked="" type="checkbox"/> Fail