



NC ACCESS Subgrant Program Application Recommendation
Hobgood Charter School
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 Hobgood Charter School was evaluated by a Review Committee consisting of the following individuals:

Evaluator	Role
Dr. Drew Polly	External Evaluator
Dr. Danielle Allen	External Evaluator
Connie Cuttino	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 Hobgood Charter School (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

Hobgood Charter School 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 Hobgood Charter School 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 Hobgood Charter School be awarded an Implementation Only subgrant for the 2020 application cycle.

Subgrant Application for Hobgood Charter School:	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: Hobgood Charter School

Location of School: Halifax County

CMO/EMO: N/A

Subgrant Type: Implementation Only

Projected Enrollment:

Subgrant Year	Grade Levels Served	Total Student Enrollment	Total ED Student Enrollment	ED Enrollment Percentage
2020-2021	K-8	250	173	69%
2021-2022	K-8	275	193	70%
2022-2023	K-8	300	213	71%
2023-2024	K-8	325	234	72%
2024-2025	K-8	350	256	73%

Requested Funding Amount: \$800,000

Recommended Funding Amount: \$500,000⁶

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 checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section II – Assurances	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete
Section VII – 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 (A, B, and C)	70	62
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	28
Section V – Competitive Preference Standards	Up to 12	6
Total (must receive at least <i>80 points</i> to pass)	100	96

Priority Standards	Standards Possible	Standards Met
Section VI – Priority Consideration Status	4	2

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 checked="" type="checkbox"/> Pass with Priority
	<input 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 Hobgood Charter School be approved based on the following evaluation:

Strengths

The applicant is committed to serving a more diverse and disadvantaged student population, one that more accurately reflects the diversity of the surrounding communities. Though the applicant currently serves a significant number of educationally disadvantaged students, the school is committed to seeing year-over-year increases in this population. Also, currently, non-white students represent approximately 25% of the school's student population, while, per statistics from the Census Bureau, racial/ethnic minorities make up approximately 60% of the population in Halifax County. As evidenced by these statistics, the school is not currently in alignment with the demographics of the surrounding communities, but through a targeted marketing and recruitment strategy and the expansion of student and family support services, the applicant will strive to see a greater number of racially/ethnically diverse families expressing interest and submitting applications for attendance. The school's weighted lottery provides additional weight based on economic status; and the board and administrative team will regularly monitor the applicant pool and student enrollment data to determine progress toward their goal.

The applicant is also planning to use subgrant funds to further tailor its academic program to meet the needs of educationally disadvantaged students through a partnership with FirstSchool, an affiliated program of the UNC-Chapel Hill Frank Porter Graham Child Development Institute. The program is focused on helping schools and districts improve the educational experience of diverse and disadvantaged students. This partnership will provide on-site professional development, coaching and consultation that will build staff capacity and contribute to the development of strategies and processes the school can use beyond the project.

The applicant plans to offer summer programming to minimize "summer slide" for students and to provide continued academic stimulation; students will have the opportunity to participate free of cost. Transportation services will be provided to ensure all students have equitable opportunities to participate.

Given the need and rural nature of the county, the applicant currently provides transportation via two buses which operate routes to cluster stop locations. The applicant plans to use NC ACCESS subgrant funds to expand its transportation program by purchasing an additional five buses over the project period. These additional buses will allow for more cluster stops and, when possible, home-based stops.

Weaknesses

The applicant does not provide baseline or projected decrease in the number of in-school, short term suspensions which is one of the project goals presented, therefore the goal does not meet the SMART criteria.

The applicant does not describe the budgetary and decision-making autonomy of the board or directors and no partner agreements are attached.

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 13, 2020

VIA EMAIL

Juliana Harris, Principal
Hobgood Charter School
201 S. Beech Street
Hobgood, NC 27843
jharris@hobgoodcharterschool.org

Dear Ms. Harris,

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, Hobgood Charter School 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 Hobgood Charter School's designation as eligible, Hobgood Charter School 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".

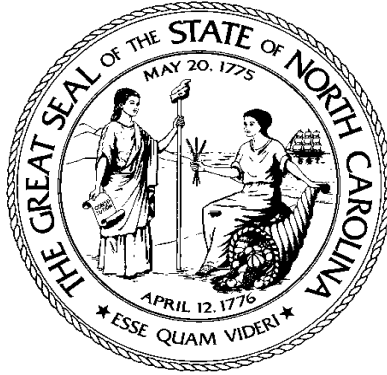
Dave Machado, Director
Office of Charter Schools

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



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

Due by 5:00 pm (EST), March 1, 2020

North Carolina Department of Public Instruction
Office of Charter Schools
301 N. Wilmington Street
Raleigh NC 27601-2825
919-807-3491

Mailing Address:
6307 Mail Service Center
Raleigh, NC 27699-6307

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

A. Enrollment Projections (10 points)

Subgrant Year	Grade Levels Served	Total Student Enrollment	Number of ED* Students	Percentage of ED* Student Population
2020-2021	K-8	250	173	69%
2021-2022	K-8	275	193	70%
2022-2023	K-8	300	213	71%
2023-2024	K-8	325	234	72%
2024-2025	K-8	350	256	73%

*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)

Hobgood Charter School’s (HCS) projected total student population is based on the planned year-over-year growth outlined in the attached charter application (*Appendix E-1; p. 9*). The baseline (project year one) for educationally disadvantaged (ED) students is based on the school’s current economically disadvantaged student population (66.96% without the county-based multiplier) (*Appendix D-1*), plus an additional 2% to account for students that may qualify as educationally disadvantaged but not as economically disadvantaged (i.e. a student with a disability that does not also qualify as economically disadvantaged).

Table 1: % of Economically Disadvantaged Students in Halifax County Schools (Elementary and Middle Schools)

School	%
William R. Davie Middle STEM Academy	61.5
Scotland Neck Elementary Leadership Academy	76.6
Pittman Elementary Leadership Academy	68.8
Inborden Elementary Leadership Academy	73.5
Hollister Elementary Leadership Academy	59.4
Everetts Elementary STEAM Academy	71.2
Enfield Middle STEAM Academy	72
Aurelian Springs Institute of Global Leaders	69.5

Source: 2018-19 NC School Report Cards

As illustrated in *Table 1* above, HCS’ projected ED student enrollment numbers are feasible when compared to the economically disadvantaged student populations in elementary and middle schools in the LEA. They are also realistic in light of the school’s marketing and recruitment plan (*section C.3*) and HCS’ commitment to provide students and families with expanded support services. They are ambitious as the five-year projection will mean that HCS will eventually serve an economically disadvantaged student population that exceeds most of the elementary and middle schools in the LEA, per the 2018-19 NC School Report Cards. Also, over the next five years, HCS’ projects an ambitious 48% increase in its ED student population. This proposed growth, though attainable, will require HCS to effectively steward subgrant funds to support the successful implementation of the school’s proposed strategies.

HCS will strive to meet and exceed these projections, but, most importantly, the school expects that this subgrant, and all of the activities described within this proposal, will

contribute to the development of strategies and support structures that will enable the school to continue to diversify its student population well beyond the formal grant period.

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

HCS is committed to serving all students in Halifax County and the surrounding communities. As outlined in the charter application, HCS has an approved weighted lottery that states the school will use *“the federal free lunch guidelines to determine student's eligibility for the weighted lottery. We will set aside 50% of authorized open seats for students eligible for free lunch. We will utilize an application process that provides demographic and income information on a separate sheet. Any open seats not filled in the lottery for students in poverty will be made available to all students”* (Appendix E-1; p. 50). To promote process transparency, a dedicated link is featured on the school’s enrollment page to provide families with a detailed explanation of the weighted lottery process and eligibility requirements for those seeking this enrollment preference.¹ HCS will continue to share information about the weighted lottery at school information events and in new marketing materials.

Additional information on the school’s weighted lottery can be found on the school’s website and in the attached charter application (Appendix E-1).

¹www.hobgoodcharterschool.org/apply-to-enroll

B. Education Plan (30 points)

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)

HCS strives to accommodate and meet the needs of all students, regardless of demographic or educational disadvantage. Specifically, *“as stated in our admissions policy, we will not discriminate against any student or limit admission based on intellectual ability, measures of achievement or aptitude, athletic ability, race, religion, national or ethnic origin, color, age, military service, disability, or gender, except where exemption is appropriate and allowed by law”* (Appendix E-1; p. 46). To-date, HCS has implemented the following strategies to address barriers to enrollment:

- Implemented a weighted lottery that gives enrollment preference to economically disadvantaged students
- Offered transportation/bus service (section C.4)
- Provided a free lunch for qualifying families
- Accommodated students with physical disabilities
- Employed a full-time EC Specialist

With support of NC ACCESS subgrant funds, the school will:

- Expand the current transportation program with additional buses, thus allowing for more stops (section C.4)
- Build staff capacity to serve a more diverse and disadvantaged student population via an expanded professional development program (section C.6)
- In collaboration with an outreach consultant, improve the effectiveness and reach of the school’s marketing and recruitment strategy. This is especially important as HCS faces a unique challenge given its status as a private school conversion. Since many in the community were familiar with HCS when it operated as a private school, the school

is now tasked with explaining what the transition means in terms of increased accessibility and the enrollment process (*section C.3*)

As outlined above, HCS has instituted both operational and academic support structures to accommodate the needs of a diverse and disadvantaged student population, and, with the support of subgrant funds, the school will further expand its professional development program, support services and marketing and recruitment efforts.

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)

With the support of NC ACCESS subgrant funds, HCS will pursue the following project goals. These goals are aligned with and support the goals of the NC ACCESS Program and the Department of Education's Charter Schools Program (CSP).

- **In each project year, due to the expansion of student services and a targeted marketing strategy, HCS will report the following:**
 - **By September 2023, HCS will report a 10% increase in the number of racially/ethnically diverse families that apply for enrollment as determined by representation in the applicant pool.**
 - **By September 2023, HCS will serve at least a 73% educationally disadvantaged student population.**

Details: HCS is committed to serving a more diverse and disadvantaged student population, one that more accurately reflects the diversity of the surrounding communities. Though the school currently serves a significant number of educationally disadvantaged students, HCS is committed to seeing year-over-year increases in this population. Also, currently, non-white students represent approximately 25% of the school's student population, while, per statistics from the Census Bureau, racial/ethnic minorities make up approximately 60% of the population in Halifax County. As evidenced by these statistics, the school is not currently in alignment with the demographics of the surrounding communities, but through a targeted marketing and recruitment strategy and the expansion of student and family support services, HCS will strive to see a greater number of racially/ethnically diverse families expressing interest and submitting applications for attendance. The school's weighted lottery provides additional weight based on economic status; however, pursuant to §115C-218.45, HCS is also committed to "...making efforts for the population of the school to reasonably reflect the racial and ethnic composition of the general population residing within the local school administrative unit in which the school is located." The HCS Board and administrative team will regularly monitor the applicant pool and student enrollment data to determine progress toward this goal.

- **In June of each project year, Hobgood Charter School will report a year-over-year decrease in the number of short-term and in-school suspensions, especially among students with disabilities and economically disadvantaged students.**

Details: HCS recognizes that missed instructional time is disruptive to students' academic growth, especially for economically disadvantaged students and students with disabilities. To address this issue, HCS is committed to cultivating an engaging and relationship-driven learning environment that utilizes the Conscious Discipline framework (*section B.5*). In utilizing this approach, the school is confident that it will see consistent decreases in the

number of students receiving short-term and in-school suspensions. If no such progress is made in this area, the HCS Board and administrative team will evaluate school-wide behavioral trends and develop appropriate modifications to the school's academic program, school climate/discipline approach and/or staff professional development plan.

- **In response to surveys administered to staff and current families at the end of the school year in each project year, HCS will report a 5% year-over-year increase in the number of:**
 - **Staff that indicate that they have the resources and training they need to serve all students, regardless of any potential educational disadvantages.**
 - **HCS families that indicate that they feel supported by the school and that the school's support services are sufficient for meeting the needs of all students.**

Details: As described in detail in *section C.6*, HCS will use subgrant funds to expand its existing professional development program. The school is committed to providing staff with the training and resources they need to serve a more diverse and disadvantaged student population. This annual survey will ultimately evaluate the efficacy of the school's current and expanded professional development program. Recognizing that perception is often reality, HCS is also committed to evaluating the extent to which families feel supported by the school, as stakeholder perception will have an impact the school's ability to recruit prospective families. If HCS falls short of the prescribed goal, the HCS board and administrative team will consider changes to the school's professional development program and/or support services.

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)

To reiterate, HCS is committed to serving a diverse student population and meeting the needs of educationally disadvantaged students, including those from economically disadvantaged circumstances. As described in the the school's charter application, "*with a target group focus on children from economically disadvantaged homes, HCS will work to combat documented long-term effects of poverty such as obesity and heart disease through a strong emphasis on physical well-being. By providing continuous education in grades K-8 on the importance of physical exercise, healthy food choices, and healthy lifestyles, all students from HCS will graduate with a knowledge of how to maintain a healthy body, positively impacting the physical effects of poverty on students' lives*" (*Appendix E-1*; p. 18). Therefore, this emphasis on health and wellness is an integrated aspect of the school's academic program and is specifically designed to address issues that may disproportionately affect students living in poverty.

Further, as described in the school's charter application, "*according to the National Center for Children in Poverty, poverty can contribute to social and emotional difficulties often resulting in displays of aggression, hyperactivity, and conduct problems in school. Research indicates that schools who implemented Conscious Discipline, the choice curriculum for social-emotional learning at HCS, reported a decrease in discipline referrals related to behaviors such as hyperactivity and aggression*" while also seeing "*increased academic achievement, improved school culture, and healthier social and emotional skill sets for students leading to more positive school experiences*" (*Appendix E-1*; p 18). HCS believes that its decision to use the Conscious Discipline Framework will help students, particularly those

that may need extra social and emotional support, have a better and more successful educational experience.

Given its location in an isolated, low-resource area, a significant number of students have rarely traveled beyond the region and, in some cases, the county line. This lack of experience beyond the community may significantly limit a student's ability to apply knowledge within a global context. To address this, HCS strives to integrate meaningful and applied learning opportunities into its academic programs, primarily through the use of *"inquiry-based learning opportunities such as project-based learning which has been shown to improve the attendance of economically disadvantaged students as compared to traditional teaching styles"* (Appendix E-1; p. 15). In an effort to promote applied and globally-connected learning, HCS will use subgrant funds to incorporate virtual and augmented reality learning opportunities into classroom instruction through the purchase and use of Google Expedition kits (see *budget* and *budget narrative*). Leveraging subgrant funds for this particular instructional technology ensures that students' understanding of the world and world events is not determined or hindered by their location or economic status. HCS also plans to expand its ability to provide an applied and collaborative educational experience by purchasing new collaboration-oriented classroom furniture, central-use computer lab equipment and classroom-level instructional technologies (i.e. document cameras, projectors, etc.).

HCS is also planning to use subgrant funds to further tailor its academic program to meet the needs of educationally disadvantaged students through a partnership with FirstSchool, an affiliated program of the UNC-Chapel Hill Frank Porter Graham Child Development Institute.² The program is focused on helping schools and districts improve the educational experience of diverse and disadvantaged students. This partnership will provide on-site professional development, coaching and consultation that will build staff capacity and contribute to the development of strategies and processes the school can use beyond the project.

As part of the school's detailed mission statement, the school strives to help students live a *"productive life that is economically stable..."* (Appendix E-1, pg. 10). In support of this mission, HCS will use subgrant funds to expand its academic program to include a focus on entrepreneurship, which is an important and relevant topic in a rural, economically disadvantaged area. It is suggested that students who live in economically challenged areas may be more likely to engage with and find relevancy in an entrepreneurship-focused environment.³ To support the integration of this academic focus, HCS will use subgrant funds to sponsor staff attendance (three per year) at an annual entrepreneurship certification conference hosted by REAL Entrepreneurship, a subsidiary program of the Sequoyah Fund.⁴ REAL Entrepreneurship offers a specific K-8 entrepreneurship focus as part of their suite of certifications. Upon completion of this training, participants will guide the HCS administration and staff on ways to integrate entrepreneurship-focused learning opportunities into the school's academic program. By supporting this certification opportunity for staff, HCS will build staff capacity to help students develop an entrepreneurial mindset. This mindset will provide students with a lens through which they can approach and more effectively engage in other aspects of the school's academic program (i.e. project-based learning). Long-term, HCS hopes the inclusion of this academic focus will empower students to positively shape the economic activities in the area and contribute to students' ability to live economically stable lives.

²www.firstschool.fpg.unc.edu/

³Rosen, A. (2014, November 5). Why We Should Teach Entrepreneurship to Disadvantaged Students. Retrieved February 11, 2020, from <https://hbr.org/2014/09/why-we-should-teach-entrepreneurship-to-disadvantaged-students>

⁴www.realentrepreneurship.org

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

As described in HCS' charter application, *"the educational plan at Hobgood Charter School is founded on instruction that is focused on a whole child, constructivist approach to teaching and learning based on the premise that learning occurs as students are actively involved in a process of meaning and knowledge construction as opposed to passively receiving information. The instructional vision for HCS is that as visitors walk through the school, students are engaged with meaningful literacy experiences across the curriculum, working collaboratively with other students and teachers where metacognition or 'thinking about one's own thinking' is the driving force in problem solving, and 21st century skills are being developed in every lesson, activity, and project. HCS will focus on building its students with the stamina, curiosity, and ambition it takes to solve real-world problems that can ultimately be transferred to improving their communities and lives.*

The curricula are philosophically aligned to promote ongoing interactions, develop active listening skills, and be prepared to respond to feedback and challenges in positively responsive ways. Reading and writing will be approached in a paralleled workshop format utilizing Lucy Calkins' Units of Study where students will learn to critically analyze literature for meaning while also having opportunities to create their own pieces of literature based on the information they have learned during the workshop. This approach is fluid in nature, allows learning to be personalized through constant conferring with teachers, and provides students the opportunity to view reading and writing as opportunities as opposed to requirements.

The math curricula selected, Investigations 3 and Open Up Resources 6-8 Math, which recently received the highest-ever rating from EdReports, poses mathematics in a real-world sense where math is seen as a practical tool for navigating the world. In far too many schools, core curriculum is presented in ways that are impersonal and unconquerable for students who do not come from homes where opportunities abound. It is our goal to change that perception for students where they develop a strong desire to learn more and to crave opportunities that challenge their minds" (Appendix E-1; p. 11).

In addition to the defining characteristics mentioned above, another differentiating aspect of the school is its use of the Conscious Discipline Framework. Described in more detail in *section C.5*, the framework guides students in their ability to regulate their emotions and responses to conflict. This focus is critical to students' success as it has been shown to reduce the likelihood of suspensions and out-of-class time due to behavioral issues, thus allowing students to stay engaged in their learning.

Though HCS realizes that its focus on project-based learning (PBL) may not be unique to the school, it is a critical part of the school's education plan. With support from subgrant funds, HCS is planning to further expand this aspect of the school's educational approach by supporting staff participation in a PBL fellowship program offered by the NC Museum of Natural Science (*section C.6*), assuming staff are selected through the fellowship program's application process.⁵

As noted in *Table 1* in *section A.1*, all of the elementary and middle schools in Halifax County Schools have a specific focus in their academic program (i.e., Leadership, STEM and STEAM). With the support of subgrant funds and as described in *section B.4*, HCS is planning

to incorporate a focus on entrepreneurship into its curriculum, which will serve as a distinguishing aspect of the school's education plan when compared to the LEA. This new curricular focus, supported by staff professional development (*section C.6*) and curriculum resources (*budget and budget narrative*), is especially important and relevant in a community and region that is facing low-resource, economically challenging circumstances.

More detailed information on the school's education plan can be found in the attached charter application (*Appendix E-1*).

⁵www.pblfellows.naturalsciences.org/

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

Overall, per the school's charter application, HCS strives to *"create an environmental climate that encourages physical activity, healthy nutrition, and positive interpersonal relationships"* (*Appendix E-1*; p. 13). HCS also offers *"parent seminars on subjects like nutrition, health and wellness, parenting, academic strategies at home, and gardening for which transportation can be provided from our cluster stops as well as hosting opportunities in the communities in which the families live"* (*Appendix E-1*; p. 48). In addition to providing resources and insights for parents, these seminars provide a mechanism through which the school can build positive relationships with the broader school community.

As mentioned in other sections, HCS utilizes the Conscious Discipline framework. As described in the school's charter application, *"discipline will be proactively addressed through the Conscious Discipline framework which is a "multidisciplinary approach based on three distinct brain-body states in adults and children that drive behavior" including survival, emotional, and executive states. The framework addresses students social-emotional well-being and provides a common language for all students and staff. HCS will use Conscious Discipline to teach students how to self-regulate and handle conflict which will lead to more effective problem solving in social situations and decreased discipline referrals. Conflict will be viewed as an opportunity to teach appropriate behavior. Morning Meeting will be the designated time for explicit social skills instruction each day. Should a student display continuous difficulties with behavior, the teacher should enlist the support of the guidance counselor, MTSS team, and family to create a specific behavior plan for the student to provide specific attainable goals for the student and to provide a means for monitoring and tracking the students behavior. If deemed necessary, a functional behavior assessment can be conducted"* (*Appendix E-1*; p. 29).

HCS also utilizes a Multi-Tiered System of Supports (MTSS), which enables the school to efficiently identify and provide targeted support for students who are at risk of poor academic performance. If a student is struggling with a behavioral and/or academic issue that warrants additional support, the situation will be forwarded to the school's MTSS team, which is *"comprised of the school administrator, one teacher from each gradespan K-2, 3-5, and 6-8, the guidance counselor, special education teacher, the student's parent(s), and the reading specialist as necessary"* (*Appendix E-1*; p. 21). Implementation of this framework reflects HCS' commitment to meet the needs of its students and families, and it contributes to a positive and supportive school climate.

If awarded a subgrant, HCS will use funds to further support the school's focus on interpersonal relationships through a partnership with Learning for Living, an organization that provides professional development support to schools and districts that are working to build a strong, relationship-driven school culture (*Appendix E-8*). HCS will use subgrant funds to host

two on-site professional development opportunities for staff in project years one and two. Recognizing the importance of a strong school culture in all educational contexts, HCS will reserve space and invite representatives from the surrounding LEAs and charter schools to participate in these trainings. In addition to leveraging subgrant funds to benefit both HCS and non-HCS students, HCS is hopeful that LEA and charter school attendance at these trainings will initiate conversations and the sharing of best practices that will encourage collaboration well beyond the project period.

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

Per the school’s charter application, *“Hobgood Charter School will follow a traditional calendar model broken into 6-weeks grading periods. According to G.S. 115C-84.2, the school calendar must provide instruction for a minimum of 1,025 hours. The school day will begin at 8:00am and will release at 3:00pm with instructional time accounting for 5.75 hours per day. The school will closely follow the traditional school calendar for surrounding counties”* (Appendix E-1; p. 21).

HCS is aware of the learning loss that may occur as part of an extended summer break. As stated in the school’s charter application, HCS plans to offer summer programming as *“research indicates that students who come from economically disadvantaged homes often do not receive the same level of stimulation during breaks as those from more affluent homes. In order to minimize “summer slide” for students and to provide continued academic stimulation, students will have the opportunity to participate free of cost. Summer camp experiences will include opportunities such as Farm to Table Gardening, Cooking 101, Storybook Dragons, and Summertime STEAM, which will be facilitated by contracted instructional staff. Transportation services will be provided to ensure all students have equitable opportunities to participate”* (Appendix E-1; p. 21). In light of the school’s added focus on entrepreneurship, HCS will also offer students an entrepreneurship-themed summer camp experience.

As demonstrated in the school’s 2019-20 calendar (Appendix E-9), HCS reserves time in its calendar for professional development and staff collaboration. Specifically, the school has two early release days, six optional workdays and nine mandatory workdays, with most of the workdays allocated for professional development prior to school. As described in *section C.6*, HCS’ calendar will allow staff to participate in summer professional development opportunities, including the REAL Entrepreneurship certification training.

Though HCS doesn’t utilize a particularly innovative calendar, the school is committed to helping any student that may need academic support and learning opportunities during breaks. This commitment ensures that the school’s calendar is not a barrier to enrollment or detrimental to students’ academic growth. Further, HCS will continually evaluate its calendar to determine its impact on educationally disadvantaged students and families.

More information on the school’s calendar can be found in the attached charter application (Appendix E-1; p. 21) and Appendix E-9.

C. Operations Plan (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. (2 points)

Admittedly, in light of the school's location in an extremely rural and low-resource area, there is a dearth of community organizations, thus making it difficult to develop formal partnerships with local organizations. The school's most formal partnership is with Harrison YMCA, which is located in Rocky Mount (approximately 30 minutes away) and supports the school's afterschool program. The school also has an ongoing partnership with Action for Healthy Kids, which provides on-site professional development and consultation on the school's health and wellness focus. HCS will continue to explore potential partnerships opportunities with other organizations that may serve and provide outreach to a diverse and disadvantaged audience (i.e. 4-H, Boys and Girls Club of Halifax County, local churches, etc.). In researching potential partnerships, HCS desires to build partnerships that will allow the school to expand the reach of its marketing efforts and improve its ability to serve a diverse audience.

HCS will leverage professional development opportunities to network with potential statewide partners. As described in *section C.6*, HCS will use subgrant funds to support the school leader's participation in the NC Education Policy Fellowship Program (NC EPFP), assuming acceptance through the program's application process. This program, which is part of the Institute for Educational Leadership and is administered in the state by the NC Public School Forum, provides an opportunity for education leaders to network and explore policy-related topics. The year-long fellowship program also allows representatives from a variety of education organizations to share best practices, thus providing a channel through which HCS can learn and broadly share best practices in serving educationally disadvantaged students.

Also, HCS will use subgrant funds to support six staff members' participation in the Project-Based Learning (PBL) Fellowship through the NC Museum of Natural Science (*section C.6*). If accepted into the program, participants will gain access to PBL outdoor-based experiences, which aligns with the schools outdoor-learning focus as described in the school's charter application (*Appendix E-1*). Moreover, this experience will allow participants to network with staff at the museum and educators from different schools. This will enable staff to pursue partnerships beyond the local community, as well as build staff capacity to facilitate outdoor-focused PBL experiences.

As detailed in *section C.6*, HCS will partner with professional development providers, specifically FirstSchool and Learning for Living, as a way of building staff capacity to serve a more diverse and disadvantaged student population.

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)

Though still in its first year of operation as a charter school, HCS has pursued a staffing structure that will meet the needs of all students. In addition to a lead administrator and classrooms teachers, HCS employs a full time EC teacher and teacher assistants to provide one-on-one assistance. Beyond the school's current capacity, HCS is committed to continually assessing its staffing structure to meet the needs of students. The HCS Board regularly assesses academic trends and changes in student population to evaluate the need for additional staff, and, if deemed necessary, the HCS Board is willing to prioritize this line item in the school's operating budget.

Related to capacity, HCS currently coordinates a number of on-site professional development sessions that address a variety of topics, with most sessions offering targeted strategies that work in support of the school's mission and goals (*section C.6*). With support from NC ACCESS subgrant funds, HCS plans to significantly expand the school's existing professional development program to include targeted and content-specific professional

development opportunities. This expanded professional development strategy will cover a range of topics, including project-based learning, school culture, entrepreneurship and improving the educational experience for a diverse and disadvantaged student population.

HCS believes the school's current staffing structure, the HCS Board's commitment to regularly reviewing staffing needs and the school's current and proposed staff development program, is sufficient to meet the needs of all students, regardless of background, demographic or disadvantage.

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)

As described in the school's charter application, HCS "*school personnel, board members, and parents have held informational meetings in various public and private locations throughout our communities to share our mission and plans for converting to a Public Charter School*" (*Appendix E-1*; pp. 46-47). Also, since receiving SBE approval to operate as a charter school, HCS has updated all of its online and printed marketing materials, including the school's website.

With the use of subgrant funds, HCS will pursue the following process improvement model for expanding its marketing and recruitment efforts: 1.) Identify; 2.) Plan; 3.) Implement; 4.) Evaluate; and 5.) Adjust

As part of the *identify* phase, HCS will embark on a data survey of the school and broader community. As it relates to the school community, this survey will seek to accurately capture the school's diversity in terms of educational disadvantages and racial/ethnic diversity. As HCS conducts this survey, the school will use the best practices outlined in the *Intentionally Diverse Charter Schools: A Toolkit for Charter School Leaders* resource guide (*Appendix E-2*). HCS will also conduct a more in-depth survey of the surrounding communities to determine the demographics of specific areas and neighborhoods and research potential partnerships as a way of developing and coordinating more targeted marketing and recruitment efforts.

Once HCS has conducted a data survey of the school and broader community, the school will, in conjunction with an outreach consultant (see *budget, budget narrative & Appendix E-3*), *plan* expanded marketing and recruitment efforts that leverage many of the strategies discussed in the *Toolkit*. Pursuing a process improvement method ensures that the school's marketing and recruitment plan is intentional, data-driven and designed to reach a broader, more diverse audience, including those who may speak English as a second language. This plan will include efforts to provide community-based, in-person school information events and direct enrollment support. HCS will use direct mailings and provide current HCS families with marketing materials to share within their realms of influence as word-of-mouth has proven to be an extremely effective form of marketing. HCS will also consistently evaluate its application process and associated materials to ensure that the school is conducting an easily understood and transparent enrollment process.

As part of the *implementation* stage, the school, with the assistance of the outreach consultant, will implement the school's marketing and recruitment plan, including the specific strategies outlined above. The outreach consultant will be responsible for regularly meeting with the administrative team to coordinate and facilitate marketing and outreach events (*Appendix E-3*). The outreach consultant, HCS Board and administrative team will consistently *evaluate* the efficacy of the school's marketing and recruitment plan in reaching a broader, more diverse audience. Effectiveness will be determined based on attendance at

outreach events, changes in the level of communication with prospective families and, ultimately, changes in the applicant pool (see *Goal 1*), with the latter being monitored carefully during the enrollment period. HCS will use data collected during this ongoing assessment formatively to address any potential deficiencies and make adjustments to the school’s marketing and recruitment plan, both in the short and long term.

HCS also recognizes the importance of evaluating the degree to which the school environment is welcoming and inclusive of diverse and disadvantaged families. To this end, HCS will host biannual “Perception and Reception” walkthroughs conducted by the school’s parent/community advisory council (*section C.7*). These walkthroughs will ask advisory council members to observe all aspects of the school (i.e. facilities, classroom layout, instruction, interactions, etc.) and make note of those aspects that may deter families from diverse and disadvantaged circumstances from seeking enrollment in the school. Once potential issues are found, the parent/community advisory council will develop and share specific and targeted recommendations with both the school’s board and administrative team. In order an effort to increase collaboration with traditional public schools and receive critical feedback, HCS will also invite representatives from the surrounding LEAs to participate in these walkthroughs. This will subject HCS’ school environment to the critical review of external reviewers and provide a channel through which HCS and LEAs can learn and share best practices in serving diverse and disadvantaged student populations.

Utilizing the process improvement model outlined above ensures that the school is strategically addressing any potential remaining barriers to enrollment, effectively marketing its academic programs and reaching a broader, more diverse audience.

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

As described in the school’s charter application, HCS utilizes a multifaceted approach to transportation to ensure that transportation is not a barrier to enrollment (*Appendix E-1; p. 52*). HCS prioritizes the efficiency and efficacy of the school’s transportation plan as part of the school’s operational goal, as provided in the attached charter application (*Appendix E-1; p. 13*). Though the school doesn’t manage it, HCS currently encourages carpooling and is willing to assist families in researching solutions to their transportation limitations if they are interested in carpooling.

Given the need and rural nature of the county, HCS currently provides transportation via two buses which operate routes to cluster stop locations. HCS plans to use NC ACCESS subgrant funds to expand its transportation program by purchasing an additional five buses over the project period (see *budget* and *budget narrative*). These additional buses will allow for more cluster stops and, when possible, home-based stops. HCS will continue to advertise and market this expanded support service in new marketing materials and at school information events.

HCS is committed to providing transportation assistance to “...students with IEPs that reference transportation and homeless students...” (*Appendix E-1; p. 52*). In the event a family’s transportation needs cannot be met through the carpool or bus options, HCS will work with that family on an individualized basis to develop a solution.

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)

Hobgood Charter School does not participate in the National School Lunch Program. However, as stated in charter application, HCS provides free lunches for “...students who meet federal guidelines for free lunches...” via a contracted food service, which is supported by an allocation of funds in the school’s operating budget (*Appendix E-1; p. 52*). As part of the school’s expanded marketing and recruitment plan (*section C.3*), HCS will increase awareness of this support service by featuring it in all new marketing materials and as part of school information events.

More information on the school’s lunch plan can be found in the attached charter application (*Appendix E-1; p.52*).

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

HCS is committed to building staff capacity via a comprehensive professional development program. Specifically, as noted in the school’s charter application, “*the following are professional development endeavors that build the fundamental framework for instructional staff at HCS:*

- *Lucy Calkins Workshop Model for reading and writing*
- *Inquiry-based learning with a focus on project-based learning*
- *Formative assessment strategies*
- *Guided Reading*
- *Ruby Payne’s Framework for Understanding Poverty*
- *Cultural Competence for Educators*
- *K-8 Energizers*
- *Guiding Principles of Action for Healthy Kids*
- *Conscious Discipline” (Appendix E-1; p. 18).*

Despite boasting an already expansive professional development program, HCS, with support from NC ACCESS subgrant funds, will pursue additional whole group and individualized professional development opportunities. First, in accordance with the NC ACCESS Program’s requirements, the school’s lead administrator and another school representative will complete the NC ACCESS Fellowship Program. While completing this program, HCS representatives will seek out opportunities to collaborate and share best practices with other charter schools.

In addition to the NC ACCESS Fellowship Program, HCS plans to incorporate two other fellowship experiences into its professional development program. These additional fellowship programs offer opportunities to gain new insights and network with other education practitioners and leaders, with the latter being critically important for schools located in rural, isolated communities. In the second project year, HCS’ school leader will apply to participate in the NC Education Policy Fellowship Program (EPFP), a program that is facilitated nationally by the Institute for Educational Leadership (IEL) and administered locally by the NC Public School Forum (*Appendix E-4*). This program provides participants, which include education leaders from across the state, an opportunity to network and consider the development, implementation and implications of policy decisions. Further, as part of the fellowship experience, participants attend a national convening in Washington D.C. of Education Policy Fellows from across the country. Selection in this program is competitive, so participation is contingent upon acceptance.

HCS will also use subgrant funds to sponsor two teachers in each project year to participate in the Project-Based Learning (PBL) Fellowship offered through the NC Museum

of Natural Science. Similar to the Education Policy Fellowship Program, participation is contingent upon selection. This program offers participants an opportunity to explore and translate a natural science topic into a thematic PBL unit. This individualized professional development experience will ultimately support the school's desire to "*utilize inquiry-based learning opportunities such as project-based learning*" and "*extend learning beyond the walls of the classroom through outdoor learning*" (*Appendix E-1; p. 15*). In line with the education policy fellowship, this experience will give HCS participants an opportunity to expand their community of practice and network with other educators across the state, which may provide additional insights into how PBL learning experiences can be differentiated for educationally disadvantaged students.

In addition to these fellowship experiences, HCS will also use subgrant funds to sponsor three staff members in each project year to earn a K-8 entrepreneurship certification. This certification is offered by REAL Entrepreneurship as part of their annual summer certification training. REAL Entrepreneurship is a program focused on helping community members, specifically those in rural areas, identify and develop entrepreneurial potential and talent. HCS will invest in this professional development opportunity to support a new entrepreneurship focus in the school's academic program (*section B.4*). This additional focus will help students develop an entrepreneurial mindset, which will, hopefully, impact the way they engage in the school's broader academic program. More broadly, HCS hopes this new and defining aspect of the school will empower students to consider ways that they may be able to eventually contribute to and improve the local economy and their own economic circumstances.

HCS will also partner with FirstSchool, a program affiliated with the UNC-Chapel Hill Frank Porter Graham Child Development Institute. FirstSchool will provide onsite professional development, coaching and consultation on strategies and best practices for serving diverse and disadvantaged students. Related, HCS will also use subgrant funds to purchase a site license for EduSnap, an evaluation tool that will provide time-measured observations of classroom attributes, including activities, content and teaching and learning approaches. HCS will contract with external EduSnap evaluators, coordinated by FirstSchool, to conduct the evaluations. Data collected during these observations will 1.) inform the school's professional development program and 2.) provide teachers with formative data they can use to modify their classroom instruction, thus allowing them to improve their professional practice.

To help support the school's efforts to become a relationship-driven and inclusive school, HCS will use subgrant funds to partner with Learning for Living. Learning for Living provides a road map for building a school culture that supports all students. The organization will provide on-site professional development in project years one and two. This professional development focus will help the school build a strong relationship-driven and collaborative school culture that will help all students, regardless of their disadvantages, feel connected to the school environment.

Finally, HCS has allocated funds to support staff attendance at off-site conferences and training events, including the NC DPI EC conference, OCS Leadership Institute, NCDPI Connection Communities of Education Stakeholders Conference, among others (see *budget* and *budget narrative*). Staff will be asked to submit requests and, once approved, all travel-related expenses will be processed within applicable per diem rates.

Combined with the school's existing professional development program, the proposed professional development opportunities will ensure that staff have the resources, insights and networks they need to meet the needs of all students.

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

HCS already has a parent/community advisory council structure in place. As described in the school’s charter application, *“the Board of Directors, in support of our mission, will establish a School Improvement Team composed of community leaders, teachers, and parents. The purpose of this team is to provide the Board and Lead Administrator ideas and insight that will help Hobgood Charter School meet its goals and prepare for the future. They will help to provide a diverse frame of reference and work to enhance community outreach. This team will be appointed cooperatively by the Board and Lead Administrator. The team has no direct authority and reports directly to the Board”* (Appendix E-1; p. 35).

In many ways, the existing School Improvement Team is carrying out the function of a parent/community advisory council. Therefore, if awarded a subgrant, the current School Improvement Team will be transitioned to meet the NC ACCESS Program’s advisory council requirements related to attendance, membership and frequency of meetings. HCS will strive to recruit members that reflect the diversity of the surrounding community. The advisory council will provide guidance to the HCS Board and administrative team via meeting minutes and, in accordance with NC ACCESS Program requirements, will share those minutes with the Office of Charter Schools. Leveraging an existing structure ensures a level of consistency in the way the school gathers and utilizes feedback from a variety of stakeholders, plus the use of an existing structure contributes to the sustainability of the council beyond the project period.

As described in *section C.3*, HCS’ parent/community advisory council will also participate in biannual “Perception and Reception” walkthroughs as a way of providing insights and recommendations for making the school environment more welcoming and inclusive. Additionally, advisory council representatives, along with HCS Board members, will be encouraged to participate in the school’s professional development program, especially the trainings provided by FirstSchool and Learning for Living. As provided in the *budget* and *budget narrative*, the school anticipates buying enough FirstSchool books for staff, advisory council representatives and board members. Inclusion of all these parties in professional development opportunities ensures a shared understanding and buy-in as the school strives to serve a more diverse and disadvantaged student population.

D. Student Transition Planning

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

As reiterated throughout this proposal, Hobgood Charter is committed to effectively serving all students, which includes helping students and families smoothly transition out of the school in the event the school is ever faced with the possibility of closure. HCS will develop a Student Transition Committee (STC) in compliance with the subgrant program’s requirements that membership will include an *“...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”* (NC ACCESS Program Guidance Document).

Once established, this committee will develop a comprehensive and time-bound Student Transition Plan. HCS’ plan will largely reflect the best practices, timeline and checklist outlined in the *Colorado Charter School Sample Closure Framework* (Appendix E-5), which also provides guidance on the maintenance and transfer of student records. Developed with

funding from the U.S. Department of Education's Office of Innovation and Improvement, this framework utilizes best practices from a variety of resources and guides on school closure procedures (*Appendix E-5; p. 4*). In utilizing this framework as a guide, HCS is ensuring that the school's Student Transition Plan will be aligned with research-based best practices. The STC will meet at least biannually to consider any potential changes to the school's Student Transition Plan.

The work of the STC and implementation of the Student Transition Plan further demonstrates HCS's commitment to serve all students and families, even in the event the school's viability comes into question.

IV. BUDGET, BUDGET NARRATIVE, AND LOGIC MODEL

A. Budget

NC ACCESS PROGRAM SUBGRANT BUDGET

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

Name of Charter School:
 Authorizer Name:

Select Subgrant Award Type:
 Maximum Award Amount: \$
 Award Amount Requested: \$
 Date:

Name of person completing this report:

Name:
 Phone:
 E-mail:

Name of person to be contacted regarding budget questions:

Name:
 Phone:
 E-mail:

Program Contact: For all application, budget, or other program-related questions contact the NC ACCESS team at:
 (919) 807-3981 or NCACCESS@dpi.nc.gov

Funding Request

Cost Category	Planning Year	Year 1 Implementation	Year 2 Implementation	Year 3 Implementation	Year 4 Implementation	Year 5 Implementation
Instructional Program	\$ -	\$ 220,600.00	\$ 50,000.00	\$ 103,800.00	\$ -	\$ -
Support Program	\$ -	\$ 163,900.00	\$ 165,100.00	\$ 96,600.00	\$ -	\$ -
Total:	N/A	\$ 384,500.00	\$ 215,100.00	\$ 200,400.00	\$ -	\$ -

Revised September 2019

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

Applicant Name: Hobgood Charter School
Subgrant Type: Implementation Only

Budget Category	Planning Year	Year 1 Implementation	Year 2 Implementation	Year 3 Implementation	Year 4 Implementation	Year 5 Implementation*	Total
INSTRUCTIONAL PROGRAM							
Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Employee Provided Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Fees and Contracted Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Supplies and Materials	\$ -	\$ 40,000.00	\$ 50,000.00	\$ 56,000.00	\$ -	\$ -	\$ 146,000.00
Technology and Equipment	\$ -	\$ 180,600.00	\$ -	\$ 47,800.00	\$ -	\$ -	\$ 228,400.00
Travel, Conferences, and Meetings	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Subtotal Instructional Program	\$ -	\$ 220,600.00	\$ 50,000.00	\$ 103,800.00	\$ -	\$ -	\$ 374,400.00
SUPPORT PROGRAM							
Salaries	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Employee Provided Benefits	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Professional Fees and Contracted Services	\$ -	\$ 60,100.00	\$ 58,100.00	\$ 40,600.00	\$ -	\$ -	\$ 158,800.00
Supplies and Materials	\$ -	\$ 2,000.00	\$ -	\$ -	\$ -	\$ -	\$ 2,000.00
Technology and Equipment	\$ -	\$ 23,800.00	\$ -	\$ -	\$ -	\$ -	\$ 23,800.00
Travel, Conferences, and Meetings	\$ -	\$ 3,000.00	\$ 6,000.00	\$ 6,000.00	\$ -	\$ -	\$ 15,000.00
Other	\$ -	\$ 75,000.00	\$ 101,000.00	\$ 50,000.00	\$ -	\$ -	\$ 226,000.00
Subtotal Support Program	\$ -	\$ 163,900.00	\$ 165,100.00	\$ 96,600.00	\$ -	\$ -	\$ 425,600.00
Grand Total	N/A	\$ 384,500.00	\$ 215,100.00	\$ 200,400.00	\$ -	\$ -	\$ 800,000.00

Error Messages (Be sure to clear all errors before submission.)

Year 1 Implementation Budget Detail

Complete the budget detail below for all year 1 implementation expenses.
Contact the NC ACCESS Program team if more than 50 rows are needed.

2	3	4	5	6
Item/Expense	Quantity	Unit Price	Total Cost	Description/Notes
Buses	2	\$ 25,000.00	\$ 50,000.00	2 used buses in good condition.
Postage	1	\$ 5,000.00	\$ 5,000.00	Support the school's direct mail marketing effort. Assumes at least 2,500 direct mailed items.
Classroom Furniture	1	\$ 53,600.00	\$ 53,600.00	Consists of tables, chairs, bookshelves and student/teacher desks. See sample items in appendix E-6.
Front Office/Administration Furniture	1	\$ 22,000.00	\$ 22,000.00	Consists of check in desk, administration desks, chairs and furniture for parent waiting area. See sample items in appendix E-6.
Computer Lab Furniture	1	\$ 30,000.00	\$ 30,000.00	Consists of tables, chairs and technology storage furniture. See sample items in appendix E-6.
Computer Lab Computers	30	\$ 1,100.00	\$ 33,000.00	See sample items in appendix E-6.
Staff Computers	25	\$ 800.00	\$ 20,000.00	See sample item in appendix E-6.
Google Expeditions	8	\$ 4,000.00	\$ 32,000.00	See sample item in appendix E-6.
Classroom-Level Consumables	1	\$ 30,000.00	\$ 30,000.00	Day-to-day classroom supplies utilized in less than one year. See sample items in appendix E-6.
Outreach and Recruitment	1	\$ 20,000.00	\$ 20,000.00	Consists of costs related to designing and printing materials materials.
Training-Related Materials (FirstSchool)	50	\$ 40.00	\$ 2,000.00	Workbooks related to FirstSchool training.
Entrepreneurship Curriculum/Books	1	\$ 10,000.00	\$ 10,000.00	Entrepreneurship-related curriculum/books
NC ACCESS Fellowship Travel	1	\$ 3,000.00	\$ 3,000.00	NC ACCESS Program requirement.
NC REAL Entrepreneurship Certification	3	\$ 3,200.00	\$ 9,600.00	Includes registration (\$2,500), mileage, lodging and meals. Travel will be processed at applicable per diem rates.
Outreach Consultant	1	\$ 15,000.00	\$ 15,000.00	Calculated based on at least 200 hours of support (\$75/hr.).
FirstSchool	1	\$ 16,000.00	\$ 16,000.00	Consists of at least 7 days of on-site coaching and professional development (\$2,000/day, plus travel).
School Culture	1	\$ 5,500.00	\$ 5,500.00	Consists of one day on-site training. See appendix E-8.
EduSnap Site License	1	\$ 1,800.00	\$ 1,800.00	Consists of costs related to a site license for the Edusnap observation program.
EduSnap Data Collectors	12	\$ 200.00	\$ 2,400.00	Contracts with EduSnap data collectors.
Legal Fees	1	\$ 10,000.00	\$ 10,000.00	Consists of costs associated with the development of and adherence to charter contracts, policies or by-laws.
Project-Based Learning (PBL) Fellowship	2	\$ 800.00	\$ 1,600.00	Consists of registration (\$600/each) and travel (\$200/each). Travel will be processed at applicable per diem rates.
Classroom-Level Instructional Technology	1	\$ 12,000.00	\$ 12,000.00	Consists of classroom-level instructional technology items. See sample items in attached list.
			\$ -	
			\$ -	

Year 2 Implementation Budget Detail

Complete the budget detail below for all year 2 implementation expenses.
Contact the NC ACCESS Program team if more than 50 rows are needed.

2	3	4	5	6
Item/Expense	Quantity	Unit Price	Total Cost	Description/Notes
Buses	2	\$ 25,000.00	\$ 50,000.00	2 used buses in good condition.
Postage	1	\$ 5,000.00	\$ 5,000.00	Support the school's direct mail marketing effort. Assumes at least 2,500 direct mailed items.
Audit	1	\$ 7,000.00	\$ 7,000.00	Costs related to conducting the school's annual audit.
Insurance	1	\$ 26,000.00	\$ 26,000.00	Consists of costs related to the school's insurance coverage. Pre-paid for one year.
NC REAL Entrepreneurship Certification Training	3	\$ 3,200.00	\$ 9,600.00	Includes registration (\$2,500), mileage, lodging and meals. Travel will be processed at applicable per diem rates.
Project-Based Learning (PBL) Fellowship	2	\$ 800.00	\$ 1,600.00	Consists of registration (\$600/each) and travel (\$200/each). Travel will be processed at applicable per diem rates.
FirstSchool	1	\$ 12,000.00	\$ 12,000.00	Consists of at least 5 days of on-site coaching and professional development (\$2,000/day, plus travel)
NC Education Policy Fellowship Program	1	\$ 5,000.00	\$ 5,000.00	Consists of tuition (\$3,000) and travel (\$2,000). Travel will be processed at applicable federal and state per diem rates.
Outreach Consultant	1	\$ 15,000.00	\$ 15,000.00	Calculated based on at least 200 hours of support (\$75/hr.).
School Culture	1	\$ 5,500.00	\$ 5,500.00	Consists of one day on-site training. See appendix E-8.
Classroom-Level Consumables	1	\$ 20,000.00	\$ 20,000.00	Day-to-day classroom supplies utilized in less than one year. See sample items in appendix E-6.
Outreach and Recruitment	1	\$ 20,000.00	\$ 20,000.00	Consists of costs related to designing and printing materials materials.
In-State Meeting/Conference Travel	1	\$ 6,000.00	\$ 6,000.00	Travel-related costs related to attendance at in-state conferences and/or visiting high quality charter schools (at per diem).
Classroom Furniture	1	\$ 20,000.00	\$ 20,000.00	Consists of tables, chairs, bookshelves and student/teacher desks. See sample item in appendix E-6.
Entrepreneurship Curriculum/Books	1	\$ 10,000.00	\$ 10,000.00	Entrepreneurship-related curriculum/books.
EduSnap Data Collectors	12	\$ 200.00	\$ 2,400.00	Contracts with EduSnap data collectors.
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	

Year 3 Implementation Budget Detail

Complete the budget detail below for all year 3 implementation expenses.
 Contact the NC ACCESS Program team if more than 50 rows are needed.

2	3	4	5	6
Item/Expense	Quantity	Unit Price	Total Cost	Description/Notes
Bus	1	\$25,000.00	\$ 25,000.00	1 used bus in good condition
Postage	1	\$ 5,000.00	\$ 5,000.00	Support the school's direct mail marketing effort. Assumes at least 2,500 direct mailed items.
NC REAL Entrepreneurship Certification	3	\$ 3,200.00	\$ 9,600.00	Includes registration (\$2,500), mileage, lodging and meals. Travel will be processed at applicable per diem rates.
Project-Based Learning (PBL) Fellowship	2	\$ 800.00	\$ 1,600.00	Consists of registration (\$600/each) and travel (\$200/each). Travel will be processed at applicable per diem rates.
FirstSchool	1	\$ 12,000.00	\$ 12,000.00	Consists of at least 5 days of on-site coaching and professional development (\$2,000/day, plus travel)
Outreach Consultant	1	\$ 15,000.00	\$ 15,000.00	Calculated based on at least 200 hours of support (\$75/hr.).
Classroom-Level Consumables	1	\$ 22,000.00	\$ 22,000.00	Day-to-day classroom supplies utilized in less than one year. See sample items in appendix E-6.
Outreach and Recruitment	1	\$ 20,000.00	\$ 20,000.00	Consists of costs related to designing and printing materials materials.
In-State Meeting/Conference Travel	1	\$ 6,000.00	\$ 6,000.00	Travel-related costs related to attendance at in-state conferences and/or visiting high quality charter schools (at per diem).
Classroom Furniture	1	\$ 25,000.00	\$ 25,000.00	Consists of tables, chairs, bookshelves and student/teacher desks. See sample items in appendix E-6.
Central Library Furniture	1	\$ 22,800.00	\$ 22,800.00	Consists of tables, chairs and bookshelves. See sample items in appendix E-6.
Library/Media Center/Classroom Books	2,000	\$ 12.00	\$ 24,000.00	Calculated at \$12 per book.
Entrepreneurship Curriculum/Books	1	\$ 10,000.00	\$ 10,000.00	Entrepreneurship-related curriculum/books.
EduSnap Data Collectors	12	\$ 200.00	\$ 2,400.00	Contracts with EduSnap data collectors.
			\$ -	
			\$ -	
			\$ -	
			\$ -	
			\$ -	

B. Budget Narrative

Please outline the budget narrative below.

A. Describes anticipated costs for the duration of the grant period, delineating planning and implementation expenditures

All costs outlined below are related to implementation. In addition to being labeled in the attached budget, items are categorized as Instructional (I) or Support (S) in the narrative below.

Professional Fees and Contracted Services **(\$158,800 – Support)**

Professional Development & Consulting

HCS will use subgrant funds to build staff capacity through the expansion of the school's existing professional development program. HCS will partner with FirstSchool (S), a program through the UNC-CH Frank Porter Graham Child Development Institute. Representatives from FirstSchool will provide onsite professional development and consultation in each year of the grant. Representatives from the HCS Board and parent/community advisory council will be encouraged to participate in this professional development.

To evaluate the level of teaching and learning and student engagement in the school, HCS will use subgrant funds to contract with individuals (up to 12) to conduct EduSnap observations (S) in each year of the project. Also, to build a foundation for a strong school culture, HCS will partner with Learning for Living (S), an organization that has worked with schools and districts across the country, to provide on-site professional development in project years one and two. The allocated amount includes copies of Phil Boyte's book, *School Culture by Design*. HCS Board member and representatives from the parent/community advisory council, the LEAs and local charter schools will be invited to participate in this training.

To effectively implement the school's proposed marketing and recruitment strategy, HCS will partner with an outreach consultant (S) in each project year to assist with the implementation of the school's marketing and recruitment process improvement model (*section C.6*). A draft scope of work for this consultant is provided in *Appendix E-3*.

HCS will use subgrant funds to sponsor participation in fellowship and certification programs. As outlined in *section C.6*, HCS will sponsor the school leader's participation in the NC Education Policy Fellowship Program (EPFP) (S). Participation in this program involves attendance at in-state meetings and retreats as well as a national conference in Washington D.C. The allocated amount includes tuition and travel-related costs, which will be processed in accordance with applicable state and federal per diem rates. Sponsorship is dependent upon acceptance in the program. If the school leader is not accepted, these funds will be reallocated to classroom furniture.

HCS is planning to sponsor two teachers in each project year in the Project-Based Learning (PBL) Fellowship Program (S) offered by the NC Museum of Natural Science. This experience, which includes an immersive field-based experience, will build participants' community of practice, expand content knowledge and increase capacity to develop and implement PBL projects. The line item allocation includes any necessary mileage and subsistence related to participation in the program. All travel-related expenses will be processed at applicable per diem rates. Similar to EPFP, participation in this opportunity

requires acceptance into the program. If not accepted, these funds will be reallocated to classroom furniture.

HCS will also support staff (three in each project year) attendance at an annual certification training event hosted by REAL Entrepreneurship (S). This certification will give participants the insights and resources to help the school incorporate an entrepreneurship focus into its academic program, which will help students develop an entrepreneurial mindset. This line item includes registration, lodging, mileage and any meals not covered by the conference registration.

Service Providers

To ensure and promote the operational health of the school, HCS will use subgrant funds to conduct the school's annual audit (S) and assist in the development of and adherence to charter contracts, policies or by-laws (legal fees) (S).

Supplies and Materials

(\$146,000 – Instructional / \$2,000 – Support)

If awarded a subgrant, HCS will use funds to purchase supplies and materials that will support the activities outlined in this proposal. Namely, in an effort to provide teachers with the general supplies they need to effectively implement the academic program, HCS will use subgrant funds in each project year to purchase classroom-level consumables (I). These items may include pencils, printer paper, toner for classroom printers, folders, etc. Additionally, HCS will use subgrant funds in project year one to purchase materials that support the school's professional development program (S), namely materials associated with the FirstSchool training. Related to curriculum, HCS will purchase entrepreneurship curriculum and books (I) in each project year to support the school's effort to integrate an entrepreneurship focus.

Technology and Equipment

(\$228,400 – Instructional / \$23,800 – Support)

As outlined in the *project budget*, HCS is planning to invest the majority of subgrant funds in this category. Specifically, HCS will purchase classroom (I), front office/administration (S) and computer lab (I) furniture. HCS currently utilizes a lot of older and donated furniture. Investing in classroom furniture will ensure that students have access to a comfortable, organized and collaborative learning environment. By purchasing front office/administration furniture, HCS wants to ensure that the front office space is inviting and welcoming to current and prospective parents and community members. In addition to purchasing computer lab furniture, HCS will also purchase new lab computers (I). HCS' current computer lab contains donated and mismatched furniture and an approximate student to computer ratio of 2:1. Investing in this space will promote increased productivity and encourage frequent use of the school's computer lab.

HCS will also use subgrant funds to purchase staff computers (I) to support classroom instruction and collaborative planning. In recognition of the reality that many students in the local community rarely travel beyond the region or county, HCS will use subgrant funds to purchase Google Expedition kits (I), which will allow students to have globally-connected learning experiences via virtual and augmented reality. The Google Expedition kits will be used in conjunction with a variety of classroom instructional technology items (I). Though sample items are provided, final determinations on specific items will be made using input from HCS staff.

Finally, HCS will purchase a site-based software license in year one to allow for EduSnap observations (S). HCS will cost-share the cost of a site license in years two and three, thus allowing EduSnap observations to be conducted over the project period.

A list of sample items is included in *Appendix E-6*.

Travel, Conferences & Meetings
(\$15,000– Support)

In project years 2 and 3, HCS will also support staff attendance at in-state conferences/meetings, which may include those offered by state agencies, colleges/universities and individual schools (S). This may include the NC DPI EC conference, OCS Leadership Institute, NCDPI Connection Communities of Education Stakeholders Conference, among others. Staff will be asked to submit requests and, once approved, all travel-related expenses will be processed within applicable per diem rates.

Finally, as directed in the process guidance document, HCS has allocated \$3,000 for travel expenses related to the NC ACCESS Fellowship experience (S).

Other
(\$226,000 – Support)

As part of this category, HCS will purchase five used buses in the project period (S), cover costs associated with designing and printing marketing and recruitment materials (S) and postage related to the school’s direct mailing strategy (S).

B. Demonstrates financial viability beyond the expiration of the grant period

HCS will remain financially viable after the grant period due to the school’s decision to structure the proposed activities around sustainable costs. Related to professional development, HCS is sponsoring participation in fellowship and certification programs. This focus on building capacity will enable staff members to provide more in-house professional development after the grant period, thus representing a long-term cost savings. The primary ongoing expenses are related to bus maintenance and a potential increase in the investment in providing free lunches as more economically disadvantaged families are likely to qualify for this service. The HCS Board is prepared to prioritize these costs in the school’s budget moving forward. Much of the ongoing costs will be mitigated as the school’s operational budget increases with the addition of new students. In the unlikely event the school encountered a looming shortfall, the board and administrative team would consider changes to the school’s operational budget and research and pursue other grant-related opportunities.

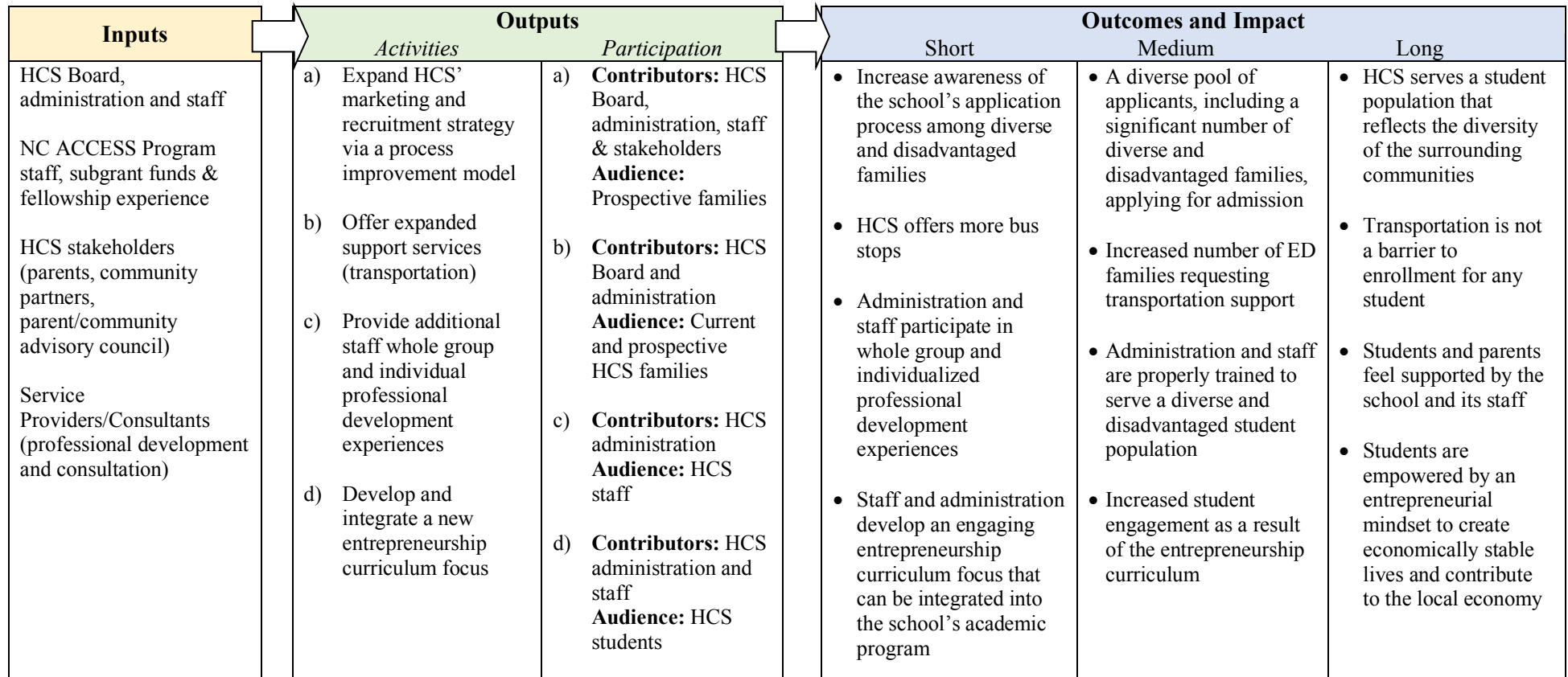
C. Describes how the applicant will have a high degree of autonomy over the budget and operations, including autonomy over personnel decisions.

The HCS Board maintains sole authority over the school’s budget and operations, including complete autonomy over personnel decisions. HCS does utilize the services of a CMO/EMO and therefore is not affiliated with any charter school network.

C. LOGIC MODEL

Objectives

- In each project year, due to the expansion of student services and a targeted marketing strategy, HCS will report the following: 1.) By September 2023, HCS will report a 10% increase in the number of racially/ethnically diverse families that apply for enrollment as determined by representation in the applicant pool and 2.) By September 2023, HCS will serve at least a 73% educationally disadvantaged student population.
- In June of each project year, Hobgood Charter School will report a year-over-year decrease in the number of short-term and in-school suspensions, especially among students with disabilities and economically disadvantaged students.
- In response to surveys administered to staff and current families at the end of the school year in each project year, HCS will report a 5% year-over-year increase in the number of: 1.) Staff that indicate that they have the resources and training they need to serve all students, regardless of any potential educational disadvantage and 2.) HCS families that indicate that they feel supported by the school and that the school's support services are sufficient for meeting the needs of all students.



Assumptions

- Acceptance into certain professional development opportunities (i.e. fellowships)
- Staff embrace additional professional development opportunities
- Entrepreneurship engages students' interest
- A more targeted marketing and recruitment strategy results in increased interest

External Factors

- Updates to education-related statutes and SBE policies
- Changes in population and demographics in surrounding communities

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).	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Hobgood Charter School is located in Halifax County, a rural and tier 1 county (<i>County Distress Rankings</i> , NC Department of Commerce). The school is classified as “Rural, Distant” in the state’s Educational Directory and Demographical Information Exchange (EDDIE) system.	
Increasing the racial and ethnic diversity in their new, expanded, or replicated school.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
HCS is committed to serving a more diverse and disadvantaged student population. As outlined in <i>goal 1</i> , the school, through the activities outlined in this proposal, plans to closely monitor and increase the racial/ethnic diversity of its student population.	
The inclusion of high school (9-12) grade levels.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
The school currently doesn’t offer high school grades; however, the school has submitted a formal request to add 9 th grade. This request will not be considered until after the NC ACCESS subgrant due date. Therefore, if the request approved, it is possible that HCS will offer 9 th grade in the next academic year, in which case the answer will transition from “No” to “Yes.”	
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

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
HCS serves a 66.96% economically disadvantaged population (<i>Appendix D-1</i>).	
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 checked="" type="checkbox"/> No <input type="checkbox"/>
See <i>Appendix D-1</i> .	
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.



Signature of Charter School Authorized Representative

2-29-2020
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 A: School Performance Data

**Not Applicable
New School**

Appendix B: Contractual Agreements with Partner Organizations

Not Applicable

Letters of Support from Partners Provided in Appendix E

Appendix C: Evidence of Competitive Preference Standards

See Section V

Appendix D: Evidence of Priority Consideration Status

Appendix D-1: Title 1 Documentation

- NCCCIP Home
- Administer ▶
- Search ▶
- Inbox ▶
- Planning ▶
- Funding ▶
- Project Summary
- LEA Document Library
- Address Book
- NCDPI Resources
- Help for Current Page
- Contact NCDPI
- NCCCIP Sign Out

Building Eligibility

Hobgood Charter School (42B) Charter District - FY 2020 - Consolidated - Rev 0 - Title IA

Save And Go To ▶

Organization Code	School Name (1 Buildings)	Grade Span	Total Resident Children	Low Income Students			
				Original Number	Final Number	Original Percent	Final Percent
42B000	Hobgood Charter School - New	KG - 08	224	150	224	66.96 %	100.00 %
Totals:			224	150	224	66.96 %	100.00 %

Harris, Juliana

Appendix E: Additional Supplementary Documentation

Appendix E-1: HCS Charter Application

Appendix E-2: *Intentionally Diverse Charter Schools: A Toolkit for Charter School Leaders*

Appendix E-3: Sample Statement of Work (Outreach Consultant)

Appendix E-4: NC Education Policy Fellowship Program Flyer (included with permission of the program)

Appendix E-5: *Colorado Charter School Sample Closure Framework*

Appendix E-6: Sample Item List

Appendix E-7: Letter of Support (FirstSchool)

Appendix E-8: Learning for Living Professional Development Information (included with permission of the program)

Appendix E-9: 2019-20 School Calendar



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Hobgood Charter School

Public charter schools opening the fall of 2020

Due 5:00 pm EST, October 1, 2018

North Carolina Department of Public Instruction
NCDPI/Office of Charter Schools
301 N. Wilmington Street
Raleigh NC 27601-2825
919-807-3491

Mailing Address:
6307 Mail Service Center
Raleigh, NC 27699-6307

**CHARTER SCHOOL
2018 Application Process
To open a charter school in the 2020-2021 school year**

APPLICATION DUE DATE/TIME

October 1, 2018

A complete **online** application package, in the Office of Charter Schools **by 5:00 pm EST.**

Non-Refundable \$1000 Application fee due to the Office of Charter Schools

Application Fee Payment Details can be found on the Office of Charter Schools Website

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline October 1, 2018 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

1. All required Appendices should be clearly titled, include page numbers (i.e. Appendix A and page numbers as- A1, A2, B1...), and submitted in the appropriate places within the application.
2. **Any** answer given within the application which is not original to the applicant, the applicant must provide a citation to the source of the answer.
3. Review all elements of your application for completeness before submitting.
4. **Any** document attached to the application or within the online system **must be** in PDF format.
5. Late submissions **will not** be accepted. No exceptions.

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: Hobgood Charter School

—

Has the organization applied for 501(c)(3) non-profit status: Yes No X

Name of non-profit organization under which charter will be organized or operated: *Hobgood Charter School*

Provide the name of the person who will serve as the primary contact for this Application. The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application.

Name of contact person: *Nicole Flanary*

Title/Relationship to

nonprofit

: *Board Member*

Mailing address: 201 Beech St.
Hobgood NC 27843

Primary telephone: 252-813-3530 *Alternative telephone:* 252-826-4116

E-Mail address: nbf0315@earthlink.net

Name of county and local education agency (LEA) in which charter school will reside:

County: HALIFAX

LEA: 420-Halifax County Schools

Was this application prepared with the assistance of a third party person or group?

No:

Yes: X

If so, provide the name of the third party person or group. Gregg Sinderson, Team CFA

List the fee provided to the third party person or group. none

Provide a **full** detailed response of the assistance provided by the third party person or group while preparing this application and when the assistance will end.

Gregg Sinderson met with the Board of Directors of Hobgood Charter School on several occasions as they discussed the charter application and what role, if any, his Team CFA could fill. He agreed to mentor Hobgood Charter School at no cost, and HCS will hire Team CFA to run our financial program and Power School.

Is this application a Conversion from a traditional public school or private school?

No:

Yes: X

If so, Public or Private: X

If a private school, give the name of the private school being converted: Hobgood Academy

If a traditional public school, give the name and six-digit identifier of the traditional public school being converted:

Submit the following evidences to support the conversion of the traditional public to a charter school:

- Statement of Support signed by the majority of the teachers and instructional support personnel currently employed at the school
- Last payroll outlining current staff receiving compensation from the traditional public school
- Current school enrollment
- Parent support of the conversion

Outline the 3 year financial history of the proposed converted charter school in the chart below and attach the past 3 year tax returns.

Financial History 3 Years Prior	Financial History 2 Years Prior	Financial History 1 Year Prior
Form 990 YR 2016	Form 990 YR 2017	Form 990 YR 2018

Is this application being submitted as a replication of a current charter school model?

No: X

Yes:

Acceleration

Yes: X

No:

The State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high quality charter schools. In considering whether to accelerate the planning year, the applicant must meet the following requirements:

**Demonstrate a clear and compelling need for the accelerated planning year*

Hobgood Academy has operated as a private school since 1969. We are requesting approval for an accelerated planning year because we have an existing facility to house the projected enrollment and there is a strong community interest. We are committed to participating in the planning year while the application is being reviewed without any guarantee of charter approval. From its founding days, Hobgood Academy has been educating students to succeed in the world. Our graduates include doctors, lawyers, historians, engineers, entrepreneurs, farmers, pastors, and teachers. Unfortunately, only students from economically secure families were able to attend. As a free, public charter school we will be able to encourage all area scholars to make application for enrollment. Many that were unable to afford private tuition will be able to apply and attend Hobgood Charter School. This economically distressed community cannot wait. The NCDPI report card just published shows Halifax and Edgecombe counties as Low Performing Districts with 70% and 71.4% of schools ranked as Low Performing respectively. The only county with a higher percentage of Low Performing schools is neighboring Northampton county with 85.7% Low Performing. Most of these Low Performing schools are also ranked as Recurring Low Performing. According to www.countyhealthranking.org in 2015, out of 100 NC counties,

Halifax County ranked next to last at 99, Edgecombe County ranked 87 and Martin County ranked 80. The Center for Disease Control states that physical well-being impacts educational success. Our partnerships with Action for Healthy Kids, based in Chicago, IL, with a local branch in Cary, NC, and with East Carolina University's School of Health and Human Performance will help us make an immediate impact on our community. The percentage of students in our community with childhood trauma is among the highest in the state. CDC has determined that these Adverse Childhood Experiences lead to higher rates of mental illness along with higher rates of physical illness such as cancer, high blood pressure, and liver disease. Confronting these issues are critical to the success of our students. Our children deserve the best we can provide. Hobgood Academy currently has a staff of highly skilled teachers in grades committed to serving this community. This will be an advantage when we begin recruiting and hiring for the charter school. The opportunity to become a charter school on an accelerated schedule would ensure that Hobgood Academy would transition smoothly to Hobgood Charter School. The Town of Hobgood is in negotiation with an international company in bio-technology to locate its headquarters here. That would drastically affect the economic opportunity for this area providing families high-paying job opportunities. We are committed to providing school choice for all scholars regardless of parents income, race, or address. Each building block is necessary for success. Hobgood Charter School is key in furthering this process. The Board of Directors of Hobgood Academy participated in the charter school planning sessions at NCDPI over the past two years to enhance our knowledge about becoming a successful charter school. We have expanded our board to include experts in Charter schools and finance. We are ready and able to add another year of planning and open an amazingly successful charter school in 2019-2020.

Demonstrate an exceptional need for the charter school in the proposed location

Hobgood Charter School will be located at the southern end of Halifax County, adjacent to the northern end of Martin County and the eastern end of Edgecombe County. All three counties are designated Tier 1 in the 2017 County Tier Designation. This is due to the extreme poverty rates. Furthermore, Hobgood is at the furthest tip of the county and its families are underserved. The location of Hobgood Charter School at the intersection of these three Tier 1 counties make it a perfect place to impact the most vulnerable of our children. Research confirms that poverty negatively impacts education. We see this in the low performance of so many of our local schools. This school will change the economic and educational outlook for our community by attracting industry to locate here. The Halifax County Economic Development and the Hobgood Revitalization Committee are supportive and encouraged by our efforts. Team CFA is a charter management organization based in Forest City, NC. They have 14 existing charter schools as part of their network. While we are not requesting approval for Team CFA to serve as CMO, they will provide financial and Power School services. They have served as trusted advisors to the board.

Edna Andrews Elementary in Hamilton and East End Elementary in Robersonville were closed at the end of the 2017-2018 school year to be combined in the former South Creek Middle School in Martin County, 20 miles from HCS. The closest elementary school in Halifax County is 12 miles away in Scotland Neck and the closest middle school is over 20 miles away in Enfield. Students in our area spend hours each day on the school bus. It is

unacceptable for children to be waiting for the bus before 6am. Parents are desperate for a neighborhood school. We can operate a K-12 charter school that offers individualized instruction and a chance for cooperative learning across the entire grade spectrum with older students mentoring younger students on a regular basis. We will be building a sense of community within the school walls and then into the community at large. Widespread support exists for this charter school from all segments of this diverse community. Churches, civic organizations, and town government have highly affirmed our efforts and are committed to support Hobgood Charter School. We have a building complex, which includes three educational buildings, a gymnasium, and a lunchroom, as well as an athletic complex which includes a baseball field, softball field, football field, and field house. This property is being purchased by the Julia Carr Family Trust and will be leased to the board for \$12,000 per year, which is about 1% of the projected revenue. Board members of Hobgood Charter School have formed a new nonprofit to govern the school. Some board members have served on the nonprofit that oversees the private school. This board has been in existence since 1969.

Agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award.

Yes: X

No:

Is a facility identified by the applicant that is feasible for opening on an accelerated schedule.

Yes: X

No:

Demonstrate that the facility identified by the applicant is feasible for opening on an accelerated schedule.

The facility chosen by Hobgood Charter School is currently operating as a private school. It includes three educational buildings, a lunchroom, and a gymnasium. Additionally there is a playground and an athletic complex including a baseball field, a softball field, a football field, and a field house with bathrooms. This facility is being purchased by the Julia Carr Family Trust and a five year lease agreement with the board of HCS is in place for \$12,000 per year, roughly 1% of the projected annual revenue.

Attach Appendix A1 to demonstrate you have a facility secured for opening on an accelerated schedule.

Once evidence for the requirements has been verified, the State Board will also consider the presence or absence of the following factors in making its determination:

- 1. Unique mission and educational program.*
- 2. Local, state, and national nonprofit partnerships committed to assisting the school.*
- 3. Potential for economic and educational development of the region.*
- 4. Mentoring by a successful organization that has experience in creating public schools.*
- 5. Obstacles to educational reform efforts that leave chartering as an available option.*
- 6. Commitment to work with a successful charter school board as a guiding mentor.*
- 7. The length of time the board of directors has existed.*
- 8. Whether the proposed board has previously or currently operates a successful public charter*

school.

The above list is not exclusive or controlling and is intended to guide the exercise of the State Board's discretion. An applicant requesting acceleration must submit the request to the State Board of Education prior to the application due date for consideration.

In order to qualify for designation as an "alternative school" for purposes of accountability under this policy, the charter school must demonstrate that it serves a student population as follows:

1. The school must include grades 9-12.
2. At least 75% of the school's population in grades 9-12 must be at-risk of academic failure as defined in GCS-Q-001, I.B, and must also meet one or more of the following indicators:
 - a. The student must either be recently released from a juvenile justice facility, or otherwise be subject to and participating in the juvenile justice court process;
 - b. The student must be currently served by a treatment facility licensed pursuant to Chapter 122C of the General Statutes, or have recently been discharged from such a facility;
 - c. The student must be currently under long-term suspension from a public or private school ; or
 - d. The student must be a high-school dropout as defined in GCS-Q-001; or be imminently at risk of dropping out as demonstrated by adequate documentation in the charter school's application for designation under this policy.

Yes:

No:

A charter school meeting the eligibility criteria set forth in this policy and seeking designation as an "alternative school" must submit an application to the Office of Charter Schools describing in detail the school's mission as it relates to the request for designation; the criteria the school plans to use that will meet the eligibility requirements set forth above, including the documentation the school will use to support its admissions process; how the school intends to serve the select population, educationally and otherwise; and the goals the school is setting for academic achievement for this population. The application must also include an admission plan that is well-defined and specifically limited to serving at-risk students as described in the application. A plan that is not well-defined will not be approved.

The School must, in its application, designate which of the alternative accountability options it is requesting under GCS-C-038. The option selected, if approved, cannot be changed except at the time of renewal.

What is the name of the nonprofit organization that governs this charter school? Hobgood Charter School

Is this application for Virtual charter school: Yes: No:

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2019 Month August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (5 Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K, 01, 02, 03, 04, 05, 06, 07, 08	225
Year 2	K, 01, 02, 03, 04, 05, 06, 07, 08	250
Year 3	K, 01, 02, 03, 04, 05, 06, 07, 08	275
Year 4	K, 01, 02, 03, 04, 05, 06, 07, 08	300
Year 5	K, 01, 02, 03, 04, 05, 06, 07, 08	325

The State Board of Education provides funds to charter schools, approves the original members of the boards of directors of the charter schools, has the authority to grant, supervise, and revoke charters, and demands full accountability from charter schools for school governance, operations, finances and student performance.

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

I certify that I have the authority to submit this application, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after 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 non-profit organization. Additionally, the board is aware that if this application is approved by the State Board of Education, the approval is contingent upon successful completion of such planning year.

hcharter

Signature

Vice Chairman HCS Board

Title

hcharter

Printed Name

09/27/2018

Date

II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

*State the Mission of the proposed charter school in **thirty-five words or less**. The mission statement defines the organization's purpose and primary objectives, describing why it exists. The mission statement provides the foundation for the entire proposal.*

The mission statement of the proposed charter school is as follows:

Hobgood Charter School is committed to a holistic approach to excellence: academically, physically, emotionally, and socially. Through rigorous small group instruction, multi-age collaboration, and community involvement students will establish patterns for healthy, lifelong learning.

Clearly describe the mission of the proposed charter school:

Hobgood Charter School is committed to excellence by helping each student achieve his or her potential in a rigorous, supportive environment. Our school also provides opportunities for students to build character that values sound judgement, exemplary behavior, and respect for their fellow man. Each student will be equipped to lead a healthy, productive life that is economically stable, moral and fulfilling. Collaboration among all stakeholders is essential to the achievement of this mission.

Educational need and Targeted Student Population of the Proposed Charter School:

- 1. Provide a description of Targeted Population in terms of demographics. In your description, include how this population will reflect the racial and ethnic composition of the school system in which it is located. Describe the rationale for selecting the location and student body.*

Hobgood Charter School targets students who live in the Town of Hobgood and its surrounding communities including the southern end of Halifax County, the northern end of Martin County, and the eastern end of Edgecombe County. The racial and ethnic makeup of Hobgood in 2014 according to citydata.com was 49.8 African American, 46% White, 4% Hispanic and ,6% Multi-racial. Suburban Stats identifies Halifax Countys racial and ethnic composition as 53% African American, 40% white, 3% American Indian, 2% Hispanic, while Edgecombe County is 57% African American, 38% White, 3% Hispanic, and Martin County is 43% African American, 53% White, 3% Hispanic. A high level of poverty exists in this area evidenced by the fact that all three counties are designated as Tier 1 in the 2017 County Tier Designation. We believe that Hobgood Charter School will reflect these demographics. The rational for locating a charter school in this location is that we believe the potential exists to turn the tide of poverty in this community through excellence in education. We believe that well prepared students can be a springboard to economic development. One of our new businesses in Hobgood, Criticality LLC is working with ECUs department of research and economic development on this issue. The Halifax County Economic Development Commission struggles to entice businesses that pay well to locate in Halifax

County because of a lack of skilled and employable workforce. This is especially true here at the rural end of the county where Hobgood is located. It is a vicious cycle of poverty and low-performing school. Rural students need and deserve to have educational options and Hobgood Charter School hopes to provide an excellent option that will begin to create economic growth and healthy communities.

- 2. What will be the total projected enrollment at the charter school and what percentage of the Average Daily Membership (ADM) does that reflect when compared to the Local Education Agency (LEA) of the same offered grade levels? (i.e. If the proposed school will be grades 9-12, only compare the total enrollment to the total enrollment of the LEA is grades 9-12).*

The projected enrollment at Hobgood Charter School is 225 students and will include grades K-8. Based on our current enrollment percentage by the counties of our targeted population and feedback from meetings, we expect to draw 54 students from Edgecombe County, which is 1.34% of their Average Daily Membership (ADM) in Grades K-8. We expect 108 students from Halifax County, which is 6.05% of their ADM. Finally, we expect 63 students from Martin County, which is 2.80% of their ADM.

- 3. Explain how the charter school's education plan will compare to or differ from that of the local LEA(s).*

The educational plan at Hobgood Charter School is founded on instruction that is focused on a whole child, constructivist approach to teaching and learning based on the premise that learning occurs as students are actively involved in a process of meaning and knowledge construction as opposed to passively receiving information. The instructional vision for HCS is that as visitors walk through the school, students are engaged with meaningful literacy experiences across the curriculum, working collaboratively with other students and teachers where metacognition or 'thinking about one's own thinking' is the driving force in problem solving, and 21st century skills are being developed in every lesson, activity, and project. HCS will focus on building its students with the stamina, curiosity, and ambition it takes to solve real-world problems that can ultimately be transferred to improving their communities and lives. The curricula are philosophically aligned to promote ongoing interactions, develop active listening skills, and be prepared to respond to feedback and challenges in positively responsive ways. Reading and writing will be approached in a paralleled workshop format utilizing Lucy Calkins' Units of Study where students will learn to critically analyze literature for meaning while also having opportunities to create their own pieces of literature based on the information they have learned during the workshop. This approach is fluid in nature, allows learning to be personalized through constant conferring with teachers, and provides students the opportunity to view reading and writing as opportunities as opposed to requirements. The math curricula selected, Investigations 3 and Open Up Resources 6-8 Math, which recently received the highest-ever rating from EdReports, poses mathematics in a real-world sense where math is seen as a practical tool for navigating the world. In far too many schools, core curriculum is presented in ways that are impersonal and unconquerable for students who do not come from homes where opportunities abound. It is our goal to change that perception for students where they develop a strong desire to learn more and to crave opportunities that challenge their minds.

4. *In the appendices (Appendix A1), you must provide evidence through a narrative or visual of this educational need through survey data, or times and locations of public meetings discussing this proposed charter school. (Please do not provide more than one sample survey form).*

Purposes of the Proposed Charter School: *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations.*

The Six Legislative Purposes of a Charter School are:

1. *Create new professional opportunities for teachers, including the opportunities to be responsible for the learning program at the school site.*
2. *Hold schools accountable for meeting measurable student achievement results.*
3. *Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system.*
4. *Improving student learning.*
5. *Increasing learning opportunities for all students, with a special emphasis on at-risk or gifted students.*
6. *Encourage the use of different and innovative teaching methods.*

Hobgood Charter School recognizes the need to address all six of these Legislative Purposes of a Charter School, and hopes to set goals to achieve each of these as we grow and develop as a charter school. The first goal that we have selected to address is 3) provide parents and students with expanded choices in the types of educational opportunities that are available in the public school system. Hobgood Charter School will be a fully integrated K-8 school focused on collaboration, small group instruction, community involvement, and healthful living. A K-8 school offers students an opportunity to be involved in mentoring, both as a mentor and a mentee, which according to youth.gov results in higher college enrollment rates, better attitudes toward school, increased graduation rates, enhanced self-esteem and self-confidence among other documented benefits. As a community school, parents will have easy access to the school, expanding opportunities for parent involvement. Rural families typically lack choices in education. We believe that all students deserve access to choices, not just those who can afford tuition-based schools. Hobgood Charter School desired to meet the need for excellent educational options within the public school system.

Additionally, we have selected 4) improving student learning as a crucial first year goal. According to 2016 data, less than 40% of the elementary students in Halifax and Edgecombe Counties met proficiency levels in Math and Reading. We believe our educational model will be more successful. We can actively engage our youngest learners at the highest levels through our curriculum and monitor their progress through the 8th grade. As student health is a specific focus of HCS, our instructional plan includes brief physical activity breaks which CDC suggests increases levels of concentration, memory, and on-task behavior. The Conscious Discipline

social-emotional framework will teach students how to self-regulate their emotions leading to more effective problem solving in social situations and increased learning. This may be effective in countering the effects of childhood trauma. Multi-aged activities, such as gardening and physical fitness, will provide a unique opportunity for interactions not possible in traditional settings that will increase student motivation and innovation. We fully expect to see improved student learning.

Goals for the Proposed Charter School:

- 1. Provide specific and measurable goals for the proposed school for the first 5 years of operation outlining expectations for the proposed school's operations, academics, finance, and governance. Address how often, who, and when the information will be communicated to the governing board and other stakeholders.*

Hobgood Charter School believes that setting specific goals and measuring the outcomes is a roadmap to success; therefore, we have set expectations for academics, wellness, operations, finance, and governance in the first 5 years of operation as follows:

ACADEMICS In year 1, students are expected to meet or exceed proficiency of surrounding LEAs. Student achievement should meet or exceed expected growth each year after establishing a baseline from Year 1 state assessments. Progress will be monitored through interim formative assessments and measured using NC EOG scores. By year 5, 80% of students should meet proficiency on EOGs. Student achievement will also be measured by promotion and retention standards set by the school. Teachers are expected to attend professional development provided in order to insure full understanding in implementation of the curriculum.

WELLNESS Create an environmental climate that encourages physical activity, healthy nutrition, and positive interpersonal relationships. This will be measured by attendance and disciplinary referral data. Average daily attendance should be at least 94% for the first 2 years and 96% by year 5. Elementary students will participate in at least 30 minutes of active play each day and participate in PE weekly. Middle school students will have Health/PE classes each day.

OPERATIONS Transportation should run smoothly with all students arriving at school on time and all bus inspections being completed and bus driver licensing remains current. We will insure every child has access to a healthy lunch as established by our school lunch program. Further evidence for these goals will be parent/student satisfaction surveys with at least an 85% positive rating.

FINANCE Operate within budgetary guidelines established each year and create a surplus of funds each year. The goal for Year 5 is to have a positive general fund balance of over 1 million dollars. This will be measured by presentation of the audit report.

GOVERNANCE Diligent governance is extremely important to the success of the school. The School Improvement Plan will be established with set goals that will be monitored by the SIT and presented to the Board annually with updates provided at Board meetings. It is the goal for all board members to attend 100% of the monthly board meetings and the Annual meeting. Members must attend a minimum of 2 training sessions each year. Strategic planning based on the assessment will take place at the Annual meeting each July. The board will also be assessed on marketing. The measure used will be positive enrollment growth each year. Another goal is to involve the community in

fundraising and volunteering at the school. This can be measured by participation in our Parent/Teacher Organization and volunteer/parent sign-in sheets. Teacher satisfaction is a goal of the Board. This can be measured by satisfaction surveys, the Teacher Working Conditions Survey, and teacher retention rates of 90%.

The progress on these goals will be addressed by the Lead Administrator in monthly board meetings which are open to parents and the public. Board members will discuss any need to address these goals. An Annual meeting will be held each July to assess the yearly results and strategize for the next year. The Lead Administrator will also be present at the Parent-Teacher Organization meetings to update parents.

2. How will the governing board know that the proposed public charter school is working toward attaining their mission statement?

Hobgood Charter School Board of Directors will meet on the 3rd Monday of each month. The Lead Administrator will report to the Board with status updates on items relating to the achievement of the schools mission statement at each of these meetings including curriculum implementation, student achievement, attendance data, discipline data, and family/community involvement. The Board members are encouraged to participate in activities sponsored by the school and volunteer/visit in classrooms as appropriate in order to see the work in action.

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

III. EDUCATION PLAN

(No more than ten total pages in this section)

NOTE: *All sections of the Education Plan should align with all other sections of this application. The State Board of Education shall give priority consideration to the applicants who demonstrate potential for significant, meaningful innovation in education. Provide precise and clear explanations. Lack of response to any question or proper documentation will deem the application incomplete.*

Instructional Program:

Provide a detailed description of the overall instructional program of the proposed charter school, including major instructional methods, assessment strategies, and explain how this instructional program and model meet the needs of the targeted student population.

HCS will deliver instruction that is rigorous and relevant for all students. The instructional staff will utilize a whole child, constructivist approach to teaching and learning based on the premise that learning occurs as students are actively involved in a process of meaning and knowledge construction as opposed to passively receiving information. Using this approach, the North Carolina SCOS will be the foundation for content standards upon which instructional staff will build and expand while addressing the developmental domains of students. Using a constructivist approach, the instructional staff will engage students in an array of evidence-based strategies including the following:

- Establish an emotionally and physically safe learning environment through the implementation of Conscious Discipline focusing on pro-social behaviors and teaching strategies of social problem-solving
- Focus on building relationships to create a sense of community using Conscious Discipline through teaching acceptance, appreciation of differences, and capitalizing on assets each student and family has to offer
- Design instruction that focuses on the development of students in all developmental domains
- Integrate content across the curriculum
- Incorporate student choice and interests, often neglected in traditional public schools
- Focus on explicit vocabulary instruction
- Capitalize on student strengths and needs using small group instruction including project-based learning, guided reading K-4, and intervention/enrichment opportunities
- Utilize inquiry-based learning opportunities such as project-based learning which has been shown to improve the attendance of economically disadvantaged students as compared to traditional teaching styles
- Extend learning beyond the walls of the classroom through outdoor learning (school gardens)
- Provide meaningful, hands-on learning experiences
- Assess student understanding using formative assessment strategies, teacher-designed benchmarks, and summative assessments including state assessments. Students at HCS will engage daily with core content areas. Teachers will engage students in a workshop approach for reading and writing utilizing Lucy Calkins Units of Study. Utilizing this curriculum promotes the mindset that reading and writing are interrelated, challenging, allow one to reach obtainable goals, and most of all are enjoyable. Students will explore the

construction of words utilizing the Words Their Way program. Students in grades K-4 will engage daily in guided reading lessons from Jan Richardsons Literacy Footprints curriculum. Skills taught in core content areas will provide the foundation for completing inquiry studies in project-based learning where content is integrated and presented in a real-world manner. Teachers will utilize a combination of Buck Institute Gold Standard and High-Quality Project-Based Learning Frameworks to guide the instructional process for classroom project learning. This combination of curricula and approaches allows the instructional staff to assist students in developing critical thinking skills thus preparing them for next phases of learning.

Another area of focus includes physical and emotional well-being. Within each day, students will be provided learning opportunities focused on health-based content to promote healthy lifestyles which will have immediate benefits including increased concentration, higher rates of attendance, and positive classroom behavior. Conscious Discipline, Energizers, and partnership for Action with Healthy Kids will support these areas of development.

Assessment will be an ongoing process that minimally interrupts the learning cycle. HCS will utilize the following:

- NWEA formative assessments
- Curriculum-based assessments based on Essential Questions
- Portfolios
- Student learning journals
- Rubrics
- State-required assessments

Teachers will use data to fill gaps, accelerate, and personalize learning.

Curriculum and Instructional Design:

Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

Classrooms at HCS will be primarily classroom-based with opportunities for outdoor learning, as well. Students in the elementary and middle grades will be provided opportunities to cultivate an understanding of life cycles and farm to table concepts through our school gardens focusing on the growing and eating of vegetables that support healthy nutrition. All students will benefit from the harvest of these foods through seasonal snack opportunities.

Class size will be capped at 25 per grade level. Elementary classrooms will be self-contained in nature with opportunities to engage in workshops which support one-on-one conferring between teacher and student, small group instruction, learning stations and multi-age group projects such as the outdoor gardens and teaming with middle school students for mentoring opportunities. A full-time teacher assistant will be designated for kindergarten and first grade classrooms with a shared teacher assistant for second and third grades. Students will have access to specialist classes including music, art, and physical education. 6th-8th grade students will be offered electives including technology exploration along with PE, art, and music. 7th and 8th grade classes will be departmentalized with one teacher being responsible for language arts and social studies and a second

teacher responsible for math and science. Students in middle school will have multi-age group opportunities based on academic achievement and student interests in electives and within their coursework as units of study allow. Students will also work with the Community Health Coach in partnership with Edgecombe Community College to focus on a future in healthy lifestyles and health careers.

Teachers at each level of learning will be considered facilitators of learning as opposed to holders of knowledge. With a constructivist approach at all levels, we anticipate students to grow in their level of curiosity and depth of knowledge as well as their ability to seek answers to their own questions, the truest form of lifelong learners. Students' interests and strengths will be capitalized upon to provide opportunities to delve deeper into units of study independently or in smaller interest groups.

Provide a synopsis of the planned curriculum, including:

1. *One sample curriculum outline (in graph form) in the Appendices (Appendix B) for one core subject (specific to the school's purpose) for each grade span (i.e. elementary, middle, high) the school would ultimately serve.*
2. *If you are proposing a high school, as Appendix B2, provide a visual disseminating what courses (core content and electives) will be offered at the charter high school to ensure students meet the proposed charter school's graduation requirements. Please ensure the projected staff and budget aligns with the course offerings.*
3. *Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model.*

HCS will provide a comprehensive, rigorous learning experience for every child focusing on all domains of development using a learner-centered, constructivist approach. Personalized learning through the use of a variety of data will drive daily instruction and program planning. Along with capitalizing on student interest and motivation through a workshop approach to literacy and inquiry-based learning, each student's strengths will be identified, built upon, and used to enhance areas of need. Students' physical and emotional health and well-being is also a major vehicle in which academic achievement will be obtained leading to a lifetime of success.

The instructional staff at HCS will be encouraged to use a variety of resources to enhance learning and develop projects to support the teaching of the NC Standard Course of Study. HCS will utilize Lucy Calkins Units of Study for reading (K-8), writing (K-8), and phonics (K-2). In the core area of mathematics, the school will utilize Investigations (K-5) and Open Up Resources 6-8 Math. Teachers are encouraged to utilize and develop innovative lessons that capitalize on students' strengths and needs, interests, and are grounded in standards upon which the NC Accountability Model is based. Although the instructional staff will be provided autonomy in many ways, it is the expectation that specific strategies be utilized to support a range of learners thus meeting the needs of EC, AIG, and EL learners (see specific sections). Economically disadvantaged learners are also of specific focus and will benefit from strategies including explicit vocabulary instruction and integration of literacy instruction in all content areas. Students in grades K-4 will engage in guided reading.

instruction daily with teachers utilizing the Jan Richardson model.

Research indicates that children living in economically impoverished homes have the best opportunity for achieving at grade level when they are taught with a focus on small group instruction, peer collaboration, opportunities for oral language, vocabulary development, and metacognition (FirstSchool, 2013). Both workshop and project-based learning models encompass each of these elements. The instructional staff at HCS will engage students in project-based learning following the frameworks of the Buck Institutes Gold Standard and High-Quality Project-Based Learning to insure learning is targeted and rigorous. Students at HCS will be held accountable for their learning by being required to articulate their learning through periodic check-in assessments, class and small group discussions, project assignments and presentations, and written responses to elements of the Essential Questions established by teachers which will provide continuous feedback for adjustment to instruction immediately.

With a target group focus on children from economically disadvantaged homes, HCS will work to combat documented long-term effects of poverty such as obesity and heart disease through a strong emphasis on physical well-being. By providing continuous education in grades K-8 on the importance of physical exercise, healthy food choices, and healthy lifestyles, all students from HCS will graduate with a knowledge of how to maintain a healthy body, positively impacting the physical effects of poverty on students lives.

According to the National Center for Children in Poverty, poverty can contribute to social and emotional difficulties often resulting in displays of aggression, hyperactivity, and conduct problems in school. Research indicates that schools who implemented Conscious Discipline, the choice curriculum for social-emotional learning at HCS, reported a decrease in discipline referrals related to behaviors such as hyperactivity and aggression, increased academic achievement, improved school culture, and healthier social and emotional skill sets for students leading to more positive school experiences.

4. Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.

Professional development for instructional staff will begin upon hire and/or prior to the first day of school and will continue to be the schoolwide professional development focus for a minimum of 3 years in order to achieve the desired level of expertise as suggested in high quality professional development models. The following are professional development endeavors that build the fundamental framework for instructional staff at HCS:

- *Lucy Calkins Workshop Model for reading and writing
- *Inquiry-based learning with a focus on project-based learning
- *Formative assessment strategies
- *Guided Reading
- *Ruby Paynes Framework for Understanding Poverty
- *Cultural Competence for Educators
- *K-8 Energizers

*Guiding Principles of Action for Healthy Kids

*Conscious Discipline

Within these professional development endeavors, instructional staff at HCS will build upon and be expected to demonstrate mastery of the following instructional strategies:

1. Conferencing: Teachers must be skilled at conferencing with students in both the literacy workshop model and project-based learning. They must also be able to utilize these skills in assisting students as they develop self-regulation, helping children talk through social problems and their emotional upset followed by making plans for different outcomes in social situations after incidences of upset. Conferencing with parents is another skillset and will be critical to building and maintaining positive relationships with families with particular focus on the use of cultural competence, demonstrating respect for all families.

2. Formative assessment process: Using formative assessment builds students metacognition, increases students motivation, resulting in self-regulated life-long learners. It allows teachers to provide actionable feedback that is used to adjust ongoing teaching and learning strategies to improve attainment of learning goals.

3. Analysis of student work: Teachers must have a solid understanding of the standards and curriculum they are teaching as well as their goals and expectations for student learning and performance. Teachers must be skilled at scaffolding small group conversations in which students are providing feedback to one another as well as engaging in conversations during PLCs or parent conferences discussing the aspects of student work.

4. Effective questioning: Teacher questioning that promotes critical thinking, metacognition, and supports multiple feedback loops is critical in engaging students in deep conversations about the curriculum and their work.

5. Vocabulary instruction: Vocabulary instruction is noted as one of the premier strategies in closing the achievement gap for students from economically disadvantaged homes. It is also key for other populations including EC students and EL students. Teachers must be able to clearly identify vocabulary that is key to learning in order to advance students' acquisition of content and then establish an environment in which students are expected to utilize them in dialogue.

6. Hands-on learning: It is well-documented that students at all levels of learning benefit from concrete, hands-on learning to stimulate different regions of the brain. For younger learners, EL learners, and those with learning disabilities, thoughtful, hands-on strategies are their keys to learning. Students at HCS will engage in this approach through the use of math manipulatives, outdoor learning, and project-based learning.

7. Inquiry-based learning including project-based learning: Students will benefit from personal experiences with content through inquiry-based learning. Field work, investigations, individual and group projects engage students in developing questions, seeking evidence to answer questions, and articulating their findings.

Each of the research-based strategies listed have been documented to improve student achievement for a variety of populations including those who will be served at HCS.

5. Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program

completion.

The curriculum at HCS is aligned grades K-8 with a consistent focus on standards, methodology, instructional strategies, and a focus on rigor, critical thinking, problem-solving, and whole-child development. HASC strives to have 100% of our students proficient on all end-of-grade state tests administered at our school. At the K-2 level, we strive to insure every child meets the reading benchmarks for Reading 3D and a score of At Standard for the NC K-2 Math Assessment.

At the beginning of each school year, parents will be provided a curriculum outline with gradelevel requirements to successfully move to the next grade in order to promote awareness of goals and expectations. Students and parents will receive progress reports on the 15th day of each 30-day grading cycle. Report cards will be sent home with students at the end of each 30-day grading cycle. Parent/Teacher conferences will be held at the conclusion of the 1st and 4th grading periods and at any other time as deemed necessary by the teacher or at the parent's request.

Standards-based grading for grades K-2 will be reported to parents in the following categories: Above expectation, Meets expectation, Below expectation, and Well below expectation. Students in grades 3rd-8th will be graded on a 10-point grading scale. Grading will be as follows: 90-100=A 80-89=B 70-79=C 60-69=D Below 60=F *Grades will be rounded to the nearest whole number.

All students will receive gradelevel core instruction. Teachers will help students with individual goal-setting to empower students to develop a growth mindset. Students who require additional support in reading will receive remedial support from the reading specialist either within the classroom or as a brief pullout depending on the student's needs in addition to support from the classroom teacher. Remediation for math and other content areas will take place through the daily use of small group instruction. Students who are displaying difficulties with gradelevel performance will be referred to the MTSS team in order to analyze student data and performance and to provide the teacher with research-based strategies that support student learning. This process is an ongoing cycle of monitoring data and student performance and adjusting instruction to insure every student is successful.

Students who need acceleration will be provided differentiated activities that encourage them to stretch beyond grade level expectations or to dive deeper into units of study and project work. Middle school students will be encouraged to participate in academic competitions such as Math Counts and NC History Day at East Carolina University.

Family engagement is critical for student success. Teachers will be asked to provide strategies for families to utilize in supporting children's learning at home. This may take place through newsletters, information on teachers' websites, and curriculum nights at the school. Families will also be invited to curriculum sessions offered both during the day and at night that spotlight student projects and learning experiences in order to insure seamless connections to the learning that is taking place at school. The school website will include links to sites that will allow students to practice skills at home. Examples include ABCya.com, Kahn Academy, Funbrain.com, and Timeforkids.com. Because HCS reaches out to families across multiple communities, it is the goal of the staff to also provide curriculum nights in the various communities throughout the year to reach families who may be unable to travel to the school.

At the close of the regular school year, students at HCS will be provided

the opportunity to participate in summer remediation and enrichment camps. HCS will offer 5 weeks of half-day camps to support continued learning throughout the summer and reduce traditional summer slide.

6. *If you are proposing a high school, describe how the proposed charter school will meet the Future-Ready Core requirements. Provide details on how the students will earn credit hours and how grade-point averages will be calculated?*
7. *Provide a school academic calendar in Appendix C (minimum of 185 instructional days or 1,025 hours).*
8. *Describe in a brief narrative below on how the calendar coincides with the tenets of the proposed mission and education plan.*

Hobgood Charter School will follow a traditional calendar model broken into 6-weeks grading periods. According to G.S. 115C-84.2, the school calendar must provide instruction for a minimum of 1,025 hours. The school day will begin at 8:00am and will release at 3:00pm with instructional time accounting for 5.75 hours per day. The school will closely follow the traditional school calendar for surrounding counties. The calendar provided is a tentative schedule of the 2019-20 school year. The proposed school calendar meets the state-mandated requirement of 1,025 hours with a total of 1050 hours in 180 days providing for a 30-minute lunch and recess and 10 minutes of allotted transition time per day.

As stated previously, the calendar will reflect opportunities for scheduled parent conferences at the end of the first and fourth quarters. This provides parents and teachers an opportunity to discuss each student's progress after six weeks of instruction in both semesters while also providing for an additional opportunity at the end of the first semester, which may be utilized for parent conferences and/or parent training. Family engagement in student learning and progress is critical which is why parent education opportunities will be offered in a variety of settings and timeframes which will be determined once charter approval is granted.

The calendar also reflects consistent teacher workdays throughout the year to allow for continued professional development for instructional staff. These designated days are crucial to adhering to the plan for professional development and achieving high levels of success with implementation selected programs and instructional strategies.

Research indicates that students who come from economically disadvantaged homes often do not receive the same level of stimulation during breaks as those from more affluent homes. In order to minimize "summer slide" for students and to provide continued academic stimulation, students will have the opportunity to participate free of cost. Summer camp experiences will include opportunities such as Farm to Table Gardening, Cooking 101, Storybook Dragons, and Summertime STEAM, which will be facilitated by contracted instructional staff. Transportation services will be provided to insure all students have equitable opportunities to participate. Remediation efforts such as RtA summer reading camps will be correlated with summer enrichment camps. These opportunities will be scheduled June 15-18, June 22-25, July 6-9, July 13-16, and July 20-23.

Special Programs and "At-Risk" Students

1. *Describe the methods and clear systems of prevention and intervention teachers will utilize to provide assistance to students that are not performing at expected levels: ensuring continued progress and academic student growth.*

The goal of the instructional staff at HCS is to provide learning experiences in a way that draws on students natural curiosity and interests thereby ensuring student motivation, a main factor in student success. The instructional staff at HCS will utilize daily formative assessments to monitor and provide immediate feedback on student learning. Students may have quick response assessments such as an exit ticket or more in-depth formative assessments such as a response journal from which the teacher can draw observations of student misunderstanding. Teachers will use periodic assessments during projects with rubrics as part of this information. For more direct instructional approaches, if the majority of the class demonstrates misunderstanding, the teacher will reteach the content utilizing a different strategy from the original presentation. If only a small number of students demonstrate misunderstanding, the teacher will determine how student(s) might be best served to correct misunderstanding of content. Strategies for this type of immediate remediation and support are as follows:

-in-class small group instruction

in-class individualized instruction

-peer remediation

-online tutorials such as Kahn Academy

-push-in classroom support from the reading specialist

-home support by sharing the concern with the parent/guardian and providing strategies to support aligned methods at home

This will provide a clear, regular opportunity for teachers to assess and address student understanding and provide scaffolded and targeted instruction. Teachers will gather data from a variety of sources including a beginning of year assessment for baseline data as well as data throughout the year utilizing all assessments available to monitor progress.

If a teacher recognizes there are academic or behavioral challenges, he/she will refer the student to the MTSS team for recommended Tier 2/Tier 3 interventions. The MTSS team will be comprised of the school administrator, one teacher from each gradespan K-2, 3-5, and 6-8, the guidance counselor, special education teacher, the students parent(s), and the reading specialist as necessary. During this meeting the classroom teacher will share observations of student performance, interventions being utilized in the classroom, and data gathered based on the interventions used. The team will recommend 1-2 additional research-based strategies that the teacher will implement in the classroom and document student progress. Should these strategies prove successful, the teacher will continue to monitor the student within the normal scope of instruction. Should these strategies prove to be ineffective, the teacher will again request to meet with the team to review the data and determine if the student needs more intensive instructional strategies to be successful. The reading specialist or EC specialist may be called upon to provide support with Tier 3 interventions. If the learning difficulties continue beyond the normal scope of development, a DEC 1 referral will be made to determine if further evaluation is needed for specialized instruction.

In addition to focusing on individual student needs, the MTSS team will also analyze school-wide data on a monthly basis in order to inform total school instructional effectiveness and program planning.

Because family engagement is critical in ensuring student success, teachers will be in constant communication with families, especially when students are struggling. Teachers in grades K-8 will utilize the SeeSaw app to create digital portfolios of student learning. These portfolios may also be used to capture evidences of student difficulty in areas such as reading fluency. For example, although Reading 3D documents student difficulty, having a specific video of the child displaying the misunderstanding is very helpful as teachers work to explain the concern to families. Teachers will share such evidences and educate families on strategies.

2. *Explain how the instructional plan and curriculum will meet the needs of English Language Learner (ELL) students, including the following:*

- a) *Methods for identifying ELL students.*
- b) *Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for ELL students.*
- c) *Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services.*

1. **Methods for identification:** Hobgood Charter School is committed to ensuring ALL students have the resources and skills to demonstrate continuous progress and success. To address a potential language barrier, at the beginning of each school year or upon enrollment, families will be asked to complete a home-language survey. Information from this survey along with informal interviews with families at enrollment will assist our guidance counselor and EL teacher in notifying instructional staff there may be a need for greater linguistic support for students. During the first 30 days of enrollment, students whom we anticipate will need English Language support will be given the states EL screening assessment, either the W-APT Screener for K and 1st grade students or the WIDA Screener for 2nd grade and above. Parents and teachers will be provided the results of the screener so that a Language Acquisition Plan can be designed for the student with goals to quickly acquire both social and academic proficiency in English should the results be below the benchmark goal.

2. **Specific instructional programs, practices, and strategies:** Having mastery of a language other than English will be viewed as a strength to be built upon at Hobgood Charter School. HCS instructional staff will utilize a sheltered English instructional approach, allowing the EL student to remain in the classroom with specific scaffolding supports put in place by the regular classroom teacher and the EL instructor while utilizing supports from adopted curricula. In the regular classroom, students will receive the following research-based strategies that are supportive of language acquisition and academic achievement for our target population:

- * Explicit vocabulary instruction
- * Universal themes and meaning-based context (content related to personal lives and interests)
- * Guided interaction (students working together to analyze academic concepts)
- * Metacognition and authentic assessment (opportunities to reflect on thinking and articulate learning)
- * Nonlinguistic strategies including modeling, graphic organizers, and visuals

The students Language Acquisition Plan will state accommodations and modifications that must be implemented in the classroom and in testing situations for the student to be optimally successful.

3. Monitoring and evaluating: Each year, students identified as EL will be given the WIDA ACCESS test to determine progress in acquisition of the English language. For students who are not making adequate progress, a conference will be scheduled with the parents, teachers, guidance counselor, EL instructor and administrator to determine what additional services might need to be in place for the coming school year.

In order for a student to be deemed to no longer need more intensive supports as an EL student, he or she must score at the approved state level on the ACCESS exam. School staff will meet with families to discuss a student's ACCESS test results as well as overall student performance. Should the student's classroom performance indicate a continued need for supports, an updated Language Acquisition Plan will be written for the specific areas of need identified by the ACCESS results and teacher(s).

EL students, as all others, will have access to high-quality, learner-centered education that capitalizes on students' abilities to proficiently listen, speak, read, and write. EL students will be held to the same high standards as other learners and will be evaluated with assessments aligned to state standards while taking into consideration language acquisition stages and any identified modifications.

3. *Explain how the school will identify and meet the needs of intellectually gifted students, including the following:*

- a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*
- b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

Identification: All students at HCS will be instructed under the premise that each student embodies some form of giftedness. The instructional design for students at HCS is one that focuses first and foremost on providing students rigorous core instruction while integrating the opportunity to build upon their interests and strengths maximizing internal motivation to excel. As part of the educational program at HCS, students in grades 3rd, 5th, and 8th will take the Otis-Lennon School Ability Test (OLSAT), which is frequently used to identify giftedness. Results from this test along with students scoring a Level 5 on EOGs will support the instructional staff in identifying students that display academic giftedness. Students, including those in grades K-2, may also be identified by staff based on classroom performance. Students who transfer into HCS may also be identified based on records from their previous school.

1. Strategies to enhance abilities of intellectually gifted students:

All students will be instructed with the mindset that each student has areas of giftedness. It is the goal of HCS to hire at minimum one teacher with AIG certification to guide planning for students with identified giftedness who will also provide in-house professional development to instructional staff on strategies to support students with giftedness. Regular classroom instruction will focus on a strengths-based approach where students' giftedness is capitalized on in the regular classroom. By utilizing a workshop-based approach as well as other inquiry-based approaches, instructional practices lend themselves to personalized learning where

students will work at their maximum potential with constant teacher-scaffolding to insure optimal learning is taking place. As specific student strengths and giftedness are realized, instructional staff will differentiate instruction, allowing students to accelerate their learning through opportunities for independent or small group exploration of greater depth and rigor of content. Students will be provided opportunities to accelerate and deepen their learning through project-based learning and service learning. Students displaying advanced mathematical understanding in 7th grade will be encouraged to take Algebra I in the 8th grade. Students will be encouraged to participate in local and state academic competitions such as Math Counts, History Day, and the Science Olympiad.

2. Monitoring and evaluating: Students formally identified as being intellectually gifted will be monitored and evaluated using class performance standards and continued growth on state assessments. As students are formally identified, an AIG learning plan will be put in place to document and monitor student performance and growth over time with the input of the classroom teacher, AIG certified teacher, guidance counselor, parent/guardian(s), and school administrator. These plans will be reviewed and added at minimum annually.

Exceptional Children

*The public charter school cannot deny admission to any child eligible for special education services as identified under the federal legislation Individuals with Disabilities Education Improvement Act (IDEA), IDEA regulations, and Article 9 115C of the North Carolina General Statutes, North Carolina Policies Governing Services for Children with Disabilities. **All public schools are responsible for hiring licensed and 'highly qualified' special educators pursuant to law.** Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

Identification and Records

1. *Explain how you will identify students who are enrolled within the charter school that have previously been found to be eligible for special education services or are protected under Section 504 of the Rehabilitation Act.*
2. *Provide the process for identifying students who may be eligible for special education services as identified in the federal 'Child Find' mandate. Be sure to include how student evaluations and assessments will be completed.*
3. *Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed.*
 - a) *Requesting Records from previous schools*
 - b) *Record Confidentiality (on site)*
 - c) *Record Compliance (on site)*

1. In order to insure compliance with all federal regulations with regards to students with exceptional needs, HCS will employ a full-time EC specialist. When a student enrolls in HCS, a records request from the previous school will be made if the parent indicates on the enrollment form that the child previously received disability services. This will also help to identify any out-of-state or kindergarten students who received previous services. Upon receipt of the records, the records will be reviewed by the guidance counselor to determine if the child has an Individualized Education Program or 504 Plan. A search in CECAS will be conducted to obtain the EC records of an in-state transfer. The EC specialist will review the records

and immediately begin to implement the IEP or 504 Plan while at the same time scheduling a meeting with parents to addend the IEP or 504 Plan as needed based on current services provided at the school. If a particular service is not provided, HCS will contract with licensed providers to insure service delivery. The full range of service continuum will be offered utilizing the child's least restrictive environment as determined by the IEP team.

Should a legal guardian at any time share with staff at HCS that they suspect their child has a disability, the staff at HCS will assist them in putting the concern in writing upon which the 90-day timeline will begin to complete an evaluation.

2.If a guardian, teacher, or through the MTSS process indicates cause for suspicion that a child may have a disability, the school will schedule a DEC 1 meeting to discuss if further evaluations are needed to determine if the child has a disability and needs specialized instruction. If the team determines evaluations are needed, the school will obtain guardian permission to conduct the evaluations to make the determination for eligibility. A licensed psychologist and related services providers will then be contracted to complete the evaluations. Once a report with recommendations is received from the licensed service providers, the EC specialist, classroom teacher, administrator, and legal guardian(s) will meet to discuss the results of the testing and determine if the child is eligible for special education services and/or a 504 Plan. If the child is deemed eligible by the IEP team and specialized instruction is needed, an IEP will be written and implemented by the special education and regular education teachers. If only modifications and/or accommodations are needed, a 504 Plan will be written. Accommodations will be implemented throughout the year in the regular classroom setting including all forms of assessment. State assessments will only be given by a staff member who has been trained to administer the test. This may include but is not limited to the EC Specialist.

3.Records for all new students will be requested by the guidance counselor or EC Specialist from the agency in which the child was known to last receive services.

The following procedure will be followed to ensure that students' EC information remains confidential:

- 1.The records will be kept in a secure, fireproof file cabinet to ensure security and confidentiality of critical data and reports.
- 2.The EC folder is to be signed in and signed out to ensure that a folder can be located within fifteen minutes if it is not in the filing cabinet.
- 3.Only authorized individuals may check out confidential folders .
- 4.Folders checked out and removed from the secure area are to be returned by the end of the school day.
- 5.All confidential folder documents will be kept in the folder at all times. New documents added will be placed in the folder as soon as signed (if signature[s] necessary) or as soon as completed.

In order to insure compliance with all federal regulations, the EC Specialist and Lead Administrator will utilize the NC-DPI compliance checklist annually and correct as soon as possible by calling an IEP meeting.

Exceptional Children's Education Programming

1. *Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*

2. *Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*
3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
4. *Describe the proposed plan for providing related services.*

Hobgood Charter School's education plan is designed to meet the needs of every learner by creating a learner-centered environment where students' strengths are built upon. Students with disabilities will engage in the same curricular experiences as their peers in an inclusive model with differentiated instruction to insure the student has access to a free and appropriate public education provided in his/her least restrictive environment. In order to insure a free and appropriate education, the lead administrator and EC specialist will work with appropriate agencies to access equipment and service providers to insure that the full range of continuum of EC services is offered at HCS. A push-in model of support will be utilized so the EC Specialist works in the classroom alongside the regular education teacher as deemed necessary by the IEP. The EC Specialist and the regular classroom teacher will collaborate to determine barriers to learning and what strategies need to be put in place to differentiate the instruction in order to meet goals established in the IEP such as providing handouts and visual aids, breaking information into smaller steps, and peer coaching. Should it be determined by the IEP team that a student's needs warrant a smaller, more intensive setting, the student will work with the EC Specialist for identified periods of time in a separate classroom utilizing specially designed instruction to meet the individual students functional and academic needs.

It is the expectation that there will be ongoing conversation between the instructional staff in regards to student achievement with all students, and especially students with disabilities. It is imperative that the EC Specialist, classroom teacher, and any other contract service providers communicate to insure optimal learning will take place for students. The EC Specialist will be responsible for sharing IEP goals with the classroom teacher so there is a consistent understanding of the student's needs, goals, and accommodations.

In order for student success to be maximized, family engagement is critical. Each student will receive a progress report from the EC teacher noting progress on IEP goals to be included with the student's report card. Parents/legal guardians will be included in each step of an EC student's learning process. Student progress will be reviewed at each IEP team meeting to ensure there is progress on established goals.

Student Performance Standards

1. *Describe the student performance standards for the school as a whole.*
2. *Explain the use of any evaluation tool or assessment that the proposed charter school will use in addition to any state or federally mandated tests. Describe how this data will be used to drive instruction and improve the curriculum over time for the benefit of students.*
3. *Explain the policies and standards for promoting students, including students with special needs, from one grade level to the next. Discuss how and when promotion criteria will be communicated to parents and students.*
4. *Provide the public charter school's exit standards for graduating **ALL** students. These standards*

should set forth what students in the last grade served will know and be able to do. Be sure to include plans for the "At-Risk" population.

It is the expectation that students who attend Hobgood Charter School work to their maximum potential to ensure preparedness for future endeavors after graduation. It is also the expectation that the instructional staff at HCS work to engage and challenge every student to reach state, school, and personal goals set by the student. Although we recognize some students will face learning obstacles, it is the expectation that every student will demonstrate a year's growth with the ultimate goal of grade level proficiency on state assessments each year.

Teachers will work to develop formative assessments as well as unit and benchmark assessments to provide evidence of learning over time. Projects will be graded using rubrics developed in partnership by the students and the teacher. Each of these assessment forms will be analyzed and discussed regularly at data meetings held within each gradespan (vertical teams). Teachers will utilize the data and feedback from colleagues to determine next steps for students collectively and individually. Teachers will also utilize the SeeSaw app to maintain a digital learning portfolio that can be reviewed with students and parents as a means of setting learning goals for individual students. Teachers in grades K-3 will utilize Reading 3D as a tool to assess student growth in reading skills and comprehension. Kindergarten teachers will use the Kindergarten Entry Assessment to monitor development in the five domains of learning. All of this data will provide teachers with a plethora of information about each student thus allowing them to make informed decisions when planning instruction and remediation/acceleration, as necessary.

Students in grades K-8 will be promoted based on overall mastery of core content, classroom performance, 20 or fewer absences per school year, academic growth, and performance on state mandated tests. Teachers of students in grades K-2 will use information from Reading 3D and the K-2 State Math Assessment as part of the determination, but these assessments will not be the single determining factor of promotion or retention. Students in grades 3-8 will receive numerical grades based on a 10-point grading scale that will provide another data point to reference in the decision-making process.

Students who are not meeting the learning goals and expectations in the classroom at any time will be referred by the classroom teacher to the MTSS team for guidance on implementation of research-based interventions that will allow the teacher to monitor the student's progress. Any student, including those with disabilities, who are performing below gradelevel expectations at the end of the 4th grading period will be considered at-risk for retention. Parents will be notified throughout the year of the student's difficulty in meeting the established learning goals. The teacher will be expected to maintain ongoing communication through parent conferences, progress reports, and report cards at minimum. During the last month of the school year, any student who is recommended by the teacher for retention will be brought to the Promotion/Retention Advisory Team which will include the student's guardian for review of assessments, student work samples, and other data including records of attendance, IEP goal progress data, to determine if retention is the best option pending results from state assessments if applicable. Should retention be determined in the best interest of a student at HCS, parents/guardian will be notified in writing within 48 hours. If a parent disagrees with the recommendation by the Promotion/Retention Advisory Team to retain the student, the parent can request a review by the lead

administrator who has the ultimate authority to grade and place the student. The lead administrator has the final decision in this process and will notify the parent within 24 hours. HCS will also abide by all guidelines mandated by the NC Read to Achieve legislation in regards to 3rd grade promotion/retention. Students identified as English Language learners who are performing below grade level expectation will be promoted to the next grade provided they have received less than two years of EL instruction unless a case is presented by the classroom teacher that is determined to otherwise be in the best interest of the student.

Student Conduct:

*Provide a brief narrative that disseminates how student conduct will be governed at the proposed charter school and how this plan **aligns** with the overall mission and proposed Education Plan of the charter school.*

Be sure to include:

- 1. Practices the school will use to promote effective discipline.*
- 2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.*
- 3. An explanation of how the school will take into account the rights of students with disabilities in regards to these actions that may or must lead to suspension and expulsion.*
- 4. Policies and procedures disseminating due process rights, including grievance procedures, for when a student is suspended or expelled.*

1. Discipline will be proactively addressed through the Conscious Discipline framework which is a "multidisciplinary approach based on three distinct brain-body states in adults and children that drive behavior" including survival, emotional, and executive states. The framework addresses students social-emotional well-being and provides a common language for all students and staff. HCS will use Conscious Discipline to teach students how to self-regulate and handle conflict which will lead to more effective problem solving in social situations and decreased discipline referrals. Conflict will be viewed as an opportunity to teach appropriate behavior. Morning Meeting will be the designated time for explicit social skills instruction each day. Should a student display continuous difficulties with behavior, the teacher should enlist the support of the guidance counselor, MTSS team, and family to create a specific behavior plan for the student to provide specific attainable goals for the student and to provide a means for monitoring and tracking the students behavior. If deemed necessary, a functional behavior assessment can be conducted.

2. -Use, purchase, or sale of alcohol, controlled substance (as defined by state law), or illegal or counterfeit substance

-Fighting: The exchange of mutual aggressive contact between students, with or without injury. This does not include an act of self-defense.

-Sexual misconduct: To include offensive touching, sexual harassment, indecent exposure, consensual sexual activity, excessive display of affection -Weapons brought on campus including any dangerous object or substance that could cause harm or irritation to another individual or school property or at any school function

-Harrassment/Bullying/Cyberbullying: Any pattern of gestures or written, electronic, or verbal communication, or any physical act or any threatening communication that places a student or employee in actual and reasonable

fear of harm to his or her person or damage to his or her property; creates a hostile environment interfering with a students educational performance or by adversely altering the conditions of an employees employment

-Insubordination: Including but not limited to not complying with the direction or instruction of a staff member, walking away from a staff member while being spoken to, speaking to staff in an inappropriate manner, not completing assigned work

3. Students with disabilities will be taught behavioral strategies consistent with Conscious Discipline. Students with disabilities may also receive additional social skills instruction depending on goals in their IEP. The staff at HCS will comply with all federal regulations with regards to discipline for exceptional children. A students disability will be taken into consideration when incidences occur. Should a student reach the 10-day limit for suspensions, a Manifestation meeting will be held to determine if the behavior was a manifestation of the disability. If deemed so, the student will return to school in their prior placement, absences will be coded as excused, and compensatory services will be offered. If the behavior is not a manifestation of the disability and the suspension causes a change in placement, services will be contracted out to provide FAPE while the student is suspended from school. An EC student will only be placed on long-term suspension for the following infractions: possession of illegal or non-prescribed substances, possession of a weapon, and bodily injury that causes disfigurement. Homebound services will be contracted.

4. Should a student be suspended, the legal guardian(s) of the student have 10 days to petition the Board in writing for a hearing. Expulsion can be recommended by the Lead Administrator to the Board where a hearing will be held and legal guardian(s) will have an opportunity to plead the student's case. The Board will make the final decision, which cannot be contested.

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

NOTE: Please answer all sections completely. Do not use "same as LEA" or "whatever the law states". Lack of proper documentation could deem the application incomplete.

Governance:

School Governing Body:

*The nonprofit corporation must be officially authorized by the NC Secretary of State upon application submission.

Name of Private Nonprofit

:Hobgood Charter School *Mailing*

Address: 201 S Beech Street

City/State/Zip: Hobgood NC 27843

Street Address: 201 S Beech Street

Phone: 252-826-4116

Fax:

Name of registered agent and address:

Kelly Craft
1089 Edwards Fork Rd.
Scotland Neck, NC 27874

FEDERAL TAX ID: 83-2001956

Tax-Exempt Status 501 (c)(3)

The private nonprofit listed as the responsible organization for the proposed charter school has received 501 (c)(3) status:

Yes (copy of letter from federal government attached: Appendix D)
 No

NOTE: If the non-profit organization has yet to obtain the 501(c)(3) status, the tax-exempt status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date the Charter Application is given final approval.

Governance and Organizational Structure of School Governing Body:

The private nonprofit corporation is the legal entity that has responsibility for all aspects of the proposed charter school. Its members should reflect the ability to operate a charter school from both business and education perspectives.

Please complete the table provided depicting the founding members of the nonprofit organization.

Board	Board	County/State	Current	Past or Present	Has any disciplinary
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Member Name	Title	of Residence	Occupation	Professional Licenses(s) Held	action been taken against any of these professional licenses?
Juliana Harris	Chairperson	MARTIN	Vice Principal	Principal, B-K, Curriculum Specialist, Reading K12	
Nicole Flanary	Vice Chairperson	HALIFAX	Site Resource Coordinator		
Ron Elkins	Secretary	HALIFAX	Major Account Manager		
Lindsey Moore	Co-Treasurer	HALIFAX	CPA	North Carolina CPA	
Cara Archer	Co-Treasurer	EDGECOMBE	Finance	Masters Organizational Communication	
Zane B. Stillwell II	Member	WAKE	Consultant	MPA w/ Public Policy Certification	
Richard Cannon	Member	MARTIN	Farmer	NC Pesticide Applicator	
Joseph McDowell	Member	HALIFAX	Pharmacist		
Richard James	Member	MARTIN	Attorney	NC State Bar	
Gloria Jean Spruell Boyd	Member	MARTIN	Educator (retired)	NC Early Childhood, Reading 12, NC A+ facilitator	
Joyce Betts	Member	HALIFAX	Administrator, Families in Crisis (retired)		

Please provide the following in this location of the APPLICATION:

1. *A description of the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.*

The Board of Directors of Hobgood Charter School will be the governing organization charged with the responsibility of creating a mission, of hiring a Lead Administrator, of short-term and long-term strategic planning, and of setting and monitoring measurable goals as stated in the By-Laws. The Board will be responsible for ensuring that the school is in compliance with federal, state, and local laws. We will be diligent in assuring that there are no conflicts of interest. Elected officers of the

board include: Chairman, Vice Chairman, Secretary, and Treasurer. Board officers will be elected every year at the Annual Meeting. A current board member has been recruited to accept the role of Lead Administrator. The Administrator will make monthly reports to the board as the to progress made toward educational and financial goals. An end-of-year evaluation will be conducted to determine the success of the school and the administrator in accomplishing set goals. New goals for improvement will be set.

2. *Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board. Explain how this governance structure and composition will help ensure that a) the school will be an educational and operational success; b) the board will evaluate the success of the school and school leader; and c) there will be active and effective representation of key stakeholders, including parents.*

The Hobgood Charter School Board of Directors is comprised of eleven (11) members with a variety of skill sets. These skills include expertise in finance, accounting, marketing, business management, law, nonprofit management, fundraising, education, charter schools, education administration, curriculum, and community development. Six (6) of the board members are female and five (5) are male; two (2) are African American and nine (9) are Caucasian; and five (5) have children or grandchildren currently enrolled at Hobgood Academy while six (6) do not have children at this school. Ten (10) of the directors live in the three counties that comprise our targeted population and one (1) lives outside these counties. The duties of the Chairman include presiding at each meeting of the Board, presenting reports to the Board, and any other duties assigned by the Board of Directors. The Vice Chairman will perform the duties of the Chairman upon his/her absence and any other duties assigned by the Chairman. The Secretary will be required to take and maintain accurate minutes, see that all notices are posted in a timely manner, and any other duties assigned by the Chairman. The Treasurer will be responsible for all funds and securities of the Corporation, prepare or cause to be prepared a true statement of the Corporations assets and liabilities, while ensuring that all tax information is presented in an accurate and timely manner. This well-balanced Board is well equipped to ensure and effective, innovative educational model and a successful business model. The board will evaluate the school and the lead administrator by examining students academic proficiency and growth; by parent, student, and staff satisfaction surveys; and physical and emotional health by studying daily absences and disciplinary referrals. The Board will work closely with our Parent-Teacher organization, Advisory Board, and with community leaders to be sure that all members of our student body are successful.

3. *Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?*

Two (2) of the founding board members were on the 2017-2018 Board of Directors. The nine (9) additional members were recruited based on their expertise in the fields of education, charter schools, finance, business management, marketing, and community organization as well as their commitment to running a successful charter school in Hobgood. One of our Directors will transition into our Lead Administrator leaving an opening on the Board. The Board will then assess our strengths and weaknesses to determine what to look for in a new member, who we hope will be in place by our Annual Meeting in July. When a Board member determines that he/she will

not be able to serve his/her full term, the Board will require a 30-day notice to allow the Board to find an adequate replacement.

4. Outline below the strategic board calendar detailing how often the board will meet according to the bylaws established.

The Hobgood Charter School Board of Directors will meet monthly on the third Monday of each month at 7pm to monitor the school operations. An Annual Meeting will be held in July of each year for election of officers, for evaluation of performance goals, and for strategic planning.

5. What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.

The Board of Hobgood Charter School will develop a handbook to assist in the orientation of all Board members. An orientation of new Board members will be held at the July Annual Meeting each year. Members of the 2018-2019 Board of Directors will attend the Charter School Governance session of the RTO sponsored by NCDPI on September 26, the Charter School Leadership Institute in Holly Springs on October 18, all other RTO workshops including Charter School Finance, Operations and Accountability, and Meeting the Needs of All Students. Additional opportunities for Board development include workshops "A Framework Understanding Poverty," "A Conscious Discipline Approach," and "Building Community" and a tour of a Team CFA charter school. Members will be required to participate in at least three Board development opportunities each year.

6. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Conflicts of Interest as well as perceived Conflicts of Interest must be carefully avoided at Hobgood Charter School. Any state and federal laws will be carefully followed. As stated in Section 4 of our By-Laws, no member of the Board shall discuss or vote on a matter that is likely to advance a pecuniary of the member at the expense of the Corporation. All nominated board members must sign a letter there is no matter known that is likely to cause a Conflict of Interest between the member and the Corporation. If a matter comes before the Board that has the potential to become a Conflict of Interest or the appearance of a Conflict of Interest, the Board shall prohibit the matter from going forward unless the following conditions are met.

- i. The matter is fully disclosed at an open meeting of the Board;
- ii. The affected parties are present at the meeting;
- iii. After a full review of the matter the Board determines that it will clearly promote the purposes of the Corporation to allow the matter to go forward; and
- iv. The Board votes unanimously to allow the matter to go forward.

If any existing relationship exists that could cause actual or perceived conflicts, it should be declared to the Board in an open meeting and a vote shall be taken to determine how the issue will be resolved. The Board action is final.

7. Explain the decision-making processes the board will use to develop school policies.

Hobgood Charter School Board of Directors will ensure that all

policies adopted by the Board will be in accordance with the North Carolina Laws for Charter Schools. The Board has retained legal counsel to review proposed policies for compliance. It will be the function of the Board to adopt policies of vision, goal setting, student admissions, teacher licensure, charter renewal, and board screening. It will be the duty of the Lead Administrator and key members of his/her team to draft policies for the day-to-day operation of the school which will be in the Student Handbook and the Faculty Handbook each year. These policies can be updated as needed based on how well they worked the previous year. The Board will vote on these policies at the beginning of the school year and the implementation will be carried out by the Lead Administrator and his/her team.

When deliberating policies, the Board will gather data concerning financial impact, differing perspectives, how stakeholders will be affected, and any other relevant data. The Board may ask the Lead Administrator and any relevant committee to come and discuss policy recommendations. Once all points have been discussed, the Board will begin deliberation. In the deliberation the Board will seek to build consensus, taking all viewpoints into consideration. Once the Board votes to approve or reject a policy, the entire Board will support the decision.

8. Describe any advisory bodies, councils, or associations listed in the organization chart or to be formed, including the roles and duties of that body, and the reporting structure as it relates to the school's governing body and leadership.

The Board of Directors, in support of our mission, will establish a School Improvement Team composed of community leaders, teachers, and parents. The purpose of this team is to provide the Board and Lead Administrator ideas and insight that will help Hobgood Charter School meet its goals and prepare for the future. They will help to provide a diverse frame of reference and work to enhance community outreach. This team will be appointed cooperatively by the Board and Lead Administrator. The team has no direct authority and report directly to the Board.

A Parent-Teacher organization will be organized to provide support to the school and Lead Administrator through organizing activities such as fundraisers, community events, volunteering, and mentoring new families. They will have no authority and must obtain approval from the Lead Administrator for proposed projects.

9. Discuss the school's grievance process for parents and staff members.

The procedures for parent and employee grievance and/or termination are simple and straightforward.

1) The aggrieved party will talk with the Lead Administrator in an attempt to resolve the issue. If this involves an EC student, the EC teacher will be included.

2) If the issue remains unresolved, the parent/employee will have 10 days to file a formal, written grievance complaint with the Board of Directors.

3) The Board will meet with the parent/employee to discuss and attempt to resolve the issue.

4) Any decision of the Board is final, with no appeal.

Governance and Organizational Structure of School Governing Body (continued)

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the

parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix E)

2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix F).
3. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix G).

Proposed Management Organization (Educational Management Organization or Charter Management Organization)

If the proposed school does not intend to contract with an education service provider, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Private School Conversions: *complete ONLY if the proposed charter is a private school conversion. Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

Not Applicable

1. Describe the rationale for converting from a private entity to a public school. Include information regarding how the proposed charter school will be nonsectarian in nature and will be open for all students (not just those currently attending the private school).

Hobgood Academy is no longer able to meet the needs of this community as a tuition-based private school. This school was founded in a time when the community was more economically stable. Family farms and textile mills were numerous. Today, many families struggle to put food on the table and pay utility bills. They cannot afford to send their children to a private school. Hobgood Academy has prepared thousands of students to excel in college, careers, and beyond. It is our desire to extend this legacy and prepare thousands more as an innovative, free, public charter school committed to excellence and to all scholars. A successful public charter school is the only chance for this region to make an economic and educational recovery. Hobgood Charter School will be nonsectarian in nature and will be able to provide choice for all scholars regardless of their parents income, race, religion, or address. As North Carolina Charter School Law requires, students will be accepted on a lottery system. Current students at Hobgood Academy will have no greater chance of acceptance than those not enrolled here.

2. Provide a detailed description of the existing private school's financial status, including the process in which these financial assets or deficits will be transferred to the non-profit organization. Provide a copy of the organization's IRS Form 990 for the last three years as Appendix N. If the current organization does not have a FORM 990, tax information for the last three years along with financial statements must be included as Appendix N.

Hobgood Academy has sold its real property to the Julia Carr Family Trust and the new owners will receive the deed in January 2019 when the final payment is made. All contents remain the property of Hobgood Academy and will be transferred to Hobgood Charter School on July 1, 2019. Hobgood Academy is currently operating with a positive cash flow. Employee contracts expire in June and faculty is encouraged to apply to Hobgood Charter School. No debt will be transferred from Hobgood Academy to

Hobgood Charter School. The most recent FORM 990s are attached.

3. *Depict and analyze the current enrollment trends and student demographics of the private school over the past three academic years.*

Hobgood Academy showed a significant decline in enrollment from 2010 to 2015, however the past three years have shown a slow, but steady growth. We believe this is due to Opportunity Scholarships received by students who have chosen Hobgood Academy. Unfortunately, not all those who visited and applied for the scholarships received them. While the majority of our students are Caucasian, we have been successful in recruiting more minority students. Tuition remains a barrier for many students. Fifty percent of our students receive some type of tuition assistance. We currently have 4 students that are in foster care. Feedback from our community meetings suggest that as a free, public charter school our numbers would more closely reflect our community which is 49% African American, 46% Caucasian, and 5% Hispanic.

	2018-2019	2017-2018	2016-2017
Caucasian	87	69	70
African American	7	9	4
Hispanic	4	4	4
TOTAL ENROLLEMENT	98	82	78

4. *Document and expound upon evidence that the existing private school is successful in student achievement. Base this explanation upon academic data available through state and national summative assessments.*

Hobgood Academy graduates have gone on to be doctors, lawyers, administrators, pharmacists, plumbers, farmers, teachers, and pastors. We deem that a success. Hobgood Academy also relies on testing data from the Stanford Achievement Test, a standardized test that measures students in a national comparison. The most recent scores are shown in a chart below. While the 8th grade is low, we believe the overall scores indicate a successful school.

Percentile score	READING	MATHEMATICS
3rd Grade	64%	88%
4th Grade	57%	64%
5th Grade	76%	72%
6thGrade	86%	73%
7th Grade	74%	67%
8th Grade	41%	29%

5. *Explain the process by which the current private school staff will be considered for teaching at the proposed charter school staff. What is the projected turnover due to the statutory requirements for teacher licensure and highly qualified status?*

Hobgood Academy has 7 full time elementary and middle school teachers, all of whom are licensed. All current staff will be encouraged to apply at Hobgood Charter School, though we expect to lose one or two. The Board of Directors will hold conferences with each teacher to discuss annual performance evaluations from the teachers portfolio, to share the new focus, vision, and expectations for Hobgood Charter School to determine if he/she would be likely to excel under the new education plan. Since one of our Board members will transition to Lead Administrator, his/her input would be highly valued.

Charter School Replication: *complete ONLY if the proposed charter is a replication of an existing charter school. Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.*

Understand that the replication means that a new charter school will be governed separately from the charter school the application is modeled after.

X Not Applicable

Projected Staff:

Below, please outline a list of positions anticipated for the charter school (e.g., principal/director, finance officer, administrative support staff, teachers (part-time and full-time), paraprofessionals/teaching assistants, clerical, and maintenance). Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings and align with the proposed budget.

1 Lead Administrator (Principal)
1 Custodian
2 Bus Drivers
3 Teacher Assistants
1 Counselor/Testing Coordinator
1 Financial Manager
1 Media and Technology Specialist
9 Regular Classroom Teachers
4 Electives/Specialty Teachers to include PE (Full-time), Art (Part-time), Music (Part-time), Foreign Language (Part-time)
1 Exceptional Children's Teacher (Full-time)
1 EL Teacher (Part-time)
1 Reading Specialist

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

1. *Explain the board's strategy for recruiting and retaining high-performing teachers.*

Our mission will remain at the forefront as decisions are made in recruiting, hiring, and retaining high-performing teachers. The faculty and staff is the backbone of any excellent school. Job opportunities will be advertised through social media, Internet websites, job fairs, Teach for America, and other mediums. Positions will remain advertised for a minimum of 10 days in order to insure equitable opportunities for prospective employees. Recruitment efforts will focus on but are not limited to graduates from East Carolina University, Elizabeth City State University, North Carolina Wesleyan College, and Meredith College along with networking through alumni of Hobgood Academy and board members in order to secure high-quality instructional staff. HCS also seeks to employ a staff that reflects the demographics of the student population and communities served.

The next step to insure high-quality, seamless instructional practices and continuity of services is to focus on teacher retention. The Lead Administrator will create a supportive environment for instructional staff to grow and expand their teaching methods through frequent dialogue and constructive feedback regarding instructional practices, establishing a climate of professionalism where innovation is encouraged and support is

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provided when new ideas are implemented, and instructional staff are engaged in meaningful professional development opportunities that meet the strategic goals of the school but also focus on teacher interest and need including regular PLCs where teachers have opportunities to discuss challenges, celebrate accomplishments, analyze data, and plan collaboratively. The Lead Administrator will provide support with student discipline to insure classroom instruction is minimally interrupted. Evidence of a supportive environment for HCS will be evidenced by teacher retention rates, NC Teacher Working Conditions Survey results, parent surveys, and positive student enrollment.

2. *Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.*

The Board of Directors will work closely with the Lead Administrator. The Lead Administrator will be responsible for interviewing, completing background checks, and securing references on prospective employees, then making recommendations to the Board for hiring. The Lead Administrator will develop a committee, which may consist of 1 or more board members and eventually school staff to assist with these interviews. If an urgent circumstance arises causing the Lead Administrator to believe a staff member may have grounds for termination, that will be brought to the Board for immediate consideration. The Lead Administrator will be responsible for staff evaluations, and staff who are consistently performing below standard will also be considered for an action plan which may lead to termination should the staff member not demonstrate improvement. The Lead Administrator will handle all the day-to-day operations of the school. The Board will be kept up to date through informal interactions and a monthly report from the Lead Administrator during regularly scheduled board meetings. A teacher representative will also be invited to each board meeting to share successes and concerns. The Board, Lead Administrator and staff will all be accountable for achieving the mission and goals for Hobgood Charter School.

It is the goal of the Board to be involved in school events including spending time in the school and classrooms periodically as a way of demonstrating support and understanding of the school in which they are governing. Should staff members have concerns they wish to share with the Board, the Board will request that the employee share the concern with the lead administrator first and recommend they follow the grievance process or utilize the School Improvement Team to promote ideas of support and/or resolution.

4. *Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.*

The Lead Administrator will be tasked with recruiting, interviewing, and making recommendations to the Board for hire. The Lead Administrator will seek highly qualified staff members who embrace the mission and educational plan of Hobgood Charter School. Potential employees should be intelligent, compassionate, moral, motivated, and eager for a challenge. Each candidate will submit an application including a letter of interest, resume, and three references. The application will be reviewed by the Lead Administrator and those targeted to move forward in the hiring process will be scheduled for an interview with an interview committee consisting of the Lead Administrator, a board member, and additional staff after initial hiring has taken place. Once a potential candidate has been selected, a

national background check will be run, references will be checked, and the Lead Administrator will then make a recommendation to the Board for hiring the applicant. Applications and interview forms will remain on file in the Lead Administrators office.

The process for dismissing school personnel will be similar. The Lead Administrator is responsible for evaluating all staff. Employment is at-will. If a teacher fails to perform to expectation, the Board will be notified and an action plan for improvement will be developed to give the teacher guidelines and tools to help him/her succeed. If this process is unsuccessful, the Lead Administrator will recommend nonrenewal of the contract. If illegal behavior such as negligence or sexual harrassment, occurs, the Lead Administrator will notify the Board immediately and appropriate action will be taken to further investigate the allegation. Should substantial evidence of wrongdoing be present, the Board will determine appropriate action up to and/or including termination. All disciplinary actions will be accompanied by a letter from the lead administrator to the employee with a copy being placed in the employee personnel file.

5. *Outline the school's proposed salary range and employment benefits for all levels of employment.*

Lead Administrator (Principal) \$60,000 to \$75,000

Custodians \$18,500 to \$26,500 (Hourly)

Bus Drivers

Counselor/Testing Coordinator \$35,000 to \$45,000

Financial Manager \$30,000 to \$40,000

Media and Technology Specialist \$35,000 to \$45,000

Core Content Teachers \$35,000 to \$45,000

Electives/Specialty Teachers \$35,000 to \$45,000

Exceptional Children Teacher \$35,000 to \$45,000

Reading Specialist \$35,000 to \$45,000

All Full-time non-contract employees will be eligible for state health insurance and retirement through the TIA 401K plan.

6. *Provide the procedures for handling employee grievances and/or termination.*

The procedures for employee grievance and/or termination are simple and straightforward.

1) The aggrieved employee will talk with the Lead Administrator in an attempt to resolve the issue.

2) If the issue remains unresolved the employee will have 10 days to file a formal, written grievance complaint with the Board of Directors.

3) The Board will meet with the employee to discuss and attempt to resolve the issue.

4) All employees serve at will and any decision by the Board is final, with no appeal.

7. *Identify any positions that will have dual responsibilities (within or without the organization) and the funding source for each position.*

We anticipate having our Teacher Assistants hired dually as our bus drivers.

8. *Describe the plans to have qualified staffing adequate for the anticipated special needs population, means for providing qualified staffing for ELL and gifted students.*

The staffing plan includes hiring 1 full-time EC Specialist for the first year based upon state regulations for caseloads and school enrollment numbers. Hiring for this position will entail ensuring a 4-year degree and Master's with appropriate certifications in place including General Curriculum K-12 and middle school certifications. 3+ years of experience is

preferred for this position. Should additional certifications be needed, we will work with the employee to acquire those certifications or seek to hire another specialist with the necessary certifications. We seek to hire a part-time licensed TESOL teacher to support EL learners. It is also our goal to hire at least 1 classroom teacher with AIG certification to guide the instructional staff in planning for students deemed academically and/or intellectually gifted. After the initial year of HCS, if there are adequate number of students to warrant hiring a full-time AIG instructor, we will seek to do so.

9. *Provide a narrative detailing the roles and responsibilities, qualifications and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).*

Staff Qualifications include the following:

Professional Staff

The Lead Administrator will possess teaching and administrative licensure from the State of North Carolina.

Responsibilities of the Lead Administrator will include:

- Oversight of all curriculum and school programming
- Direct reporting to the Board of Directors
- Manage staff and the day-to-day operations of the school
- Monitor the school's financial position, student performance goals, operations, and staff performance
- Implement initiatives to support the mission and culture of the school
- Ensure student and staff safety
- Develop a strategic plan annually to present to the Board of Directors
- Recruit and retain staff who are effective and are invested in the school's mission and culture
- Comply with all NC charter and public school laws and requirements

Full and part-time teachers including the Reading Specialist will possess the following minimum teaching credentials:

Bachelor of Arts or Science for no less than 50% of the instructional staff
Certification appropriate to the grade level/content being taught is preferred (Elementary, Middle Grades, Exceptional Children, ELL)

Every effort will be made to ensure that the faculty reflects at each grade span (K-5, 6-8) a range of cohorts and teaching experience so that staff strengths can be maximized.

Responsibilities of teachers include:

- Support the mission and vision of the HCS educational plan
- Create positive learning community
- Actively seek to achieve school-wide and state mandated student performance goals
- Attend regular professional development opportunities
- Provide feedback to students related to classroom performance
- Develop and implement lessons and projects that are engaging to students and lead to mastery of content
- Utilize instructional strategies that support the learning of all students
- Provide ongoing communication with parents/guardians of students

The Counselor/Testing Coordinator will possess teaching and/or guidance licensure or a 4-year degree in social work or related field. Responsibilities include:

- Assess individual student need for counseling/assistance
- Provide monthly character education lessons in classrooms
- Communicate with parents, teachers and administrator on matters of social

health

- Maintain case files and reports to track student outcomes
- Acquire required testing certifications
- Manage test preparation and oversight of standardized testing as required by state guidelines including proctor training

Media and Technology Specialist will possess a minimum of two years post high school education and/or commensurate experience in skill development through prior employment in a technology-related profession. Responsibilities include:

- Maintain technology equipment throughout the school
- Provide tech support to school staff
- Teach technology-related electives for middle school students
- Take the lead on installation and implementation of technology-based programs

Support Staff:

Financial Manager:

A minimum of two years post high school education and/or commensurate experience in skill development through prior employment as a school office employee.

Responsibilities include:

- Maintain financial records and work with CPA to file appropriate paperwork and answer any questions
- Process payroll
- Create monthly financial snapshots for Lead Administrator and Board of Directors
- Manage Accounts Payable/Accounts Receivable, deposits, and work with appropriate vendors
- Publish reports, records, and other data related to school's finances and operations
- Maintain inventory on necessary supplies and place orders when needed.

Custodial:

-A minimum requirement of a high school education or equivalent and/or commensurate work experience in upkeep of a business or similar facility.

Staff Evaluation and Professional Development

1. *Identify the positions responsible for maintaining teacher licensure requirements and professional development.*

HCSs lead administrator will be responsible for maintaining records of professional development and working with teachers to support the acquisition of appropriate number of renewal credits for licensure renewal at the end of each renewal cycle.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission and educational program. Plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state law and the Every Child Succeeds Act. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

Mentoring teachers will be a key strategy for the success of the school. As with any change, the conversion from private to charter brings about a shift in the normalcy for staff who may be hired to transition from private to charter employees. Bringing new staff in also provides a shift in dynamics. It will be critical for the lead administrator to set the tone that collectively, the staff is embarking on a new journey together and that everyone has strengths that will be capitalized on and will have places to grow. Building a sense of community will be crucial in the change process

as well as helping the staff understand that small steps are great steps if they are in sync together. The lead administrator must maintain a solid pulse on staff dynamics to insure solidarity and cohesiveness and will actively work with the board, the community, and parents to provide opportunities for staff to be recognized for their efforts.

Hobgood Charter School will follow the guidelines of the NC State Board of Education policy ID number TCP-C-004 for the NC Teacher Evaluation Process. Instructional staff will be evaluated using the North Carolina Professional Teaching Standards to determine an overall effectiveness rating. At the beginning of each school year or upon hire, teachers will be provided an orientation to the NC-EES process, will complete a self-assessment, followed by developing a Professional Development Plan setting goals for their professional growth for the year. Teachers will be encouraged to focus their plans on developing expertise in strategies such as conferring with students and/or parents, project-based learning, or nonlinguistic representations that support the curricula and overall mission of the school. The lead administrator will conduct up to 3 observations each year based upon the renewal cycle of the teacher. Teachers will be evaluated under the Comprehensive, Standard, or Abbreviated observation cycle. Teachers who have more than 3 consecutive years of successful teaching experience will be evaluated under the Abbreviated or Standard evaluation cycles. During a teacher's license renewal year, the administrator will complete 3 classroom observations that include all 5 standards of performance. The teacher will receive a summary rating in these standards. In an Abbreviated cycle, the administrator will complete 2 classroom observations that are either formal or informal in nature. The teacher will receive a Summary rating on Standards I and IV of the evaluation tool.

Should a teacher not demonstrate proficiency in any areas of the evaluation, the administrator may place the teacher on an action plan to provide a pathway in which the teacher can improve performance. The administrator will monitor the teacher closely and provide a staff member to assist in mentoring and observing the teacher to provide continuous guidance for improvement.

Beyond formal observations, the lead administrator will spend time in each classroom regularly through informal observations such as walk-throughs where feedback is offered through a quick note, follow-up email, or conversation. Spending quality time in classrooms is a premier strategy for the administrator to monitor that curricular goals are being met, that classroom climate is conducive to learning, and provides an opportunity for the administrator to build meaningful relationships with students and staff. The lead administrator will also mentor teachers through weekly PLC meetings to guide teachers with data analysis and planning.

Any teacher that has 3 or fewer consecutive years of teaching will be evaluated on the Comprehensive cycle and will receive an overall summary rating on each standard. Any teacher in this category must also participate in the Beginning Teacher Support Program as outlined by the NC State Board of Education Policy TCP-A-004. Staff selected as mentors will be trained through the Homebase course "The 21st Century Mentoring Module."

- 3. Describe the core components of professional development plan and how these components will support effective implementation of the educational program. Describe the extent to which professional development will be conducted internally or externally and will be individualized or uniform.*

1) Upon hire, instructional manuals and Internet sites will be made available to teachers to preview and become familiar with prior to formal professional development. During opening teacher workdays, consultants will be contracted for 1-day face-to-face or virtual trainings for the following initiatives:

-Conscious Discipline (total staff) 1 day

-Units of Study Workshop Model (instructional staff K-8) 1 day

-Investigations (K-5) and Open Up Resources 6-8 Math 1 day

Follow-up PD for these components will be scheduled on workdays throughout the year. Each of these initiatives offer pre-recorded online webinars will be viewed during weekly PLCs to insure ongoing conversation related to implementation and for problem-solving as concerns arise.

2) On the first required teacher workday in September, HCS staff will engage in a 1-day diversity training, which will be followed by a book study on Ruby Paynes Framework for Understanding Poverty. Teachers will meet in gradespan groups during PLCs and during staff meetings to discuss implications for working with students.

3) PD will also take place during scheduled staff meetings throughout the year. PD with Action for Healthy Kids to develop the school's wellness program will take place with our rep, Brittany Ledford from Cary, NC. A representative from ECU's School of Health and Human Performance will provide onsite training for teachers in grades K-8 on Energizers demonstrating how to integrate content with brain breaks. The administrator may also designate staff with expertise in particular areas to provide brief sessions, as well.

4) Collaborative Coaching will be a facet of the professional development model at HCS. Teachers will work in teams to record, review, and debrief lesson implementation to provide feedback on practices.

5) Teacher observation both onsite and at other sites including a Core Knowledge school.

6) Attendance at professional conferences will be encouraged as finances allow.

4. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be covered during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods.

During the initial workdays of the school year, staff at all levels will be involved in a variety of professional development endeavors to ensure a common understanding from which learning will take place.

August 12th: Opening Staff Meeting to include NC-EES orientation and review of staff handbook; Community-building activities to set the stage for positive staff interactions and collaboration; Setting the Stage for a Family-Friendly School will be an afternoon session facilitated by the lead administrator focusing on creating a family-friendly school environment.

August 13th-15th : 1-day onsite trainings facilitated by contracted consultants for the following:

-Conscious Discipline will be required for the entire school staff in order to provide a common language and baseline for expected practices within the school and an understanding of brain states as related to students social-emotional health, development, and approaches to discipline. Teachers will receive guidance on developing a Safe Place in classrooms and be introduced to calming techniques to support self-regulation for students.

-Units of Study Workshop Quick-Start will be held for all instructional

staff as literacy is taught across the curriculum. Teachers will gain an understanding of the workshop model, observing and conferring with students, and will work with consultants to unpack introductory lessons for the beginning of the year. Specialists will focus on developing plans for integration of literacy in their specialty areas.

- Investigations (K-5) and Open Up Resources 6-8 Math will be held separately for each respective gradespan. Specialists will select one of the trainings to attend according to the area they feel they could most benefit from learning more. Teachers will develop and deepen their math and pedagogical content knowledge, focus on engaging students in mathematical discourse, and begin unpacking initial lessons in preparation for the opening of school.

Because the staff may or may not be familiar with the designated curricula for HCS, it is anticipated that there will be moments of challenge in the implementation phase. Teachers will have opportunities to plan and problem-solve collaboratively during weekly PLCs, engage in collaborative coaching once a sense of trust is established among colleagues, and each of these areas will continue to be addressed and expanded upon as the year progresses. It is understood that all of these endeavors take time to practice, refine, and personalize so the practices become inherent.

Although project-based learning will be a focused learning approach, it is imperative that the instructional staff has a solid foundation with the core curriculum and instructional practices embedded. The professional development on these curricula will provide a springboard for project-based learning once instruction has begun and teachers feel secure in their daily routines. The prospective lead administrator has experience project-based learning and will begin to introduce the framework for this approach gradually as staff demonstrate they are comfortable with adding another level to their instructional practices.

5. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan.

On the initial workday, staff will participate in a 2.5 hour session on Setting the Stage for a Family-Friendly School as well as NC-EES orientation and Bloodborne Pathogens training. During the following initial workdays of the school year, three 7-hour professional development sessions will be required for all instructional staff including 1 session on Conscious Discipline, 1 session on the Units of Study Workshop Approach, 1 session for grades K-5 on Investigations 3, and 1 session for grades 6-8 on Open Up Resources 6-8. Teachers will receive 7 hours of credit for diversity training held on the September 13th workday. During the remainder of the school year, half of each workday (3.5 hours) will be used for continued professional development (17.5 hours) as follow-up from initial core training or related areas such as formative assessment, inquiry and project-based learning, diversity, fostering student health, and the effects of childhood trauma. Teachers will be required to attend one monthly staff meeting and one professional development opportunity after school from 3:00-4:30 (30 hours). During this time, the administrator, guest speaker, or designated staff member will provide professional development related to the areas designated previously. Opportunities to debrief from coaching and observation experiences will take place either during planning time, PLCs, or briefly

after school.

Teachers will be provided time to observe other teachers in the building at least twice per year (2+ hours). A schedule will be determined, and if the observation does not take place during a planning period, the administrator will be responsible for finding coverage by another staff member. Should a teacher or group of teachers need to be away from school for a professional development opportunity, the school has budgeted funds to pay for substitutes to cover this expenditure. It is anticipated that each staff member will be provided with an opportunity for a minimum of 75 onsite hours of professional development each year. Teachers will be encouraged to pursue content-specific online professional development through offerings in CANVAS as well as administrator-approved independent studies.

Teachers will have designated planning time each day while students are at specialty classes (PE, art, music, media). During this time, once per week, teachers will meet by grade-span in PLC meeting to discuss data and assessments to support continued student achievement.

Enrollment and Marketing:

Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions G.S. 115C.218.45 carefully.

Marketing Plan

Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-218.45(e)).

As stated in our admissions policy, we will not discriminate against any student or limit admission based on intellectual ability, measures of achievement or aptitude, athletic ability, race, religion, national or ethnic origin, color, age, military service, disability, or gender, except where exemption is appropriate .AND allowed by law.

According to the 2010 US Census Data, the 27843 (Hobgood) zip code racial/ethnic makeup is 5% Hispanic or Latino, 45% White, 49% Black or African American. Of families with school aged children, 46% have annual incomes below the poverty level. To be clear, the Hobgood Charter School Board expects the enrollment to reflect both the racial/ethnic and economic composition of the community. All marketing efforts will be directed to meet these expectations. A weighted lottery will also help to ensure that 50% of our open seats during the lottery will go to students who qualify for free lunch under the federal school lunch program.

The key to fiscal success is full enrollment. The Board will monitor enrollment and marketing efficacy. The Board will authorize the Marketing Committee to implement the Marketing Action Plan. If marketing efforts do not result in full enrollment, recommendations for additional strategies and resources to implement these actions must be presented to the board. The following are highlights of the Action Plan throughout critical stages:

(Initial Application Process)

Marketing efforts have been made in the past two years. School personnel,

board members, and parents have held informational meetings in various public and private locations throughout our communities to share our mission and plans for converting to a Public Charter School. We are planning for the upcoming fall activities and developing marketing materials.

(Selection Process and Preliminary Planning Period)

Initial marketing materials will be updated as needed. Distribution of said marketing materials will begin during the fall and winter activities. Requests for information and materials will be logged. The schools website will have periodic updates regarding the Charter School progress. Potential volunteers for the public lottery will be identified and approached. Upon CSAB approval for acceleration, applications will be prepositioned in the community and applications requests will be prepared for mailing. Volunteers for the Lottery will be notified of the CSAB approval and planning will begin for the open enrollment Open House(s).

(Final Approval, Student Enrollment, and Planning Period)

Upon final SBE approval, dates for the initial open enrollment period and public lottery dates will be set. Communications will be immediately sent to pre-identified partners and locations to begin distribution of applications and posting of open enrollment dates. Arrangements for open enrollment and public lottery activities will be finalized. The Annual Seafood Festival will be held. Results of the open enrollment will be communicated to the Board. If needed, a public lottery will be held and results announced. If open seats remain, additional marketing will be authorized in an attempt to fill the seats.

(First 20 Days of School)

A ribbon cutting ceremony will be held to celebrate the first day of Hobgood Charter School. The Board will be given updates of actual attendance vs. enrollment. Focused marketing will continue if unfilled seats remain.

(First Semester of School)

Evaluate the effectiveness of marketing plan and revise strategies for 2020-2021 school year if needed. Begin planning for returning students, open enrollment, and lottery.

(Open Enrollment Period 2020-2021)

Open enrollment will be from 01-08-20 to 02-15-20. The public lottery will be held within 30 days of 02-15-20.

(Final Plans/expansion year 2)

Results of the Open Enrollment and Lottery will be evaluated for 2nd year marketing strategies.

Parent and Community Involvement

- 1. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.*
- 2. Describe how you will engage parents in the life of the public charter school. Explain the plan for building engaging partnerships between the family and school that strengthen support for student learning.*

1. Hobgood Charter School has begun the process of engaging parents and community members in the proposed conversion from Hobgood Academy to Hobgood Charter School through a series of informational meetings in the three counties we serve. These meetings have included the Hobgood Depot, the Tarboro Coffee Shop, Woodman of the World in Oak City, Scotland Neck Crepe Myrtle Festival, Hobgood United Methodist Church, Gold Point Church of Christ, Hobgood Academy and in various private homes. We have a website and

Facebook pages through which we communicate, as well as a ONE CALL telephone service. When we receive approval for Hobgood Charter School, we will begin another round of community meetings to answer questions and gather additional contact information from all interested family and friends. These prospective families will be invited to attend special events currently scheduled for this year including athletic events, field day, and Grandparents & Grandfriends Day. We have developed a relationship with First Media Radio in Rocky Mount and Roanoke Rapids to make our public service announcements. Finally, we plan to ask local churches for an opportunity to offer informational meetings in their facilities.

2. In both public and private schools parent involvement is critical to student success. As a K-8 school, Hobgood Charter School will have the opportunity to build long-lasting relationships with families. It is our goal to establish a strong Parent-Teacher organization to assist in the planning and implementation of activities that strengthen and support student learning. We plan to have a school and community garden in which families are encouraged to participate. Physical fitness opportunities like intramural sports, Walk to School Day, and Field Day encourage parent involvement. Likewise, we will host school day events such as Read Across America Day with evening components to engage parents. We will provide parent seminars on subjects like nutrition, health and wellness, parenting, academic strategies at home, and gardening for which transportation can be provided from our cluster stops as well as hosting opportunities in the communities in which the families live. We will have a Grandparents & Grandfriends Day to recognize the importance of our extended family and friends thus tapping this rich resource of experience. We will provide these events in collaboration with partners like the Hobgood Citizens Group, Nutrition Plus, Action for Healthy Kids, Mc Dowells Pharmacy, and the Scotland Neck Memorial Library. We have built parent conference days into our calendar with options for meeting at the parents home when necessary. Hobgood Charter School is committed to involving parents in the education of their children and thus building strong communities.

Admissions Policy

Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

1. *Tentative dates for the open enrollment application period, enrollment deadlines and procedures. *Please be advised schools cannot accept applications until after final approval from the SBE.*
2. *Clear policies and procedures detailing the open enrollment lottery plan, including policies regarding statutory permitted student enrollment preferences.*
3. *Clear policies and procedures for student waiting lists, withdrawals, re-enrollment, and transfers.*
4. *Explanation of the purpose of any pre-admission activities (if any) for students or parents.*
5. *Clear policies and procedures for student withdrawals and transfers.*

HCS will not discriminate against any student or limit admission based on intellectual ability, measures of achievement or aptitude, athletic ability, race, religion, national or ethnic origin, color, age, military service, disability, or gender, except where exemption is appropriate AND allowed by law.

The first open enrollment period will commence within one month of the final SBE approval for a period of no less than 35 calendar days. After the first year, open enrollment will be Jan. 8th to Feb. 15th every year. Applications will be available from community locations, the school and on the website.

Once final SBE approval is received, applications will be accepted at the school via mail or in person. Applications will be reviewed for completeness and logged with the time and date of receipt. Families may choose to opt in and submit separate information to be included in the weighted preference for students eligible for free lunch. Applications received during the open enrollment period will be assigned to open seats in the order received.

If there are more applicants than seats, a public lottery will be held. The lottery will be weighted to reserve 50% of the open, authorized seats for students eligible for free lunch. Additionally, enrollment preference (up to 15%) is given to: Siblings of currently enrolled students, children of FTE, and children of board members. Once the 15% of seats is reached, remaining applications qualifying for preference will be put with the applications for the general public lottery. During the public lottery, applications will be assigned to open seats and then waiting lists in the order drawn.

Lottery results will be communicated via email or USPS mail. Families will have 15 calendar days to complete and return the student enrollment packages. If the enrollment packages are not received or postmarked within the deadline, the seat will be given to the next applicant on the list. Once enrolled, students will not have to re-apply, but will need to submit a returning student form by the given deadline to determine the available seats for next year's enrollment. Any students remaining on the waitlist must reapply for the next year. If a student wants to withdraw or transfer to another school, HCS would ask a minimum 3 day notice to allow for successful offboarding including the withdrawal reason and expedited preparation of records to be sent to the new school. Records will be sent upon receipt of the official transcript request. Re-enrollment will require a new application and normal application procedures will be followed. There will be an open house during the open enrollment period, but attendance will not be required. This will be an opportunity for families to learn more about the school and have their questions answered. If families are unable to attend the open house, they can reach out to the school to make an individual appointment or phone conference.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes: X

No:

The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

1. *In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
2. *A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones, unless the charter school is operated by a municipality OR the charter school was converted from a traditional public school. Municipal charter schools may give enrollment priority to domiciliaries of the municipality in which the school is located (G.S. 115C-218.45(f)(7)), and charter schools that were converted from traditional public schools shall give admission preference to students who reside within the former attendance area of the school (G.S. 115C-218.45(c)).*
3. *A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

If the applicant is requesting to use a weighted, or otherwise limited, lottery, please provide the following:

1. *A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*

The board is committed to encouraging all scholars to apply regardless of parent's income, race or address. We are requesting approval to use a weighted lottery to ensure that 50% of the seats are available to students living in poverty.

2. *A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*

We will use the federal free lunch guidelines to determine student's eligibility for the weighted lottery. We will set aside 50% of authorized open seats for students eligible for free lunch. We will utilize an application process that provides demographic and income information on a separate sheet. Any open seats not filled in the lottery for students in poverty will be made available to all students.

3. *The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

The board is passionate about serving all scholars in Halifax County and surrounding counties.

PROJECTED ENROLLMENT Year 1 through Year 5

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

LEA #1 Edgecombe County Public Schools
 LEA #2 Halifax County Schools
 LEA #3 Martin County Schools

In the following tables, please list for each year and grade level, the numbers of students that the school reasonably expects to enroll. In addition, please indicate any plans to increase the grade levels offered by the school over time and be sure these figures match those on the initial cover page.

	Year 1			Year 2			Year 3			Year 4			Year 5		
	LEA 330	LEA 420	LEA 580	LEA 330	LEA 420	LEA 580	LEA 330	LEA 420	LEA 580	LEA 330	LEA 420	LEA 580	LEA 330	LEA 420	LEA 580
Kindergarten	6	12	7	12	24	14	12	24	14	12	24	14	12	24	14
Grade 01	6	12	7	6	12	7	12	24	14	12	24	14	12	24	14
Grade 02	6	12	7	6	12	7	6	12	7	12	24	14	12	24	14
Grade 03	6	12	7	6	12	7	6	12	7	6	12	7	12	24	14
Grade 04	6	12	7	6	12	7	6	12	7	6	12	7	6	12	7
Grade 05	6	12	7	6	12	7	6	12	7	6	12	7	6	12	7
Grade 06	6	12	7	6	12	7	6	12	7	6	12	7	6	12	7
Grade 07	6	12	7	6	12	7	6	12	7	6	12	7	6	12	7
Grade 08	6	12	7	6	12	7	6	12	7	6	12	7	6	12	7
	54	108	63	60	120	70	66	132	77	72	144	84	78	156	91
	225			250			275			300			325		

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

V. OPERATIONS

Transportation Plan:

Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal.

Hobgood Charter School will work diligently to ensure that transportation is not a barrier to any student who wishes to attend this school. We will encourage and assist in carpooling and staff will meet and greet students and parents as they arrive at morning drop off and afternoon pickup. This will enhance our efforts at building a sense of community. While this has worked well in recent years, we realize that this is may not be a suitable option for every family. HCS will purchase two buses and set up cluster stops in surrounding communities. Likewise, students with IEPs that reference transportation and homeless students will have these needs met. We have an agreed purchase price for two buses and have included \$50,000 in the budget to include this purchase, maintenance, parts, and diesel fuel. We plan to us Teacher Assistants and maintenance personnel as drivers.

School Lunch Plan:

Describe in detail the school lunch plan that will ensure that no child is lacking a daily meal. The details of this plan should align with the targeted student population and school budget proposal.

Hobgood Charter School does not plan to participate in the National School Lunch Program. HCS will contract food service. Healthy food choices will be a part of our curriculum and its practice will be evidenced during lunchtime. All students will be able to open a pre-paid account for the lunchroom to help parents and guardians pay on a weekly or monthly basis. Students who meet federal guidelines for free lunches will be provided lunch at no cost. We have included \$100,000 in the budget for providing these lunches.

Civil Liability and Insurance (GS 115C-218.20):

The
Nonprofit

shall name the SBE as an Additional Named Insured to their liability coverage for operation of a charter school while obtaining and maintaining insurance at a minimum in the following amounts:

- a. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
- b. General Liability: one million dollars (\$1,000,000) per occurrence;
- c. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
- d. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
- e. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
- f. Workers' compensation: as specified by Chapter 97 of the General Statutes, Workers' Compensation Law.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$2,020.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$3,292.00
Property Insurance	\$3,657,000		\$12,384.00
Automobile Liability	\$1,000,000		\$108.00
Crime Coverage Minimum/Maximum Amount	\$250,000	\$250,000	\$300.00
Other	\$1,000,000		\$3,327.00
Total Cost			\$21,431.00

*The applicant must provide a quote from an insurance provider as part of this application (as Appendix L) to demonstrate the levels of insurance coverage and projected cost.

Health and Safety Requirements:

All public charter schools are required to follow the regulations regarding health and safety as stated in § 115C218.75.

We, the Board members at (Charter School Name) will develop a written safety plan and policies to be shared with staff, parents and students and be available upon inspection from the Department of Public Instruction and local Health Departments.

hcharter 09/26/2018

(Board Chair Signature)

(Date)

Facility:

Note that the SBE may approve a charter school prior to the school's obtaining a facility; however, students may not attend school and no funds will be allocated until the school has obtained a valid Certificate of Occupancy for Educational use to the Office of Charter Schools.

What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy.

Hobgood Charter School has secured a lease for the facility currently operating as Hobgood Academy. It has been operating as a school for 45 years under a certificate of occupancy.

What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.

The lease of for this facility is \$12,000 annually. Total square footage of the educational buildings is 25,612 feet which makes it approximately \$0.47. This cost is significantly less than any similar facility in our three

county area.

Facility Contingency Plan: *Describe the method of finding a facility if the one the board has identified will not be ready by the time the public charter school will be opening. Include information regarding the immediate spatial needs of the school and identify any programs that will not be immediately offered because a permanent facility has yet to open.*

This is not applicable since the facility is currently in operation.

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

VI. FINANCIAL PLAN

In the following sections present a detailed description of assumptions and revenue estimates, including but not limited to the basis for revenue projections, staffing levels, and costs. The narrative should specifically address the degree to which the school budget will rely on variable income.

Budget: Revenue Projections from each Year 1

SHOW
CALCULATIONS
FOR FIGURING
STATE
AND LOCAL
DOLLARS
FOR THE
PROPOSED
CHARTER
SCHOOL

Refer to the
Resource Manual
Finance Section
for guidance on
estimated funding
amounts

State Funds: Charter schools receive an equivalent amount per student as the local education agency (LEA) receives per student receives from the State. Funding is based on the 1st month average daily membership.

- In year 1 – Base state allotments are determined by the LEA in which the student resides
- In year 2 and beyond- Base State allotments are determined by the LEA in which the school is located.

Local Funds: Charter schools receive a per pupil share of the local current expense of the LEA in which the student resides.

Federal Funds: Charter schools must qualify and apply for the individual federal grants based on their population of students.

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1330 - Edgecombe County Public Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$6,408.21	54	\$346,043.34
Local Funds	\$1,105.00	54	\$59,670.00
Federal EC Funds	\$4,464.16	6	\$26,784.96
Totals			\$432,498.30

LEA #2420 - Halifax County Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$7,226.27	108	\$780,437.16
Local Funds	\$930.00	108	\$100,440.00
Federal EC Funds	\$4,261.76	11	\$46,879.36
Totals			\$927,756.52

LEA #3580 - Martin County Schools

Revenue	Approximate Per Pupil Funding	Projected LEA ADM	Approximate funding for Year 1
State Funds	\$6,914.81	63	\$435,633.03
Local Funds	\$1,516.00	63	\$95,508.00
Federal EC Funds	\$3,689.60	7	\$25,827.20
Totals			\$556,968.23

Total Budget: Revenue Projections Year 1 through Year 5

INCOME: REVENUE PROJECTIONS	Year 1	Year 2	Year 3	Year 4	Year 5
-State ADM Funds	\$1,562,114	\$1,806,567	\$1,987,224	\$2,167,881	\$2,348,537
-Local Per Pupil Funds	\$255,618	\$284,020	\$312,422	\$340,824	\$369,226
-Exceptional Children & Federal Funds	\$99,492	\$111,871	\$123,058	\$134,245	\$145,432
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$1,917,223	\$2,202,458	\$2,422,704	\$2,642,950	\$2,863,195

***If the applicant is depending on other funding sources or working capital to balance the operating budget, please provide documentation such as signed statements from donors, foundations, bank documents, etc., on the commitment of these funds. If these figures are loans, the repayment needs to be explained in the narrative and found within the budget projections.**

Assurances are needed to confirm the commitment of these additional sources of revenue. Please include these as Appendix J.

Personnel Budget: Expenditure Projections Year 1 through Year 5

The personnel list below may be amended to meet the staffing of individual charter schools: This list should align with the projected staff located in the Operations Plan.

BUDGET EXPENDITURE PROJECTIONS Personnel	Year 1			Year 2			Year 3			Year 4			Year 5		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Lead Administrator	1	\$75,000	\$75,000	1	\$77,250	\$77,250	1	\$79,568	\$79,568	1	\$81,955	\$81,955	1	\$84,414	\$84,414
Finance Officer	1	\$35,000	\$35,000	1	\$36,050	\$36,050	1	\$37,132	\$37,132	1	\$38,245	\$38,245	1	\$39,393	\$39,393
Maintenance	1	\$23,000	\$23,000	1	\$23,690	\$23,690	1	\$24,401	\$24,401	1	\$25,133	\$25,133	1	\$25,887	\$25,887
Counselor/Test Coordinator	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$43,709	\$43,709	1	\$45,020	\$45,020
Media Specialist/Technology	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$43,709	\$43,709	1	\$45,020	\$45,020
Data Specialist	0	\$0	\$0	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$38,245	\$38,245	1	\$39,393	\$39,393
A - Total Admin and Support:	5		\$213,000	6		\$260,590	6		\$268,409	6		\$270,996	6		\$279,000
Instructional Personnel:															
Exceptional Children Teacher(s)	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$43,709	\$43,709	1	\$45,020	\$45,020
Teacher Assistants	3	\$27,500	\$82,500	4	\$28,325	\$113,300	5	\$29,175	\$145,875	6	\$30,050	\$180,300	7	\$30,951	\$216,765
Teachers	9	\$40,000	\$360,000	10	\$41,200	\$412,000	11	\$42,436	\$466,796	12	\$43,709	\$524,508	13	\$45,020	\$585,260
Summer School Teachers	2	\$8,000	\$16,000	2	\$8,240	\$16,480	2	\$8,487	\$16,974	2	\$8,742	\$17,484	2	\$9,004	\$18,008
Reading Spec./ Instructional Coach	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$43,709	\$43,709	1	\$45,020	\$45,020
Physical Education	1	\$40,000	\$40,000	1	\$41,200	\$41,200	1	\$42,436	\$42,436	1	\$43,709	\$43,709	1	\$45,020	\$45,020
Electives/Specialty Teacher(s)	2	\$40,000	\$80,000	2	\$41,200	\$82,400	2	\$42,436	\$84,872	2	\$43,709	\$87,418	2	\$45,020	\$90,040
B - Total Instructional	19		\$658,500	21		\$747,780	23		\$841,825	25		\$940,837	27		\$1,045,000

Personnel:															
A+B = C - Total Admin, Support and Instructional Personnel:	24		\$871,500	27		\$1,008,370	29		\$1,110,234	31		\$1,211,833	33		\$1,324,
Administrative & Support Benefits															
Health Insurance	5	\$5,869	\$29,345	6	\$5,869	\$35,214	6	\$5,869	\$35,214	6	\$5,869	\$35,214	6	\$5,869	\$35,
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
Retirement Plan--Other	5	\$2,130	\$10,650	6	\$2,554	\$15,324	6	\$2,192	\$13,152	6	\$2,258	\$13,548	6	\$2,326	\$13,
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
Medicare	5	\$618	\$3,090	6	\$740	\$4,440	6	\$635	\$3,810	6	\$654	\$3,924	6	\$674	\$4,
Social Security	5	\$2,641	\$13,205	6	\$3,167	\$19,002	6	\$2,718	\$16,308	6	\$2,800	\$16,800	6	\$2,884	\$17,
D - Total Admin and Support Benefits:			\$56,290			\$73,980			\$68,484			\$69,486			\$70,
Instructional Personnel Benefits:															
Health Insurance	15	\$5,869	\$88,035	17	\$5,869	\$99,773	19	\$5,869	\$111,511	21	\$5,869	\$123,249	23	\$5,869	\$134,
Retirement Plan--NC State	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
Retirement Plan--Other	15	\$1,875	\$28,125	17	\$1,908	\$32,436	19	\$1,947	\$36,993	21	\$1,990	\$41,790	23	\$2,036	\$46,
Social Security	19	\$2,149	\$40,831	21	\$2,207	\$46,347	23	\$2,269	\$52,187	25	\$2,333	\$58,325	27	\$2,399	\$64,
Disability	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
Medicare	19	\$502	\$9,538	21	\$516	\$10,836	23	\$530	\$12,190	25	\$545	\$13,625	27	\$561	\$15,
Life Insurance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	
E - Total Instructional Personnel Benefits:			\$166,529			\$189,392			\$212,881			\$236,989			\$261,
D+E = F - Total Personnel Benefits			\$222,819			\$263,372			\$281,365			\$306,475			\$332,
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	5		\$269,290	6		\$334,570	6		\$336,893	6		\$340,482	6		\$349,

B+E = H - Total Instructional Personnel (Salary & Benefits)	19		\$825,029	21		\$937,172	23		\$1,054,706	25		\$1,177,826	27		\$1,306,
G+H = J - TOTAL PERSONNEL	24		\$1,094,319	27		\$1,271,742	29		\$1,391,599	31		\$1,518,308	33		\$1,656,

Operations Budget: Expenditure Projections Year 1 through Year 5

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		Year 1	Year 2	Year 3	Year 4	Year 5
	Administrative & Support:					
Office:	Office Supplies	\$5,000	\$5,150	\$5,305	\$5,464	\$5,628
	Paper	\$1,200	\$1,236	\$1,273	\$1,311	\$1,351
	Computers & Software	\$5,000	\$5,150	\$5,305	\$5,464	\$5,628
	Communications & Telephone	\$7,100	\$7,313	\$7,532	\$7,758	\$7,991
	Copier leases	\$4,600	\$4,738	\$4,880	\$5,027	\$5,177
	Postage	\$1,000	\$1,030	\$1,061	\$1,093	\$1,126
Professional Contract	Legal Counsel	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255
	Financial	\$15,000	\$15,450	\$15,914	\$16,391	\$16,883
	Financial Cash Management	\$16,875	\$18,750	\$20,625	\$22,500	\$24,375
	Power School Support	\$7,875	\$8,750	\$9,625	\$10,500	\$11,375
	Auditor	\$0	\$8,000	\$8,240	\$8,487	\$8,742
Facilities	Facility Lease/Mortgage	\$12,000	\$12,000	\$12,000	\$12,000	\$12,000
	Maintenance	\$40,000	\$41,200	\$42,436	\$43,709	\$45,020
	Custodial Supplies	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255
	Insurance (pg19)	\$25,000	\$25,750	\$26,523	\$27,318	\$28,138
	Exterminator Contract	\$1,200	\$1,236	\$1,273	\$1,311	\$1,351
	Furniture And Equipment	\$50,000	\$51,500	\$53,045	\$54,636	\$56,275
Utilities	Electric And Water	\$50,000	\$51,500	\$53,045	\$54,636	\$56,275
	Propane	\$10,000	\$10,300	\$10,609	\$10,927	\$11,255
	Trash	\$3,000	\$3,090	\$3,183	\$3,278	\$3,377
Transportation	School Year	\$50,000	\$44,290	\$45,619	\$46,987	\$48,397
	Summer School	\$5,833	\$6,008	\$6,189	\$6,374	\$6,565
Other	Marketing	\$6,000	\$6,180	\$6,365	\$6,556	\$6,753
	Child nutrition	\$100,000	\$114,444	\$129,666	\$145,697	\$162,573
	Travel	\$1,200	\$1,236	\$1,273	\$1,311	\$1,351
	Board Development-Seminars/Consultants	\$5,000	\$5,150	\$5,305	\$5,464	\$5,628
	Publications	\$500	\$515	\$530	\$546	\$563
	K - TOTAL Administrative & Support Operations	\$443,383	\$470,566	\$498,039	\$526,599	\$556,307
	Instructional:					
Classroom Technology	Computers	\$20,000	\$22,222	\$24,444	\$26,667	\$28,889

If you have questions regarding the application process, please contact the Office of Charter Schools via email at danielle.allen@dpi.nc.gov.

	Software	\$1,000	\$1,111	\$1,222	\$1,333	\$1,444
	Instructional Technology	\$15,000	\$16,667	\$18,333	\$20,000	\$21,667
Instructional Contract	Staff Development	\$15,000	\$16,667	\$18,333	\$20,000	\$21,667
	Support For Ec Services	\$50,000	\$55,556	\$61,111	\$66,667	\$72,222
Books and Supplies	Instructional Materials	\$35,000	\$38,889	\$42,778	\$46,667	\$50,556
Books And Supplies	Summer School	\$4,000	\$4,444	\$4,889	\$5,333	\$5,778
Books and Supplies	Curriculum/Texts	\$55,000	\$61,111	\$67,222	\$73,333	\$79,444
	Copy Paper	\$5,000	\$5,556	\$6,111	\$6,667	\$7,222
	Testing Supplies	\$3,000	\$3,333	\$3,667	\$4,000	\$4,333
Books And Supplies	Pd Materials	\$1,200	\$1,333	\$1,467	\$1,600	\$1,733
	L - TOTAL Instructional Operations	\$204,200	\$226,889	\$249,577	\$272,267	\$294,955
	K+L = M - TOTAL OPERATIONS	\$647,583	\$697,455	\$747,616	\$798,866	\$851,262

Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	Year 1	Year 2	Year 3	Year 4	Year5
J - TOTAL PERSONNEL	\$1,094,319	\$1,271,742	\$1,391,599	\$1,518,308	\$1,656,405
M - TOTAL OPERATIONS	\$647,583	\$697,455	\$747,616	\$798,866	\$851,262
J+ M =N TOTAL EXPENDITURES	\$1,741,902	\$1,969,197	\$2,139,215	\$2,317,174	\$2,507,667
Z - TOTAL REVENUE	\$1,917,223	\$2,202,458	\$2,422,704	\$2,642,950	\$2,863,195
Z - N = SURPLUS / (DEFICIT)	\$175,321	\$233,261	\$283,489	\$325,776	\$355,528

Budget Narrative: (No more than one and a half pages)

Please include additional information that showcases all assumptions for your budgetary calculations.

1. *How was the student enrollment number projected?*

Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.

Provide the break-even point of student enrollment.

The student enrollment projection was determined by looking at survey data results and facility capacity. Survey data shows that there were 238 students interested in 225 K-8 openings. This would indicate that a lottery will probably be needed. Year 1 breakeven is at 216 students with the proposed budget.

Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

Should anticipated revenues not be received or are lower than estimated, the school has identified several ways to cut expenditures to ensure the school's needs are met. If the revenue drop is due to fewer students than anticipated, the per student costs will automatically be reduced. Additional measures may include: reduction in the personnel budget, limiting nonessential purchases for custodial supplies, maintenance costs, furniture and equipment costs, more fundraising activities, and additional solicitation of donated materials and funds.

Does the budget rely on sources of funds other than state, county, and federal (e.g. loans, donations etc.)? If so, please provide the source and amount. Be sure that the appropriate assurances documentation is provided in the appendices

No. The current budget does not include any other funds that may potentially be solicited.

Provide the student to teacher ratio that the budget is built on.

The budget shows approximately 16 students/teacher

2. *Does the school intend to contract for services such as student accounting and financial services, exceptional children instructional support, custodial etc. Describe the criteria and procedures for the selection of contractors and large purchases.*

The school intends to contract with Team CFA to run our financial program and Power School. Additional funds have been set aside for Contract Support Services for EC students.

Contractors and vendors will bid for opportunities. They will be selected by the principal and financial manager with additional input from appropriate board members or staff that may have additional knowledge or expertise. Factors to be considered may include: pricing, stability of vendor (will it stay in business long enough to complete commitment), referrals/reviews from other customers - if applicable, potential or perceived conflicts of interest, review of qualifications, and possibly safety and background records. Large purchases would require approval from the financial committee and possibly the full board. If there is any potential for a conflict of interest, the affected party would recuse himself or herself from negotiations.

3. *Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.*

The budget provides funds for Professional Development to help our staff meet the needs of our students. Funds for Curriculum/texts, instructional materials, summer school, will be provided to support the curricular offerings. Access to all students will not be denied and funding has been put in place to facilitate the transportation plan both during the school year and summer school. To support facility needs, funds for maintenance, custodial supplies, furniture/equipment, pest control, and utilities have been allocated. There will be some cost savings for existing supplies, materials and equipment that will be realized as a result of converting from the private school to the charter school.

4. *What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.*

The school intends to set aside approximately 10% of it's expenditures for the general fund balance the first year. That percentage will be increased to approximately 14% by year 5 for a total goal of over \$1,000,000 in the general fund by the end of 5 years.

5. *Provide a description of proposed financing structure. Include financing of facilities, other asset financing and leases.*

There are will be two leases; the facility lease of \$12,000 per year and the copier lease of \$4600 per year. There are no other proposed financing structures.

6. *Will the school have assets from other sources (e.g. building, furniture, chairs, computers, etc.)? If yes, please provide a list. Note which are secured and which are anticipated, and include evidence of commitment for any assets on which the school's core operation depends.*

Since the school already operating, it has the contents required for operations such as desks, chairs, computers, library books, custodial and maintenance equipment, gym equipment, etc.

Financial Compliance: (No more than a half of a page)

How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate recording keeping?

To ensure adequate internal financial controls, the school will require multiple signatures on checks, retain Team CFA for financial services support, require regular reports from the head of school, financial manager, treasurer, and finance committee, and finally retain an independent auditor for financial and operational compliance. Financial policies will be reviewed regularly to determine compliance with current laws and best practices.

Provide any known or possible related party transactions (relationship, description of transaction and estimated dollars involved)

None known at this time.

Provide the name and contact information of the independent audit firm who will conduct the annual financial statement audit. If a firm has yet to be identified please list the firms the board has investigated.

We have not determined which firm we will hire to complete our annual audit, but we are currently investigating Darrell L. Keller CPA PA and Andrew Harris CPA PLLC.

I certify that this subsection has not been copied, pasted, or otherwise plagiarized from any other charter application.

VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the October 1, 2018 5:00 pm EST deadline. Payments will be accepted in the form of a certified check. Cash is not accepted.

*Application Note: The applicant must mail the certified check along with a letter indicating the name of the proposed charter school, contact information and the enclosed payment amount to be received before or on the due date of October 1, 2018 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.

Payments should be made payable to North Carolina Department of Public Instruction

North Carolina Department of Public Instruction
Office Of Charter Schools
6307 Mail Service Center
Raleigh, NC 27699-6307

I understand the requirements pursuant to G.S. 115C-218.1(c).

hcharter

Date: 09/27/2018

Applicant Signature:

The foregoing application is submitted on behalf of Hobgood Charter School (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy "Planning Year for New and Preliminary Charter Schools – CHTR 013, formerly "TCS-U-013," all new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: hcharter

Board Position: Vice Chairman HCS Board

Signature: _____

Date: 09/27/2018

Sworn to and subscribed before me this
_____ day of _____, 20____.

Notary Public Official Seal
My commission expires: _____, 20____.



NATIONAL
CHARTER SCHOOL
RESOURCE CENTER
AT SAFAL PARTNERS

INTENTIONALLY DIVERSE CHARTER SCHOOLS: A Toolkit for Charter School Leaders





NATIONAL
CHARTER SCHOOL
RESOURCE CENTER
AT SAFAL PARTNERS

The National Charter School Resource Center (NCSRC) is dedicated to supporting the development of high-quality charter schools. The NCSRC provides technical assistance to sector stakeholders and has a comprehensive collection of online resources addressing the challenges charter schools face. The website hosts reports, webinars, and newsletters focusing on facilities, funding opportunities, authorizing, English learners, special education, military families, board governance, and other topics. The NCSRC is funded by the U.S. Department of Education and led by education consulting firm Safal Partners.

[National Charter School Resource Center](http://www.charterschoolcenter.ed.gov/) (<http://www.charterschoolcenter.ed.gov/>)



Safal, meaning “good outcomes” in Sanskrit, is a mission-driven strategy consulting firm that supports education reform efforts at the federal, state, district, and school level. We bring deep domain knowledge in the charter sector, human capital management systems, and next generation learning. Safal Partners’ clients include the U.S. Department of Education, leading foundations and non-profits, and state and district agencies.

[Safal Partners](http://www.safalpartners.com/) (<http://www.safalpartners.com/>)

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Safal Partners: Kern, N. (2016). Intentionally Diverse Charter Schools: A Toolkit for Charter School Leaders

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INTRODUCTION



2016 marks the 25th anniversary of the charter school sector. To date, the charter school model has been commonly used to create school options with a mission to facilitate innovations in school design and pedagogical models, particularly for the most underserved children and communities. This has been driven by parent demand and educator visions for learning environments otherwise unavailable in traditional public schools.¹

Recently there has been increasing interest in schools with the intentional purpose of serving a balance of students who reflect the diversity of their larger communities. This toolkit describes some of these intentionally diverse charter schools and the strategies their leaders pursue to achieve their goals.

Research on school diversity efforts finds that students of color and from low-income families benefit from attending schools that are not segregated by race or socioeconomic status. These benefits include:

- Academic improvements demonstrated through higher test scores, fewer dropouts, and higher graduation rates;²
- Behavioral benefits such as a greater likelihood of doing homework, attending class regularly, and being subject to disciplinary actions less often;³
- Long-term benefits such as increased college enrollment, employment, and earnings.⁴

These studies have further found that students from both low-income and middle-income families benefit from diverse educational settings. Students from low-income families see improvements from working with students from middle-income families where parents are likely to have larger vocabularies, have time and resources to be more involved in school, and set greater expectations for their children to attend college.⁵ Students from middle-income families who are educated with less affluent peers were able to more effectively work with more diverse people throughout adulthood.⁶ All students in diverse settings benefit from cross-racial and cross-cultural understanding, breaking down stereotypes, and decreasing bias and prejudice.⁷

Within the body of research on school composition, there is evidence of the negative impacts of concentrated poverty and segregation in traditional district schools, along with descriptions of strategies that can help overcome these impacts, such as busing, magnet schools, and inter- and intra-district school choice programs.⁸ Generally, traditional public schools serve those who live within the school's attendance zone; correspondingly, these schools' student populations are often homogenous, reflective of local housing patterns.⁹ In many circumstances, charter schools can be affected by these dynamics, similar to other public schools. Various strategies have been used in

non-charter settings to address these challenges. For example, magnet schools are district-run public schools that draw from a larger geographic catchment zone, but unlike charter schools, may have a selective admissions process that could include testing, auditioning, or portfolio requirements. Charter schools are open enrollment public schools. To ensure equitable access, generally charter schools use lotteries for enrollment when there is greater demand than available seats, do not have attendance zones, and may be open to students throughout the district in which the school is located or to families in the surrounding districts.¹⁰

Since charter schools often have more flexible enrollment procedures than their traditional district school counterparts that typically assign students based on residence-based attendance zones, charter schools may be better able to attract and enroll students who reflect the broader community.¹¹ As such, a small but growing strategy among charter schools is to design and implement a model that aims to serve an all-encompassing variety of backgrounds, including but not limited to a racially, culturally, linguistically, and socioeconomically diverse student body (hereafter referred to as “intentionally diverse” schools).

Reflecting the growing interest in charter schools’ potential to lead school diversity efforts, the National Coalition of Diverse Charter Schools was formed in 2014 and currently has 93 member charter schools located in 15 states and the District of Columbia.¹² The Coalition’s growing membership of intentionally diverse charter schools shows interest and commitment to diverse educational settings within the charter school sector.

Intentionally diverse schools are one educational model that aims to prepare all students to excel academically while cultivating students’ ability to engage and interact with peers and adults from different backgrounds.¹³ In these schools, diversity is comprehensively woven into all aspects of the school model in order to ensure it translates into a meaningful, daily experience for every member of the school community. This means setting rigorous equity goals with actionable accountability measures at the school-, classroom-, and student-levels.

PURPOSE AND USE OF THE TOOLKIT

There is a large body of work and research on school desegregation efforts, but there are limited resources that specifically focus on how to achieve student diversity in the charter school context. To contribute to this growing body of work, the National Charter School Resource Center (NCSRC) presents this toolkit for charter school leaders who are interested in creating and maintaining intentionally diverse charter schools.

AUDIENCE

This toolkit is designed to help charter school leaders and their stakeholders design and implement intentionally diverse charter schools.

Using this toolkit, leaders—defined broadly to include school founders as well as active parents and governing board members—will learn more about how to measure student diversity, how to intentionally recruit and retain students, how to ensure that diversity is supported and experienced meaningfully at the individual, classroom, and schoolwide levels, and how to create and run schools that help all children thrive.

USING THE TOOLKIT

The toolkit presents decisions and actions to consider when designing and implementing an intentionally diverse school. Leaders developing intentionally diverse charter schools should:

- Define, Measure, and Share School Diversity Goals
- Plan School Features to Attract Diverse Families
- Design Processes to Recruit and Enroll a Diverse Student Body
- Create and Maintain a School Culture that Supports and Values Diversity

These actions are related and can be considered holistically as school leaders create plans to serve a diverse student body. These considerations are informed by the existing body of research as well as interviews conducted with charter school leaders across the nation who have successfully established and maintained a diverse student body.¹⁴

Laying the foundation for diversity in the early stages of school planning and design will help schools effectively attract, enroll, serve and retain diverse students. That said, leaders of existing charter schools can also use this toolkit to revisit diversity goals or to solve implementation challenges. Because student enrollment in a charter school is not static, areas for improvement may emerge as the charter school and the surrounding community it serves evolve over time.



The NCSRC developed this toolkit in conjunction with case study videos that feature concrete examples of how a Valor Collegiate Academies, a charter school network in Nashville, Tennessee, approaches racial, cultural, and socioeconomic diversity. [View the case study videos.](#)

The toolkit provides context about research and the legal and regulatory guidance on pursuing an intentionally diverse school. Although the toolkit discusses legal frameworks that may guide charter schools' diversity efforts, it does not constitute legal advice. Charter school leaders should seek legal counsel if they have legal questions as they pursue an intentionally diverse school model.

There are significant policy barriers that impede progress toward opening and operating intentionally diverse schools. District, state, and federal law and regulations govern charter schools and may include obstacles such as geographic restrictions on where schools can operate and recruit students or a lack of tools to manage enrollment — such as limitations on weighted lotteries or attendance zones. Other barriers include housing segregation, transportation and facilities costs, and political resistance.¹⁵ This toolkit acknowledges the significant impact these policies and barriers have on a school leader's ability to design and operate an intentionally diverse charter school, but limits its focus to school leaders' actions and decisions in establishing their schools and not on district, state, and federal law and regulations. For resources on policy areas that guide charter school operation, please visit the [NCSRC](http://www.charterschoolcenter.ed.gov/) at (<http://www.charterschoolcenter.ed.gov/>).

I: DEFINE, MEASURE, AND SHARE SCHOOL DIVERSITY GOALS



Charter school leaders designing and running schools to serve a diverse student body need to clearly define “diversity” for their school, set diversity goals, and select metrics to measure those goals. This approach is especially important if the school’s mission explicitly calls for an intentionally diverse student body.¹⁶ Such definitions will determine the school’s measures and metrics for achieving its diversity goals and guide important decisions regarding the school’s design and operation. Diversity goals, measures, and metrics affect more than enrollment — they are likely to touch on a school’s performance, engagement, discipline, and other areas as well. Incorporating diversity into these measures can inform and promote a school’s ability to make diversity a meaningful and integral experience for all students.¹⁷

DEFINE DIVERSITY

As noted earlier, school leaders should also consider the legal implications of their chosen measures. Student diversity, especially racial measures, are litigated and regulated topics in education. State and federal legal precedents may impact a charter school’s design and ability to pursue student diversity.¹⁸

Questions that school leaders might consider as they define diversity include:

- **What does diversity mean to us? Are we seeking to reflect:**
 - The demographics of the neighborhood where the school is located?
 - The demographics of the community we serve?
 - The demographics of only public school students?
 - The demographics of the entire school district?
 - The demographics of the whole city, town, or state?
- **How do we define diversity over time? What happens if:**
 - The demographics of the neighborhood where the school is located shifts?
 - In the case of charter schools that are affected by district attendance policies, the state redefines district requirements regarding attendance eligibility that change school feeder patterns?
 - Example 1: A district adopts a city-wide enrollment process. A unified enrollment process can limit the school’s ability to impact student enrollment through recruitment efforts. Parents who are best able to navigate the city’s enrollment process could be advantaged and disproportionately apply for charter schools and other schools of choice outside of the family’s neighborhood school option. Details in the design of a city-wide enrollment

process can further or restrict efforts to create an intentionally diverse school.¹⁹

- Example 2: A state changes how charter schools can operate. In some states, charter schools can enroll students from throughout the state. Statewide enrollment could widen the applicant pool, depending on the family's ability to transport their child to the school. Other states, such as Illinois, restrict charter school attendance to particular cities. In Alabama, new charter schools must first give preference to students within the district boundary, and then may enroll students without regards to residency if there are still available seats.²⁰
- **What type(s) of data do we use to develop and measure our diversity goals regarding enrollment?**
 - Data collected through the Census?
 - Data collected through parent surveys?
 - Data collected appropriately through the application process?²¹
 - Data collected by public or private service organizations, as applicable (e.g., afterschool or early childhood care providers, real estate companies, etc.)?
- **How do we incorporate diversity into the school charter agreement with the authorizer? Does diversity or related measures factor into:**
 - The mission statement?
 - Performance indicators or frameworks?
 - Renewal criteria?
 - Governance and staffing?
- **How does diversity affect data and metrics used in the school? How will the school track, analyze, and report data regarding:**
 - Academic performance?
 - Attendance and retention?
 - Discipline and engagement?
 - Parental involvement and satisfaction?
 - Staff recruitment and retention?

SELECT METRICS TO MEASURE DIVERSITY

Once school leaders, with the school's governing board, have set a vision for a diversity plan, they can then select specific measures to gauge whether the school is achieving its diversity goals. This can include school leaders setting goals and accountability metrics to track any student-level inequities. Monitoring any discrepancies between individual and groups of students can help ensure that all students are being integrated into the school community. As mentioned earlier, measures of socioeconomic status (SES) in diversity considerations can be less legally fraught and more effective than race-based measures.²²

Free and reduced-price lunch (FRL) eligibility is one of the most widely-available and used data points for student demographics. Census data contain other SES measures such as parental income, parental education, home ownership rates, number of single-family households, and

number of residents who are not proficient in English. All of these indicators can be used as proxies for income levels. A school may want to consider these non-race-based SES measures, along with FRL eligibility, for a fuller picture of student and family backgrounds.

In addition to SES measures, school leaders may also consider other ways to increase racial and ethnic diversity within the bounds of existing laws. Measures involving race are some of the most legally complex, due to the many laws that prevent discrimination based on race and the decades of related legal actions. The Civil Rights Act of 1964 bars public and private institutions that receive federal financial assistance from discriminating based on race, color, or national origin. The Equal Protection Clause of the Fourteenth Amendment to the Constitution and Titles IV and VI also prohibit schools from discriminating by race. Schools should adopt measures that do not consider the race of an individual student before considering measures that take race into consideration.

According to guidance issued by the U.S. Departments of Justice and Education, schools may use approaches that do not rely on the race of individual students to achieve greater student body diversity. The guidance clarifies, “race-neutral approaches can take racial impact into account but do not rely on race as an express criterion. Race-neutral approaches can be used for decisions about individual students, such as admissions decisions for competitive schools or programs, as well as for decisions made on an aggregate basis, such as the drawing of zone lines that affect a large number of students.”²³ Schools that are pursuing diversity should exhaust all race-neutral approaches before pursuing other measures. Race-neutral measures include:

- Students’ socioeconomic status
- Parental education
- Students’ household status
- Neighborhood socioeconomic status
- Geographic location
- Composition of area housing

If a school is unable to achieve its “mission or priorities” to serve a diverse student body by employing race-neutral approaches, the guidance states that the school can then move to consider generalized race-based approaches. Generalized race-based approaches, “employ expressly racial criteria, such as the overall racial composition of neighborhoods, but do not involve decision-making on the basis of any individual student’s race.”²⁴ A school can consider individual racial classifications only if race-neutral and generalized race-based approaches still do not achieve a diverse student body. A school should seek legal counsel to confirm that all race-neutral possibilities have been ruled out and that generalized race-based or race-based measures need to be used for the school to achieve its diversity mission or priorities.

If a school uses race-based measures, race cannot be the student’s only defining characteristic; other student features must also be considered. A school that chooses to use race-based measures will need to keep careful documentation to prove that these measures are necessary and that all other non-race-based measures have been exhausted. For example, these documents should include the school’s educational mission, diversity plan, and diversity approaches that were considered or ruled out. Finally, race-based measures should periodically be revisited in case they become unnecessary to achieve the school’s diversity goals, and the school can instead rely on race-neutral or generalized race-based measures.

Questions that School Leaders can Consider to Help Measure Diversity Race-neutral measures

- What percentage of students qualify for free or reduced-price lunch within the district or city?
- Where do students live? (e.g., urban or rural area)
- Are there two parents in the household? Or is it a single-parent household?
- How many years of education has the parent completed?
- What is the average household income in the zip code that students live in?
- What is the home ownership rate in the neighborhood the students live in?
- Is the neighborhood where the students live comprised mostly of subsidized housing, single-family homes, high-density public housing, or rental housing?
- What percentage of residents are not proficient in English within the district or city?

Generalized race-based measures

- What is the racial composition of the neighborhoods within the district or city?
- What are the racial demographics of feeder schools or neighborhoods?

SHARE SCHOOL DIVERSITY GOALS

After school leaders work with their governing board to thoroughly consider the school's approach to educating an intentionally diverse student body, school leaders should communicate that vision to key stakeholders. For schools in the planning phase, its board may choose to explicitly include diversity in the school's mission statement. For an operating school that seeks to improve student diversity, the school's board could adopt a resolution or propose an amendment to the school's charter that includes the school's vision for diversity goals. Intentionally diverse schools should seek to mirror the diversity they value in their student body as well as in their leadership. Therefore, it is important to build a board with diverse backgrounds and perspectives so that the school's mission is reflected throughout all levels of the school.

Charter school leaders and their boards have control over defining the school's diversity plan, the measures to track progress towards diversity goals, and recruiting a board and staff that support the school's mission. However, attracting philanthropic funding can be a challenge to opening an intentionally diverse charter school. Many individual funders and foundations focus on students with the greatest unmet needs, and thus target their resources toward schools with a high proportion of students from low-income families. An intentionally diverse charter school is likely, for example, to have fewer children from low-income backgrounds than charter schools in the area that do not prioritize attracting middle-income students. Private funders may face a philosophical challenge when an intentionally diverse school requests funding and it has a less than 50 percent FRL student population.

A school leader and board may need to pursue a new or broader set of donors if the per pupil funding is inadequate to meet operating and capital needs of the school. When speaking to charter school funders, school leaders could emphasize the social, cognitive, civic, and academic benefits that all students experience in diverse educational settings.²⁵ Studies suggest that students from low-income families enjoy academic benefits from diverse educational settings when about 30 to 70 percent of the students are FRL eligible and the remainder of the student body is from middle-

income backgrounds.²⁶ Researchers suggest that students from low-income families show academic gains in diverse settings because the effects of poverty are worse when the majority of students are from low-income backgrounds.²⁷ Further, middle-income students do not show academic losses from attending schools with peers from lower-income families.²⁸ All students in diverse settings have cultural competency benefits through breaking down stereotypes and decreasing bias and prejudice.²⁹ The majority of the National Coalition of Diverse Charter Schools members enroll student bodies that are between 30 percent and 70 percent FRL eligible.³⁰

School leaders seeking grants from private funders who prefer to support children from low-income backgrounds may direct foundation investments toward programs and activities that target the underserved students within their school. For example, targeted funds could support enrichment and support services (discussed further in Section IV). Some funders view opening the door to more resources for students as their ultimate goal and have embraced diverse settings as a tool to reach underserved students.³¹ New fundraising opportunities may arise as the body of evidence and practice on intentionally diverse charter schools continues to grow.

Other important stakeholders in supporting diverse educational settings include community organizations, school staff, and families. Engagement and support resources for these stakeholders will be discussed in the following sections.

II: PLAN SCHOOL FEATURES TO ATTRACT DIVERSE FAMILIES



By its mission, an intentionally diverse student body requires a broad applicant pool. As charter school leaders know, parents seeking the right school for their child will consider a wide range of factors. Many of these factors might be school-based elements, such as the school's quality, mission, location, transportation offerings, instructional program, discipline system, culture, and approach to pedagogy. This section explores school-based design and programming factors that charter school leaders can purposefully craft to draw families from diverse backgrounds.

Household wealth determines the neighborhood a family can afford. In turn, where families live affects their children's educational options.³² Data show that household income is related to school performance: in 76 percent of neighborhoods with poverty rates higher than 20 percent, the local elementary schools perform in the bottom half of the state's schools.³³ Further, some school attendance zones are drawn based on real estate and housing patterns—often reinforcing a neighborhood's racial and economic segregation. The vast majority of students in the U.S. (82 percent) attend schools based on assigned zones,³⁴ in comparison to 18 percent of students who choose to attend district, magnet, or charter public schools.³⁵ Therefore, the accessibility and the location of a suitable facility strongly impacts a charter school's applicant pool and recruitment strategy.

While a charter school's location can be a powerful tool for increasing diversity, access to facilities is a significant barrier. Many charter school operators have few, if any, choices for their facility or its location in a neighborhood or city. Nevertheless, some school leaders have used their school's location as a tool to shape student diversity. Facilities located in an area of urban renewal, at the border of neighborhoods or cities of differing income levels, or near affordable housing units can all impact applicant pools and enrollment. For example:

- **Valor Collegiate Academies**, a charter management organization (CMO) in Tennessee, purchased facilities for two middle school campuses in southeast Nashville. Southeast Nashville is home to a large population of recent immigrants and refugees, including the largest Kurdish population in the U.S.³⁶ While lower-income and immigrant families comprise most of the families that live in the school's immediate neighborhood, there are more affluent neighborhoods within a few miles of the school. Valor Collegiate Academies Chief Executive Officer (CEO) Todd Dickson noted, "One of the key things if you want to get socioeconomic diversity is locating the school in a lower-income area. This is really smart and important because it's easier for your families from disadvantaged backgrounds to get to the school if it's closer to them." Dickson adds that, "If you could pick the perfect spot,

you'd also want to be close to multiple different communities so that they all have access to the school. Southeast Nashville was a perfect spot for us for that reason.”³⁷

- **Voice Charter Charter School**, is located in Long Island City, New York. This part of the New York City metropolitan area was founded as an industrial center. Long Island City in the borough of Queens, just across the river from Manhattan, has a large immigrant population and the largest housing project in the U.S. and is also surrounded by middle-income suburbs, like Jamaica Hills.³⁸ The K–8 school has two campuses that are two blocks apart. One of those campuses is co-located in a district school facility and shares the space with a New York City traditional public school. Voice’s Long Island City location helps the school attract lower-income immigrant families from many different countries of origin, families living in the surrounding housing projects, and middle-income families living in more affluent neighborhoods.³⁹
- **The Denver School of Science and Technology (DSST)** is an expanding charter school network that currently has 7 secondary school campuses throughout the Denver, Colorado metro area. DSST is regarded as one of the top STEM (Science, Technology, Engineering, and Math) schools in the United States. Their reputation generates great parental demand and subsequent long wait lists for enrollment.⁴⁰ All DSST schools have valued diversity since their inception, and DSST’s newer schools were deliberately located in underserved communities to increase enrollment of students from underserved backgrounds. The DSST: Green Valley Ranch (GVR) campus opened in 2012, and it was intentionally designed to serve the diverse neighborhood in which the school is located.

Transportation can also affect families’ access to schools. State laws vary greatly and should be consulted about funding, restrictions, and procedures. State laws can include policies affecting whether local districts may provide transportation to charter school students, or if a charter school can or must directly provide transportation.⁴¹ Relying on district services for transportation can have unintended consequences. For example, the charter school may become tied to the district calendar or daily schedule.⁴² Charter school leaders deciding where to locate a school may want to consider the implications of transportation options on their school’s location, such as:

- Is the district responsible for funding any transportation options—such as busing, or free or reduced-price fare for public transportation?
- Are there public transportation options within walking distance of the school?
- What are the demographics of the neighborhoods that are within walking distance of the school?
- What are the costs for the school to provide busing for students?
- Are there specific distance restrictions that should be prioritized for school busing services?⁴³

Below are examples from the field that range from a school providing all transportation services to schools that are able to access district or city transportation resources:

- **Valor Collegiate Academies** provides five school buses that serve about 300 of the 700 enrolled students. The school prioritizes bus service for students from low-income families who would not be able to get to Valor schools without transportation. This low-income priority means that buses primarily serve the families in the school’s immediate area. Many of the

middle-income families who live farther from the school organize carpools or drive their students to the school. Valor spends about 5 percent of its operating budget on transportation.⁴⁴

- **Voice Charter School** can access the New York City Department of Education’s Office of Pupil Transportation (OPT). Based on the distance between a student’s home and school, OPT provides yellow buses or free/reduced student fare passes for public transportation. Most of Voice’s K–5 students ride the yellow school bus or take a public city bus to school with their family. The older students in grades 6–8 tend to take a yellow or public city bus or the subway to get to the school. There also is a staggered schedule between yellow school buses and parents that drive their students.⁴⁵
- **DSST: GVR** students can access Denver Public Schools district bus services, which are offered to any student in a district, magnet, or charter public school that meet eligibility criteria. The citywide school bus service prioritizes service for students attending their zoned school, but students that are accepted into a school of choice and meet eligibility criteria, such as living a specified distance from their school of choice, may apply for bus service on a first-come, first-served basis.⁴⁶

The instructional model of the school is also an important tool to attract a broader range of families. A school can survey local families to learn about their educational preferences and offer programming accordingly. Schools should not simply assume they know what families want. For example, some families may place the highest value on proximity, while others focus on pedagogy or school safety. While every parent has unique preferences for their child’s education, a national survey conducted by the Thomas B. Fordham Institute on parents’ educational preferences found that, in general:

- Families from all income levels valued programs that focused on critical thinking skills, strong reading and math curricula, and an emphasis on STEM as top priorities;⁴⁷
- Middle-income parents are often attracted to progressive educational approaches, in which students play a stronger role in shaping their learning, or where a school’s specific mission or orientation is shaped to facilitate student engagement. Examples include schools that “emphasize arts and music instruction,” and in which their child “develops an appreciation for nature” and “develops fluency in a foreign language”;⁴⁸
- Low-income parents are more likely to choose a structured educational pedagogy, such as a model that emphasizes core academic subjects;⁴⁹
- Black parents and politically liberal parents are more likely to favor educational settings where students learn to work with peers from diverse racial, ethnic, or socio-economic backgrounds or cultures;⁵⁰ and
- Dual language immersion programs are attractive to families that have recently immigrated or have students who are English Learners. Language immersion programs also have appeal for middle-class families that want their children to be fluent in another language and learn with native speakers.⁵¹



EXAMPLE FROM THE FIELD

Voice Charter School: A Unique Instructional Model

Federal Charter School Program Grantee: Yes

Location: Long Island City, New York

Grades Served: K-8

Student Enrollment: 593

Student Demographics, 2014-2015

- 1% White
- 11% Black
- 58% Hispanic
- 17% Asian
- 3% Other
- 78% FRL eligible
- 16% English Learners
- 14% Students with disabilities

Voice Charter School was founded to help English Learner (EL) students with language acquisition. Voice's model is built on incorporating choral music into instruction every day. The research behind the program is based on Total Physical Response (TPR). TPR theory suggests that physical movement, including singing, accelerates learning in any language.⁵² The foundational language instruction that is designed for EL students is given to all Voice students because the intervention has benefited students at all language levels.⁵³

Principal Franklin Headley asserts that students' ability to learn through music is based in good teaching versus a student being musically gifted. The school's choral music program includes daily phonics instruction, which helps all students learn the fundamentals of pronunciation. As a result, at the end of the year, students are able to sing songs in many languages because they understand the components of pronunciation. For example, Voice kindergarteners typically learn more than 250 songs throughout the year. The music program is an opportunity to share world music and learn songs from many of the students' countries of origin. The school has also received grants to bring in performers to sing in foreign languages and perform traditional dances. Parents are invited to join these cultural performances.⁵⁴



TOOLBOX TIP

Supporting School Culture Through Alternative Discipline Approaches

School discipline policies and practices directly impact the school's climate and student achievement.⁵⁵ Intentionally diverse schools thrive when school culture recognizes and celebrates student and staff diversity at the individual and schoolwide levels. Such structures contribute to a

safe and supportive school culture. All school leaders can benefit from analyzing their discipline policies and practices. Periodic examination of discipline

Exclusionary discipline, defined as any disciplinary action that removes or excludes a student from his or her usual educational setting, is disruptive to student learning. Additionally, K-12 public schools tend to disproportionately apply exclusionary discipline, such as suspensions and expulsions, to children of color and those with disabilities.⁵⁶ However, there are research-based, alternative discipline models that have been shown to improve students' academic and non-academic skills and outcomes.⁵⁷ To learn more about alternative discipline practices in charter schools, please visit the NCSRC [page on discipline](#) for a host of resources.

Cultural-responsiveness, which considers how students' different cultures are reflected in communication, behavior, and engagement norms, can be incorporated into instructional methods. A culturally-responsive pedagogy can provide connections and affirmations about a student's family origins. Franklin Headley of Voice Charter Cultural-responsiveness, which considers how students' different cultures are reflected in communication, behavior, and engagement norms, can be incorporated into instructional methods. A culturally-responsive pedagogy can provide connections and affirmations about a student's family origins. Franklin Headley of Voice Charter School observed, "When we think about people 'other' than us, it makes us question our own identity too." At Voice Charter School, various subject areas provide opportunities to explore identity alongside academic objectives. Voice's Social Studies curricula examines world religions, and students and staff are encouraged to share experiences to be culturally responsive.⁵⁸



EXAMPLE FROM THE FIELD

Programs that Support Diversity and School Culture at Valor Collegiate Academies

Federal Charter School Program Grantee: Yes

Location: Nashville, Tennessee

Grades Served: 5-7, growing to 5-8

Student Enrollment: 740

Student Demographics, 2014-2015

- 40% White
- 17% Black
- 15% Hispanic/Latino
- 20% Middle Eastern/North African
- 8% Asian/Other
- 50% FRL eligible
- 24% English Learners

Valor Collegiate Academies integrates diversity into a variety of its schools' structures that support a positive school culture. The Valor schools use restorative justice as their discipline system. Restorative justice is a subset of restorative practices that focuses on intervention after a student has committed an offense. Valor schools have weekly instruction in social-emotional learning (SEL), referred to as a "compass" model, which challenges scholars to have "sharp minds, big

hearts, noble purpose, and aligned actions.” “Curiosity and diversity” are guiding principles of the sharp minds goal.⁵⁹

As part of the SEL and culturally-responsive instruction, students and staff undergo training on “cultural humility.” The schools use this frame, instead of the more commonly heard “cultural competency,” because the latter implies mastery over a culture that isn’t yours. Instead, cultural humility poses the challenge to recognize the bias or lack of understanding that one may have about some else’s culture and to approach the learning process with curiosity and respect. In addition, Valor leaders train students and staff on identity development. The identity instruction seeks to help each person recognize their biases and worldview. Instruction on how to form and nurture relationships, especially across lines of difference, is taught to students and staff in conjunction with identity development.⁶⁰

III: DESIGN PROCESSES TO A RECRUIT AND ENROLL A DIVERSE STUDENT BODY



The recruitment and admissions process is an important aspect of creating an intentionally diverse charter school. Although this can be complicated, there are several strategies intentionally diverse charter school leaders can use to enroll the student body they hope to serve.

In some traditional public schools, leaders who strive to create an intentionally diverse environment have historically done so through limiting which students are admitted. For example, some magnet schools have shaped their enrollment demographics by using admissions requirements—including tests scores—to select higher-performing students. However, charter schools, like most public schools, are generally open to all students and are not allowed to use admission requirements to choose their students.⁶¹

Intentionally diverse charter schools can employ a few strategies to design a recruitment and enrollment process with a broad applicant pool in mind. To establish and maintain diversity, school leaders should:

- Understand the likely enrollment that would occur in the absence of targeted recruitment strategies;
- Know the specific recruitment strategies that will help increase interest among the students the charter school hopes to attract;
- Determine what is most important to a broader set of families. This knowledge will guide leaders to refine their outreach and recruitment strategies, including communication styles, outreach activities, and marketing; and
- Aim to recruit a student body with a diversity of needs—like English Learner students and students with disabilities—in addition to diversity of race, culture, home languages, and income levels.⁶²

Parents with the most information use educational choice the most—typically parents with higher education and income levels.⁶³ Interviews with school leaders reveal that once an intentionally diverse school establishes a strong reputation in the community, wealthier families tend to apply in greater numbers.⁶⁴ This is especially true in communities with few high-quality public school options, where wealthier families have frequently sought out other educational choices that may not be affordable or practical for low-income families.⁶⁵ Therefore, intentionally diverse charter schools face the challenges of:

- Attracting more wealthy families who may have the resources to attend other educational options;
- Convincing parents to enroll their child in a school that may be in its planning phase or first year(s) of operation and does not yet have proven academic, enrichment, or extracurricular programs;
- Retaining families during early years of operation; and
- Maintaining a balance between students from low- and middle-income families:
 - If the school's reputation boosts applications among more affluent families;
 - If the demographics of the school's recruitment areas, such as the school's surrounding neighborhoods, significantly shift; or
 - If the school develops a reputation as the only high-quality school in the community.

Charter schools have tools available at the school, city, state, and federal levels to encourage applications and enrollment from a diverse set of families. According to Richard Kahlenberg, an expert on school integration efforts, and the school leaders interviewed for this toolkit, it is much easier for a school to create, implement, and maintain an effective diversity strategy than to try and change an already operational school toward diversity⁶⁶ Throughout his research and interviews with school leaders, Kahlenberg has found that to encourage diversity:

- It is easier for a school that is high-performing and serves predominantly middle-class families to attract lower-income families — although the school's location and transportation options may restrict low-income families' ability to enroll at these schools.
- It is easier for underserved families to access high-quality charter schools if enrollment obstacles are removed and support services are provided.
- It is easier to attract middle-class families to low-income schools if there are strong academic programs, skilled teaching staff, and enrichment programs.

There are recruitment strategies that charter school leaders can use to reach middle-class families. Information sessions can be held at the school or at community venues—such as coffee shops, grocery stores, and farmers' markets—at a variety of times. Scheduling these events in the early morning, evening, or on weekends helps to accommodate the schedules of people who work a standard 9:00 AM to 5:00 PM work day.⁶⁷ For example, Valor CMO leaders asked interested parents and prominent community members to host parties in their homes and invite their friends to learn about the school. During these gatherings, Valor CMO leaders gave a presentation about the school, families could ask questions and express concerns to school leaders, and potential Valor families could meet and learn more about each other.⁶⁸ DSST: GVR, Valor, and Voice charter schools all host open houses so that families can tour the school, meet teachers, and observe students in class.⁶⁹

School leaders can help make the application and enrollment process transparent by having a section on the school's website that explains the application process, highlights key dates in the process, and has online application forms that are accessible and available in multiple languages, including languages indicated by area demographics. A Valor parent said that she learned about the CMO when she heard a story on the radio about the schools. This led her to Valor's website, where she learned about an upcoming open house. She and her family attended the open house and then applied to the schools.⁷⁰

Leaders of an intentionally diverse charter school can take additional actions to reach underserved families who many have fewer resources and networks to learn about school choice options. School leaders should think through the possible barriers preventing families from applying to the charter school and what the school can do to reduce or eliminate these barriers. For example, underserved families are less likely to have home or high-speed internet service.⁷¹ A Brookings Institution report found that one in ten people living in the U.S. don't speak fluent English.⁷² Further, English proficiency is a strong predictor of low-income status and academic risk for immigrants—no matter what their educational level.⁷³ Since underserved families may face technology and language barriers to online and printed outreach in English, in-person recruitment efforts may be the most effective way to reach them. In-person recruitment efforts should include materials in multiple languages, bilingual school representatives, and access to translation services.

Some other questions to consider when thinking through recruitment, application, and enrollment challenges include:

- **Has the school communicated the application and enrollment processes widely and transparently?**
 - Has the school implemented a transparent, legal, and fair application process?
 - Has the school been transparent about what kind of lottery the school will hold if it receives more applications than its capacity for each grade level?
 - Has the school adequately reached out to underserved communities and families that lack traditional networks?
 - Has the school made marketing efforts in the community through:
 - Direct mailing of school brochures;
 - Creating marketing materials in multiple languages;
 - Door-to-door informational campaigns;
 - Informational sessions in community organizations;
 - Hosting school tours (for operating schools)?
- **Is the application form widely accessible?**
 - Is the application form available in multiple languages and in large print?
 - Is the application form offered along with translators to help non-English speaking families?
 - Is the application form available in hard copy for parents who do not have access to the internet?
 - Is the application form available in locations besides the school building?
 - Is the application form requesting information that could deter undocumented families (e.g., social security numbers) or homeless families (e.g., permanent address)?
- **Are there any school practices or policies that could deter families from applying?**
 - If uniforms are mandatory, are there stipends or scholarships to provide free or reduced-price uniforms?
 - Is parent participation overly burdensome? Would parents who work multiple jobs or non-traditional hours still be able to meet these requirements?

- Is the school’s approach to discipline and school culture supportive or punitive?
- **Is there a lack of services that could prevent families from applying?**
 - Does the school or local district provide or facilitate transportation options?
 - Does the school participate in the National School Lunch Program or provide other low-cost breakfast and lunch options?



EXAMPLE FROM THE FIELD

Recruitment Efforts at Voice Charter School

Voice Charter School direct mails every student in the district that is eligible for grades K–8. This means mailing materials to about 25,000 homes. The school receives about 2,000 applications as a result of this mailing outreach. The school also places ads in neighborhood newsletters and free non-English newspapers. These efforts help promote the school in multiple languages and communities. Voice does presentations about the school at community forums and has a booth at citywide student recruitment fairs. Voice has enrollment applications in English and Spanish. Through the New York City Department of Education, a translator is available via telephone. The school utilizes this service to support home language needs beyond English and Spanish.

Parents of students enrolled at the charter school can be a powerful “word of mouth” recruitment network. Providing parents with promotional materials and enrollment applications, in other languages as applicable, enables them to share information about the school with their networks—such as religious groups, cultural organizations, book clubs, or their children’s sports teams.⁷⁴ Parents sharing their experiences of the school spreads information across communities and SES levels. Parents who speak another language might also volunteer to help the school translate materials or act as translators for other families to give back to the school community.⁷⁵ School leaders can communicate through parent listservs and attend local school fairs to reach parents in the broader community.

When the school begins to receive enrollment applications, leaders can perform periodic analyses during the application period to assess the demographic composition of the application pool. School leaders can then conduct additional targeted outreach efforts to any underrepresented groups. Valor Collegiate Academies’ Director of Community Outreach estimated that she spent 90 percent of her time out in the community and 10 percent at the school during the planning year before the school opened.⁷⁶

In addition to reaching parents, school leaders can build partnerships with businesses, local institutions, service providers, and civic groups with strong community ties to recruit, raise awareness, and build credibility among various populations within the community. Charter schools may partner with faith-based organizations “so long as charter schools select partners without regard to their religious affiliation, ensure that no public funds are used for religious purposes, and do not engage in or encourage religious activity.”⁷⁷ A school may want to seek legal counsel to ensure partnerships with faith-based organizations follow all legal restrictions. Sometimes schools can leverage these partnerships to provide academic or enrichment programming. School leaders interviewed for this toolkit noted that building a strong reputation with community organizations

contributes to a “word of mouth” network because families trust school endorsements from community leaders.⁷⁸

It is important to begin with charter school basics when starting the relationship-building process with families and community-based organizations. There is often a public misunderstanding about charter schools, so having information ready (in multiple languages) that explains they are free, non-religious public schools of choice is a good starting place.⁷⁹ From there, school leaders share the school’s mission, educational offerings, and plans to serve the community. It is important to remember that the purpose of this community engagement is not just about marketing; it’s about developing relationships that enable schools to draw on the talents of the people in the community organizations. As relationships are formed, community organizations might allow the charter school to post informational and application materials on community bulletin boards, hold information sessions at their facility, provide enrichment activities, or host fundraisers for the school. Potential community organizations to partner with could include:

- Head Start and other pre-school and early childhood centers
- Health clinics
- Civic or cultural groups
- Churches, mosques, synagogues, and other faith-based organizations
- Cultural venues such as museums, theaters, arts spaces or workshops, or sportscenters
- Local businesses

Another tool that charter schools can consider to help enroll a diverse student body is a weighted lottery. For details on what is permissible in regards to conducting a weighted lottery, schools should consult their authorizer, State charter law, and their State Education Agency—especially if they are receiving or plan to apply for a federal Charter School Program (CSP) grant. Federal law stipulates that charter schools that receive CSP funds are required to hold a lottery, if they receive more applications for admission than can be accommodated. The Every Student Succeeds Act (ESSA) permits charter schools to receive CSP funding if they use a weighted lottery that aims to give slightly better chances of admission to all, or a subset of, “educationally disadvantaged students.”⁸⁰ This includes students from low-income families, students with disabilities, migrant students, English Learner students, neglected or delinquent students, and homeless students.⁸¹

There are policies at the city- and district-level that can improve a school’s ability to enroll a diverse student body. Intra- and inter-district integration efforts are well-researched and have shown positive results for students.⁸² Some integration proponents, including the Century Foundation, believe that charter school autonomy can be leveraged as an intra- and inter-district choice tool. Charter schools are well-positioned to enroll a diverse student body because they can draw enrollment outside of district attendance zones, depending on state law.⁸³

In recent years, some cities have moved toward a “portfolio” approach to educational options. A portfolio approach opens up choices to families across an entire city among district and charter schools.⁸⁴ The Center for Reinventing Public Education’s Portfolio Network includes 35 cities serving more than 4 million students, with the Tennessee Achievement School District, New Orleans Recovery School District, and the cities of Denver (CO), Grand Prairie (TX), and Lawrence (MA) rated as national exemplars for implementing collaborations among all public school models.⁸⁵ A comprehensive portfolio approach empowers parents with better data, along with a fair

and open process to choose the best public school option for their child. This portfolio approach presents families with an array of public school choices—traditional, magnet, and charter school—within the city. If a family lives within the city boundaries, the family can seek to enroll in any school in the city. In this way, families are not limited by attendance zones, like in traditional school assignments. Charter schools that are located in portfolio cities can therefore reach a wider applicant pool, which can be a great asset for schools with missions to serve students in diverse educational settings.

Like the portfolio approach, cities like Denver, New Orleans, Newark, and Washington, D.C. have created a city-wide enrollment system to make educational options more accessible to all families.⁸⁶ A unified enrollment system lets parents rank their school preferences among all city public schools in one application.⁸⁷ The unified enrollment system allows for all schools in the city to share resources that eliminate some of the application barriers for families (e.g., access to translators, as discussed above).

School leaders interested in creating intentionally diverse schools may be able to help promote unified enrollment systems by participating in their design or opting-in to existing systems. Unified enrollment systems are often voluntary, so school leaders can work with other leaders and community members to shape a system that encourages and enables diverse educational settings. School leaders can also include factors in their school's enrollment process, such as a sibling or neighborhood preference, in the unified enrollment system to support the school's diversity.

Unified enrollment also lessens a school's uncertainty about student matriculation because families get their notifications of school placement at the same time. This means that families do not withdraw their acceptance to one school because they later gained admission to a different school. For schools, this means more stability in student enrollment projections and budgeting, which is based on per-pupil funding. In turn, this may incentivize school leaders to advocate for or opt-in to enrollment systems. As more cities consider unified enrollment systems, perhaps these systems could include preferences of school diversity as an option for parents. Even in locations with a city-wide enrollment system, charter schools still need to invest time and resources in community engagement to attract families to apply to the school.



EXAMPLE FROM THE FIELD

Operating an Intentionally Diverse School in a City-wide Enrollment System at Denver School of Science and Technology: Green Valley Ranch High School

Federal Charter School Program Grantee: Yes

Location: Denver, Colorado

Grades Served: 9-12

Student Enrollment: 450

Student Demographics, 2014-2015

- 8% White
- 24% Black
- 53% Hispanic
- 10% Asian

- 5% Multiracial
- 67% FRL eligible
- 23% English Learners
- 8% Students with disabilities

Denver Public Schools (DPS) launched its city-wide enrollment program, SchoolChoice, in 2011–12 to “ensure equity, consistency and simplicity in school enrollment.” The Green Valley Ranch campus of DSST, a highly-regarded network of STEM schools, opened in 2012 and has always operated under the SchoolChoice system. The DSST network had positive “word of mouth” in the Denver metro area and proven academic success, so the DSST: GVR campus was oversubscribed and met its enrollment targets from the outset.⁸⁸

The DSST network has a positive working relationship with DPS, so it was able to negotiate that the DSST: GVR campus could have preferences in the SchoolChoice enrollment system for applicants with siblings already enrolled in the high school and for applicants from the school’s immediate neighborhood. Many siblings have been admitted to the school through the preference, thus limiting seats available for new families. However, the neighborhood preferences help DSST: GVR maintain a diverse student body. DSST: GVR accepts mid-year transfers if a student moves into the DPS district from another area.

The DSST network has recently focused on increasing the enrollment of English Learner students and students with disabilities to mirror DPS’s enrollment percentage. Meghan Janci, the Associate School Director of DSST: GVR, credits the “word of mouth” from parents of students with disabilities who share positive anecdotes of their child’s experiences at DSST among other parents in their social networks as the largest contributor to the school’s increased enrollment of students with disabilities.

IV: CREATE AND MAINTAIN A SCHOOL CULTURE THAT SUPPORTS AND VALUES DIVERSITY



Diversity should be infused in all aspects of an intentionally diverse school's model and practices. A school's staffing, training and professional development, school programming, family engagement, and classroom integration all contribute to a school culture that is designed to help students of all backgrounds thrive, feel they belong, and succeed. A comprehensive orientation also ensures that all students are not just attending, but thriving, in an intentionally diverse school.

SCHOOL STAFFING, TRAINING AND PROFESSIONAL DEVELOPMENT

School leaders should consider creating staff positions to manage community engagement, student and staff recruitment, staff diversity training, and related work. Charter school leaders might also want to include someone in this role on the leadership team. These diversity- and community-focused staff members should seek to understand the varied needs and priorities of students and families in the school community. Students and parents may differ substantially in communication style, expectations, and needs. Surveys of the school's staff, students, and parents are a valuable way to get insights and feedback on the experiences and perceptions of people within the school community. Survey results can guide the leader's adjustment of school offerings to meet the needs of the families it serves.⁸⁹

Surveys can be distributed online and in paper format and written in multiple languages to ensure accessibility for all families. Schools can also conduct focus groups. Focus groups encourage dialogue and let participants express feedback in real time. Franklin Headley of Voice Charter School found that focus groups with people from diverse backgrounds produce a rich conversation, and this format accommodates parents who are verbally fluent in English but lack written fluency.⁹⁰

Schools should strive to hire administrative and instructional staff with different life experiences and backgrounds, just as they seek to attract diverse students. When families see staff members who represent their own backgrounds, the school will gain credibility among all communities the school strives to serve. Research has suggested that teachers who identify as the same race or ethnicity as their students may set higher expectations for their academic achievement than teachers of a different race.⁹¹ While having instructional staff with backgrounds similar to that of their students may have academic benefits, school leaders should be mindful of the critical shortage of teachers of color in the United States. The National Center for Education Statistics found that throughout the U.S., 82 percent of public school teachers are White, 8 percent are Hispanic, 7 percent are Black, 2 percent are Asian, and 1 percent are multiracial.⁹² The U.S. Department of Education launched

a campaign in 2016 to raise awareness and share data about the racial disparities in the public educator field.⁹³

In many schools the proportion of teachers and school leadership who are people of color is less than the portion of students of color in the schools where they work. Increasing the representation of teachers and leaders of color is a frequent challenge for many public schools, charter and district-run. Intentionally diverse charter schools must be particularly creative and innovative in shaping their talent pipeline. When possible, schools can partner with local institutions to attract high-quality teaching and leadership candidates. Partners can include higher education institutions with teacher preparation programs, alternative teacher credentialing programs, and teacher and school leadership residency programs. The staff member leading diversity efforts or responsible for staff recruitment might also attend state and national minority teacher recruitment fairs to attract diverse teachers and leaders to the school.⁹⁴



EXAMPLE FROM THE FIELD

Minority Staff Recruitment Efforts at Valor Collegiate Academies and Voice Charter School

CMO leaders of Valor Collegiate Academies dedicate significant staffing and budget resources to meet their CMO and school staff diversity goals. More than 90 percent of public school educators in Tennessee are White, which is higher than the national average.⁹⁵ In the 2016–17 school year, the Valor CMO and schools have 25 percent staff members of color. The CMO has a goal to increase staff diversity by 5 percent each year until it reaches its target of maintaining 40 percent staff members of color.⁹⁶

Valor has a CMO staff member whose responsibilities include teacher recruitment. This staff member attends educator recruitment fairs throughout the country to promote the school. Valor CMO leaders budget \$20,000 per year to fly in high-quality teaching candidates of color. Once the teacher is onsite, school leaders get to know the candidate and see them interact with the school. The candidate can also learn about the school in-person.⁹⁷

Valor CMO leaders have also formed partnerships and pipelines to find high-quality teachers of color. Valor leaders initially formed a partnership with Vanderbilt University's Teacher Apprentice Program. However, the school leaders found that Vanderbilt was not producing enough candidates of color. In response, the CMO now works with five partners to expand its talent pipeline. In the 2016–17 school year, Valor schools have about 15 percent of their educators as apprentice teachers of color through the Nashville Teacher Residency program.⁹⁸

Franklin Headley of Voice Charter School acknowledges that minority teacher recruitment is challenging and extremely competitive. In New York City, charter schools face competition for talented minority candidates not only from other charter and traditional public schools, but also from other sectors that have diversity improvement goals, such as Wall Street. Leaders from Voice attend teacher and minority recruitment fairs, but since many of the other area charter schools attend as well, this has not been the most effective strategy.⁹⁹

Voice leaders have considered how other staff positions could be a source of diversity while still striving to increase the number of teachers of color, which in the 2016–17 school year comprise

about 10 percent of its instructional staff. Voice's leaders focused on its non-teaching administrative and operations staff as an area to increase the proportion of people of color working at the school. Voice leaders decided that a college degree is an unnecessary barrier for candidates from low-income backgrounds to apply to some entry-level positions, so they removed this standard requirement. Voice provides up to \$5,000 to subsidize undergraduate classes for employees who do not have a degree or certification and have worked at the school for one year. Voice leaders found that this approach to non-instructional positions has increased the overall diversity at the school, even though educator diversity in the classroom still lags.¹⁰⁰

Voice leaders have developed strong relationships with temp agencies to increase minority non-instructional staffing. Voice leaders take the time to convey exactly what the school is looking for in candidates. Voice's clear expectations and high placement rate from area temp agencies leads them to prioritize sending candidates that meet Voice's specifications. Voice leaders intentionally cycle candidates from the temp agencies through several different job positions to see if a candidate has natural talents that suit work they might not have tried before.¹⁰¹ Several placements from temp agencies have become permanent staff.¹⁰²

Having staff dedicated to diversity issues will ensure that all members of the school community have equal access to the administration, ability to participate in school programming, and opportunities to express any concerns. This community liaison role is especially impactful when filled by staff members whose backgrounds reflect those of the broader community. Some schools have designated community officers who help families navigate the application and enrollment processes and access school services. Some schools also have dedicated staff who work on community development that focuses on creating opportunities for families to interact, volunteer, use different communications channels to reach parents, and build networks. Staff who work with families can monitor data points—such as family retention rates, parent responses on surveys, and parental volunteering—as indicators of families' satisfaction with the school and its services. Staff with diversity roles can also be involved in creating, evaluating, and revising the student recruitment and application processes, described in the previous sections.

Training and professional development geared toward intentionally diverse charter schools benefits all schools. School staff can be trained to understand their own biases, including those related to race and equity.¹⁰³ School staff can also receive ongoing training and support on how to facilitate issue resolution among students from different backgrounds.¹⁰⁴ The school programming discussed in the next section can reinforce students' opportunities to find commonalities and learn to work together.

FAMILY ENGAGEMENT

An intentionally diverse school should explicitly recognize and celebrate differences, while also recognizing commonalities, among students. To do this, underserved students need social supports and services—just like underserved students in a high-poverty school. These supports include mental and physical health, such as access to food programs, healthcare options, counselors, and social workers. Valor CEO Todd Dickson noted that he does not see many budgetary obstacles to an intentionally diverse school model compared to other school models. In fact, Dickson says having a mix of SES levels might be a slight financial advantage because

resources can be allocated towards underserved students who may have faced traumas and have unmet needs resulting from poverty, while students from middle-income families may need less of these supports.¹⁰⁵ Offering advanced coursework, a breadth of enrichment opportunities, and other academic programs can attract middle-class families to the school.¹⁰⁶ Please refer to Section II for more school-design practices that appeal to families from various backgrounds. School leaders may find it challenging to address the wide array of student needs, but these support services provide benefits for all students regardless of their background.

Volunteer opportunities can bring middle and high school aged students together with a shared purpose to learn more about their community. Community partnerships, as discussed on page 22, can be a starting place for volunteering and community engagement opportunities. For example, a school can partner with a community organization to staff a soup kitchen. Volunteering provides a way for students to learn how to work together to accomplish a shared goal. Some leaders who incorporate volunteerism into their school model noted it also gives the school a presence in the community.¹⁰⁷ In turn, community members see students from the charter school contributing to their neighborhood. This makes community organizations more likely to help the school with recruitment efforts and share information about the school with others in the community.

Parents are another important part of the school community. Intentionally diverse charter schools need to thoughtfully engage parents of diverse backgrounds, while recognizing differing communication styles, scheduling constraints, and participation methods. School leaders should note that some parents may have work schedules that do not easily permit active involvement in the school. Or there may be language barriers similarly inhibiting their active involvement. Offering an array of events, at various days and times, in different formats can help more parents find opportunities that fit with their availability and capacity to participate. With all of this in mind, if a school has a Parent Teacher Organization (PTO), that group should schedule and structure meetings in a way that encourages interaction and engages as many parents as possible across the school community.



TOOLBOX TIP

Parent Engagement Opportunities

- If the school draws students from multiple districts or zip codes within a city, parents from different districts or zip codes could co-lead each PTO meeting. This would allow the school staff and attending families to hear different perspectives from the school community.¹⁰⁸
- Schools might consider facilitating afterschool opportunities for families to interact with each other. This could include teachers leading small groups of students and parents from different backgrounds on weekend excursions or afternoon enrichment activities.
- Parents may want to consider having liaisons to school groups for parents who are not able to attend meetings in person due to scheduling, child care, or transportation constraints.
- The school could also setup weekend play dates at a central location for families living in different areas of town.
- Morning “coffee with the principal” sessions can be scheduled before the school day starts. These regular sessions are an opportunity for parents to learn more about what is happening

at the school, hear about upcoming events, learn of opportunities to volunteer, and ask questions. Holding an event early in the morning tends to appeal to middle-income parents because it enables families to drop their student off at the school and have time to attend the meeting before the start of a standard 9am to 5pm work day.¹⁰⁹

- Cultural events held during the school day, afterschool, or on weekends are another way to encourage families from different backgrounds to share their heritage.¹¹⁰
 - Valor school leaders held an event in December with students, parents, and instructional staff where parents from different faith traditions shared stories about their winter holiday practices. The format of the event was structured similarly to a core component of the school's social-emotional learning program so that parents learned more about what their children practice in school.¹¹¹
- Food-related activities are a popular way for students and parents to learn about and experience each other's culture.
 - Voice parents run a "Parade of Nations" at the school. There are tables to represent each continent, and parents bring in food and share stories and information about countries in that continent. Students bring a "passport" and get stamps at each table they visit. This event is a way to publicly celebrate diversity and invite the community into the school.¹¹²

CLASSROOM INTEGRATION

School leaders can take steps to ensure that the school's overall diversity is also reflected at the classroom level. Rethinking or avoiding tracking, which separates students by achievement levels, and proactively employing academic supports like targeted remediation and mentoring, will foster integration within classrooms. Although differentiated instruction requires strong structures and preparation to be successful, there are ways to incorporate the needs of EL students, students with disabilities, and students seeking advanced coursework within the same classroom. For example, if a school builds in flexible instructional periods, a science writing class could be an enrichment opportunity for students who excel in science and a chance for students who are struggling in writing to get extra support. Schools that differentiate instruction often rely on frequent interim assessments for all students, not just those who are receiving interventions, to monitor progress across all students' levels and needs.¹¹³ Formal and interim assessment data can be coupled with student surveys that ask questions about students' experience of academic programs and the diversity school culture.¹¹⁴

Full inclusion for students who receive English language instruction and students with disabilities is one way to increase in-classroom diversity. Schools could consider educating all students together for academic courses and providing targeted pull-out instruction for English Language learners and students with disabilities during non-academic time. Students who want to take honors or advanced coursework can receive general classroom instruction and complete additional assignments for advanced credit. This embedded honors model enables struggling learners to benefit from informal observations of the vocabulary and study habits of higher-performing students.¹¹⁵



EXAMPLE FROM THE FIELD

Supporting Diverse Learners at Valor Collegiate Academies

Valor school leaders and teachers structure the classroom toward full inclusion whenever possible. Students who perform below grade level receive intensive targeted instruction through push-in and pull-out remediation during their 5th and 6th grade years, as needed. The goal is to close the preparation gap to a level where teachers can effectively differentiate instruction while addressing student needs in the general classroom. If the remediation is successful, students are educated in the general classroom, with small group instruction and push-in supports, as necessary, during their 7th and 8th grade years.

This strategy has been particularly effective with EL students, who represent 24 percent of Valor schools' student body. Valor schools had the highest academic results in 2014-15 for EL students among Metro Nashville Public Schools.¹¹⁶

CONCLUSION



There is a growing number of intentionally diverse charter schools in the United States. The NCSRC has drawn lessons from research on school diversity efforts and the work of charter school leaders focused on diversity to help other school leaders who are just beginning this challenging work. Charter school leaders committed to opening diverse schools, or those trying to increase student diversity, must understand numerous factors. This includes how to measure and target diversity, what attracts parents of different backgrounds, how to retain these families, how to make diversity meaningful at the schoolwide and individual classroom levels, and how to help all students thrive in their school.

It is our hope that this toolkit will help charter school leaders who are opening a school that explicitly seeks to serve a diverse student body, or leaders who are operating a charter school with a different mission but want to increase student diversity, to recognize the benefits and plan for the challenges on the path toward diverse educational settings. Serving students and families from different backgrounds takes great thoughtfulness, intentionality, and careful progress monitoring, and there are great academic, social, and long-term benefits for students educated in diverse settings. Operating intentionally diverse charter schools is one model within the charter school sector that focuses on fostering, recognizing, and celebrating diversity to increase student learning and achievement.

Please contact the NCSRC with questions at NCSRC@safalpartners.com.

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ENDNOTES

¹ In 25 percent of all public schools, more than 75 percent of the students are eligible for free and reduced-price lunch (FRL), a common measure of poverty. Twenty-four percent of traditional public schools have more than 75 percent of their students eligible for FRL, whereas 39 percent of charter schools have such high concentrations. Source: U.S. Department of Education, National Center for Education Statistics. "Characteristics of Traditional Public and Public Charter Schools." Available at https://nces.ed.gov/programs/coe/pdf/coe_cla.pdf.

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Sample Statement of Work - Outreach Consultant

ORGANIZATIONS	
CLIENT Organization	Hobgood Charter School
CLIENT Contact	Juliana Harris
CLIENT Email	jharris@hobgoodcharterschool.org
PROVIDER Organization	TBD
PROVIDER Contact	TBD
PROVIDER Email	TBD
START DATE	TBD

OVERVIEW	
Estimated Hours	200 hours in each project year
Services to be Rendered	Community Outreach & Marketing

DESCRIPTION
Provider must be willing to provide the following services to assist the school in marketing to a broader community and, ultimately, recruiting a more diverse student population.

SERVICES	
DESCRIPTION	Estimated Hours Per Year
Schedule and facilitate at least 5 community-based school information events	35
Oversee the development and distribution of new school-specific marketing materials	50
Attend community events with HCS administration and staff	10
Assist with partnership development efforts	15
Manage marketing and outreach events, including those targeted to families where English may be a second language.	30
Advise the HCS Board and administration on new marketing/outreach campaigns	40
Provide consultation on strategies for improving school's online presence	20
TOTAL	200

TERMS / CONDITIONS
MILEAGE / TRAVEL / EXPENSES
Contractor is responsible for all travel-related costs.
OWNERSHIP OF CONTRACT PRODUCTS
HCS will retain ownership of all work and materials created on its behalf.
TERMINATION
Once executed, this contract may be terminated at any point with proper notice (30 days). Payment will be prorated based on completed work.

AUTHORIZATION

CLIENT SIGNATURE

CLIENT PRINTED NAME

CLIENT DATE

PROVIDER SIGNATURE

PROVIDER PRINTED NAME

PROVIDER DATE



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COLORADO CHARTER SCHOOL

Sample Closure Framework

January 2011



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Achievement



BUILDING CHARTER
SCHOOL QUALITY

Funding for this project was provided by the U.S. Department of Education's Office of Innovation and Improvement as part of a National Activities Leadership Grant (Grant # U282N060030) for Building Charter School Quality: Strengthening Performance Management Among Schools, Authorizers, State Charter Support Organizations, and Funders.

Colorado Charter School Sample Closure Framework

January 2011

Background

This Sample Closure Framework provides a Colorado-specific guide to charter school closure, complementing the Colorado Charter School Standard Application, Checklist, and Review Rubric, A Resource for Developing Charter School Contracts, and Colorado Sample Contract Language and Attachments. All of these documents are a product of a collaborative initiative of the Colorado Department of Education, the Colorado League of Charter Schools, and the Colorado Charter School Institute, and are available at www.charterschoolquality.org.

This Framework benefits from review by authorizers and charter schools. Additional feedback from authorizers and schools will be gathered over time to improve this document to ensure it continues to reflect best authorizing practices in Colorado.

This work is part of a larger four-year project entitled, "Building Charter School Quality: Strengthening Performance Management among Schools, Authorizers, State Charter Support Organizations and Funders," which was supported by a National Activities grant from the U.S. Department of Education.

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Introduction

Closing a charter school can present many challenges, given the data that must be compiled and analyzed, public meetings that must be held, and the political considerations that must be addressed before a charter school chooses to voluntarily close or before the authorizer votes to not renew or to revoke the charter school contract.

Given the challenges, a carefully developed, detailed school closure plan is a high priority. An orderly closure process providing for continuity of instruction until the closure date, identifying new school options for students, and meeting the school's financial, legal, and operational obligations is in the best interest of all parties. This Colorado-specific checklist of tasks in a template format was developed to assist authorizers and charter schools with the closure process.

This document draws heavily on several sources:

1. *Accountability in Action: A Comprehensive Guide to Charter School Closure*. Edited by Kim Wechtenhiser, Andrew Wade, and Margaret Lin. National Association of Charter School Authorizers (2010).
2. Colorado Charter School Institute Closure Project Plan (2010).
3. *Charter Renewal*. Charter Schools Institute, The State University of New York (SUNY).
4. *Pre-Opening Checklist and Closing Checklist*. Office of Education Innovation, Office of the Mayor, City of Indianapolis.
5. *2010-2011 Charter Renewal Guidelines*. District of Columbia Public Charter School Board.

Colorado charter school authorizers were helpful in reviewing this document to enhance usability and completeness. Additional feedback from authorizers and charter schools will be gathered over time to improve this document to ensure it continues to reflect best Colorado authorizing practices.

Background

Whenever a charter school closes, there are many tasks that must be completed; however, the tasks associated with the winding up of business will be different for each authorizer and charter school, reflecting the circumstances surrounding the closure.

These circumstances include the following:

1. Timing of closure – during or at the end of a school year.
2. Reasons for closure – for example, financial mismanagement, student performance, or lack of enrollment.
3. Charter school capacity – the extent to which the charter school can accomplish the tasks associated with closure.
4. Relationship of the parties – can the authorizer and the school work together cooperatively to close the school?
5. Expectation of closure – whether the authorizer and charter school expected and planned for the closure.
6. Appeals and legal action – the time period before a final decision is reached on closure.
7. Student reassignment – the availability of space, school options, and impact on school districts that will be receiving students.

The circumstances outlined above will be affected by whether or not the closure is voluntary. Voluntary closure typically occur when either the school does not seek renewal of its charter or when the school recognizes that it is no longer academically or financially viable. Involuntary closure may occur when a charter renewal application is denied, but may also be precipitated by charter revocation due to a financial crisis or persistent low academic achievement. In such circumstances, the school and authorizer may have genuine disagreements about the school's performance. In other cases a charter school may believe that renewal is pro forma, ignoring the accountability-for-autonomy agreement that is the foundation of the charter school contract. In these circumstances, closure is unexpected in addition to being involuntary.

In rare circumstances, an involuntary closure may be preceded by an authorizer requesting that the Commissioner of Education invoke the Emergency Powers Act (C.R.S. 22-30.5-701 et seq.) In this case, closure is usually related to financial mismanagement, a threat to district or school property, and/or student safety. An involuntary closure, and especially one where the Emergency Powers Act has been invoked, is likely to present the authorizer with many more difficulties than a voluntary closure.

When the charter school closure is involuntary, an appeal of the decision to the State Board of Education is likely. The appeal process may add up to 90 days before a final decision on closure is reached (30 days to file an appeal and 60 days for the State Board to hear the appeal and make its findings). In rare cases, a second appeal could precede closure. This could result in an additional 90 days before a final decision (30 days for the local board to reconsider its decision and make a final decision, 30 days to file an appeal, and 30 days for the State Board to make a decision) (C.R.S. 22-30.5-108). In any case, an authorizer will need to have contingency plans to address the various scenarios that may occur.

Regardless of how the process unfolds, the authorizer's staff should meet with the charter school board and principal immediately after the initial closure decision to determine who will send letters to the school districts that are materially affected and to the school's parents notifying them of the decision. Ideally, all parties will agree on the content of the letters. Additional letters should be sent to parents and school districts updating them about the timing and outcome of any appeals.

Whether or not closure is scheduled during or after the school year is a key factor in developing the closure plan. An end-of-year closure is almost always in students’ best academic and social interests; in addition, it simplifies the financial issues associated with the closure. In the event that the school is unable to operate until the end of the school year, the authorizer will need to consider whether its best interest is served by continuing to operate a school in the charter school facility until a smooth transition is possible.

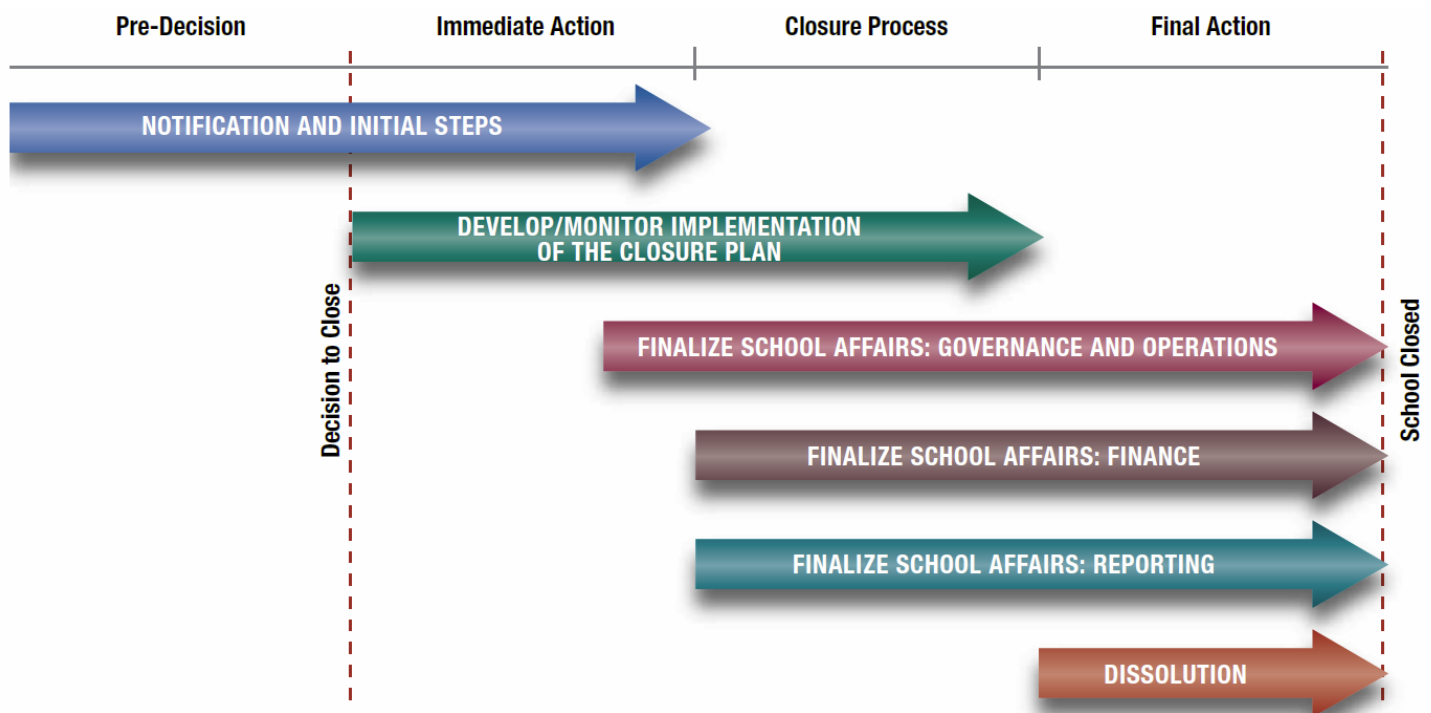
Regardless of the specifics of the closure plan, there are three primary goals to be accomplished in the winding up of the school’s affairs:

1. Providing educational services in accordance with the charter contract until the end of the school year, or the agreed upon date when instruction will stop.
2. Reassigning students to schools that meet their educational needs.
3. Addressing the school’s financial, legal and reporting obligations.

These goals should be given the highest priority during the closure process.

Based on the circumstances surrounding the closure, not all tasks in this framework may apply. The authorizer and charter school should meet prior to starting closure proceedings and agree which tasks will be necessary and how the authorizer wants to superintend the closure. During this meeting, responsible parties and completion dates should be agreed upon to ensure a transparent and smooth closure. The closure process has many tasks, which are illustrated in the chart below: 1) notification to affected school districts and families; 2) developing and monitoring the closure plan; 3) winding up the school’s affairs in governance and operations, finance, and reporting; and 4) dissolution. The template that follows includes the basic tasks that will usually need to be addressed to close a school; the format allows for the insertion of responsible parties and dates of completion.

A Conceptual Timeline for Closure



Notification and Initial Steps

The following checklists can be downloaded at www.charterschoolquality.org > Publications & Tools > Authorizers.

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Notify Parents / Guardians of Closure Decision Within one day of the authorizer’s decision to close the charter school, authorizer staff and charter staff/board collaborate to ensure that parents / guardians are notified regarding the closure decision. Such notification includes:</p> <ol style="list-style-type: none"> 1. If applicable, an explanation of the process for an appeal to the Colorado State Board of Education and possible litigation including the implications for families. 2. Assurance that instruction will continue through the end of the school year or the date when instruction will cease. 3. Assurance that after a final decision is reached, parents/students will be assisted in the reassignment process. 4. FAQ about the charter closure process. 5. Contact information for parents/guardians with questions. 			
<p>Notify School Districts Materially Impacted Within two days of the authorizer’s decision to close the charter school, notify districts materially impacted by the closure decision, including:</p> <ol style="list-style-type: none"> 1. Possible appeals and timeline for final decision. 2. Copy of the letter sent to parents. 3. Closure FAQ. 4. Information about the plan being developed to ensure an orderly closure process.. 5. Contact information for questions. 			
<p>Review Budget</p> <ol style="list-style-type: none"> 1. Review budget to ensure that funds are sufficient to operate the school through the end of the school year, if applicable. 2. Emphasize the legal requirement to limit expenditures to only those in the approved budget, while delaying approved expenditures that might no longer be necessary until a revised budget is approved. 3. Acknowledge that there are unique expenditures associated with closure for both the authorizer and school and that the parties will meet to identify these expenditures and funding sources. 4. Ensure that the school continues to collect revenues included in the school’s budget, if applicable. 			
<p>Meet with Charter School Faculty and Staff Principal and charter board chair meet with the faculty and staff to:</p> <ol style="list-style-type: none"> 1. Discuss reasons for closure, the status of appeals/legal action and likely timeline for a final decision. 2. Emphasize importance of maintaining continuity of instruction through the end of the school year. 3. Discuss plans for helping students find new schools. 4. Identify date when last salary check will be issued, when benefits terminate, and last day of work. 5. Describe assistance, if any, that will be provided to faculty and staff to find new positions. 			
<p>Send Additional and Final Notifications Notify parents and affected school districts in writing after key events (e.g., denial of an appeal) and when the closure decision is final. In the letter to parents after the closure decision is final, include:</p> <ol style="list-style-type: none"> 1. The last day of instruction. 2. Any end-of-the-year activities that are planned to make the transition easier for parents and students. 3. Assistance that will be provided to families in identifying new schools. This may include a list of school options, choice fairs, individual meetings with families, and prospective school visitations. 			

Develop/Monitor Implementation of the Closure Plan

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Establish Transition Team, Develop Closure Plan, and Assign Roles</p> <p>Transition team includes:</p> <ol style="list-style-type: none"> 1. Lead person from authorizer staff. 2. Charter school board chair. 3. Lead administrator from the charter school. 4. Lead finance person from the charter school. <p>Develop plan, exchange contact information and assign roles.</p>			
<p>Establish a Schedule for Meetings and Interim Status Reports</p> <p>Agree on a meeting schedule to review progress and interim, written status reports to include:</p> <ol style="list-style-type: none"> 1. Reassignment of students. 2. Return or distribution of assets. 3. Transfer of student records. 4. Notification to entities doing business with the school. 5. The status of the school's finances. 6. Submission of all required reports and data to the authorizer and/or state. 			
<p>Submit Final Report</p> <p>Submit a final report to the authorizer detailing completion of the closure plan.</p>			

Finalize School Affairs: Governance and Operations

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Maintain Identifiable Location Maintain the school’s current location through the winding up of its affairs or relocate its business records and remaining assets to a location with operational telephone service that has voice message capability.</p>			
<p>Notify Commercial Lenders / Bond Holders Within 10 days after the final decision on the charter school closure and after all appeals have been exhausted, notify banks, bond holders, etc., of the school’s closure and a likely date as to when an event of default will occur as well as the projected date of the last payment by the school toward its debt.</p>			
<p>Terminate EMO /CMO Agreement (if applicable) Review the management agreement and take steps needed to terminate the agreement at the end of the school year or when the charter contract expires.</p> <ol style="list-style-type: none"> 1. The management company should be asked for a final invoice and accounting, including an accounting of any retained school funds and the status of grant funds. 2. The school and the management company should agree upon how the company will continue to provide educational services until the last day of instruction. 3. The school and the management company agree when other services including business services will end. 			
<p>Protect School Assets Protect the school’s assets and any assets in the school that belong to others against theft, misappropriation and deterioration.</p> <ol style="list-style-type: none"> 1. Maintain existing insurance coverage on assets, including facility and vehicles, until the disposal of such assets in accordance with the closure plan. 2. Negotiate school facility insurance with entities that may take possession of school facility – lenders, mortgagors, bond holders, etc. 3. Obtain or maintain appropriate security services. Action may include moving assets to secure storage after closure or loss of facility. 			
<p>Maintain Corporate Records Maintain all corporate records related to:</p> <ol style="list-style-type: none"> 1. Loans, bonds, mortgages and other financing. 2. Contracts. 3. Leases. 4. Assets and asset distribution. 5. Grants -- records relating to federal grants must be kept in accordance with 34 CFR 80.42. 6. Governance (minutes, bylaws, policies). 7. Employees (background checks, personnel files). 8. Accounting/audit, taxes and tax status, etc. 9. Personnel. 10. Employee benefit programs and benefits. 11. Any other items listed in the closure plan. <p>Determine where records will be stored after dissolution.</p>			

Finalize School Affairs: Governance and Operations (continued)

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Notify Employees and Benefit Providers Formally notify all employees of termination of employment at least 60 days before closure to include date of termination of all benefits in accordance with applicable law and regulations (i.e. COBRA) and eligibility for Colorado Unemployment Insurance pursuant to any regulations of the Colorado Department of Labor. Notify benefit providers of pending termination of all employees, to include:</p> <ol style="list-style-type: none"> 1. Medical, dental, vision plans. 2. Life insurance. 3. Cafeteria plans. 4. 403(b), retirement plans. 5. PERA. <p>Consult legal counsel as specific rules and regulations may apply to such programs.</p>			
<p>Notify Contractors and Terminate Contracts</p> <ol style="list-style-type: none"> 1. Notify all contractors of school closure. 2. Retain records of past contracts and payments. 3. Terminate contracts for goods and services as of the last date such goods or services will be needed. 			
<p>Transfer Student Records and Testing Material Send student records, including final grades and evaluations, to the authorizer, including:</p> <ol style="list-style-type: none"> 1. Individual Education Programs (IEPs) and all records regarding special education and supplemental services. 2. Student health / immunization records. 3. Attendance record. 4. Any testing materials required to be maintained by the school. 5. Student transcripts and report cards. 6. All other student records. <p>Document the transfer of records to include:</p> <ol style="list-style-type: none"> 1. The number of general and special education records transferred. 2. Date of transfer. 3. Signature and printed name of the charter school representative releasing the records. 4. Signature and printed name of the authorizer's representative who receives the records. 			
<p>Inventory assets Inventory school assets, and identify items:</p> <ol style="list-style-type: none"> 1. Loaned from other entities. 2. Encumbered by the terms of a contingent gift, grant or donation, or a security interest. 3. Belonging to the EMO/CMO, if applicable, or other contractors. 4. Purchased with federal grants (dispose of such assets in accordance with federal regulations). 5. Purchased with Public Charter School Program startup funds (transfer assets to another charter school within the district or state). <p>Return assets not belonging to school where appropriate documentation exists. Keep records of assets returned.</p>			
<p>Notify Food and Transportation Services and Cancel Contracts Cancel school district or private food and/or transportation services for summer school and the next school year.</p>			

Finalize School Affairs: Finance

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Review and Revise School Budget</p> <ol style="list-style-type: none"> Review the school’s budget and overall financial condition. Make revisions that take into account closure and associated expenses while prioritizing continuity of instruction. Identify acceptable use of reserve funds. 			
<p>Maintain IR S 501(c)(3) Status Maintain IRS 501(c)(3) status, including:</p> <ol style="list-style-type: none"> Notify IRS regarding any address change. File required tax returns and reports. 			
<p>Notify Funding Sources / Charitable Partners Notify all funding sources, including charitable partners of school closure. Notify state and federal agencies overseeing the school’s grants that the school will be closing.</p>			
<p>List all Creditors and Debtors Formulate a list of creditors and debtors and any amounts accrued and unpaid with respect to such creditor or debtor.</p> <ol style="list-style-type: none"> This list is not the same as the contractor list, above, but may include contractors. Creditors include lenders, mortgage holders, bond holders, equipment suppliers, service providers and secured and unsecured creditors. A UCC search should be performed to identify secured creditors. Debtors include persons who owe the school fees or credits, any lessees or sub-lessees of the school, and any person holding property of the school. 			
<p>Notify Creditors Notify all creditors of the school’s closure and request a final bill.</p>			
<p>Notify Debtors Contact all debtors and request payment.</p>			
<p>Determine PER A Obligations Contact PERA to determine remaining liabilities for employee retirement program.</p>			
<p>Itemize Financials Review, prepare and make available the following:</p> <ol style="list-style-type: none"> Fiscal year-end financial statements. Cash analysis. Bank statements for the year, investments, payables, unused checks, petty cash, bank accounts, and payroll reports including taxes. <p>Collect and void all unused checks and destroy all credit and debit cards. Close accounts after transactions have cleared.</p>			
<p>Close Out All State and Federal Grants Close out state, federal, and other grants. This includes filing any required expenditure reports or receipts and any required program reports, including disposition of grant assets.</p>			
<p>Prepare Final Financial Statement Retain an independent accountant to prepare a final statement of the status of all contracts and other obligations of the school, and all funds owed to the school, showing:</p> <ol style="list-style-type: none"> All assets and the value and location thereof. Each remaining creditor and amounts owed. Statement that all debts have been collected or that good faith efforts have been made to collect same. Each remaining debtor and the amounts owed. 			

Finalize School Affairs: Finance (continued)

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Complete Final Financial Audit Complete a financial audit of the school in accordance with the Charter Schools Act by a date to be determined by the authorizer.</p>			
<p>Reconcile with Authorizer Reconcile authorizer billings and payments, including special education payments or other “lagged” payments. If the school owes the authorizer money, it should list the authorizer as a creditor and treat it accordingly.</p>			

Finalize School Affairs: Reporting

Description of Required Actions	Responsible Party	Completion Date	Status
Prepare End-of-Year Reports Prepare and submit all required end-of-year reports to the authorizer.			
Prepare Final Report Cards and Student Records Notice Provide parents / guardians with copies of final report cards and notice of where student records will be sent along with contact information.			

Dissolution

Description of Required Actions	Responsible Party	Completion Date	Status
<p>Dissolve the Charter School</p> <ol style="list-style-type: none"> The charter school board adopts a resolution to dissolve that indicates to whom the assets of the non-profit corporation will be distributed after all creditors have been paid. Unless otherwise provided in the bylaws, the members (if any) or board votes on the resolution to dissolve. A non-profit corporation is dissolved upon the effective date of its articles of dissolution. (C.R.S. 7-134-103). 			
<p>Notify the Secretary of State</p> <p>After the resolution to dissolve is authorized, dissolve the corporation by delivering to the Secretary of State for filing articles of dissolution setting forth:</p> <ol style="list-style-type: none"> The name of the non-profit corporation. The address of the non-profit corporation’s principal office. The date dissolution was authorized. If dissolution was authorized by the directors, a statement to that effect. If dissolution was approved by the members, a statement of the number of votes cast for the proposal to dissolve. Such additional information as the Secretary of State determines is necessary or appropriate. 			
<p>Notify Known Claimants</p> <p>Give written notice of the dissolution to known claimants within 90 days after the effective date of the dissolution.</p>			
<p>End Corporate Existence</p> <p>A dissolved non-profit corporation continues its corporate existence, but may not carry on any activities except as is appropriate to wind up and liquidate its affairs, including:</p> <ol style="list-style-type: none"> Collecting its assets. Transferring, subject to any contractual or legal requirements, its assets as provided in or authorized by its articles of incorporation or bylaws. Discharging or making provision for discharging its liabilities. Doing every other act necessary to wind up and liquidate its assets and affairs. (C.R.S. 7-134-105). 			
<p>Notify IRS</p> <p>Notify the IRS of dissolution of the education corporation and its 501(c)(3) status and furnish a copy to the authorizer.</p>			

Sample Item List

Computers Lab Computers

ThinkCentre Tiny-in-One 22Gen3
ThinkCentre Tiny-in-One 22Gen3Touch
Think Centre M720q

Staff Computers

HP - Pavilion x360 2-in-1 14" Touch-Screen Laptop - Intel Core i5 - 8GB Memory - 256GB SSD + 16GB Optane

Front Office Furniture

L-Shaped Office Desk w/ R Return & Keyboard tray
Contemporary Office Storage Credenza
School Office Locking Storage Credenza
Edge Banded Bookcase 5/8" Sides 1" Shelves 3'Wx6'H
Triple Unit Reception Station
Four Piece Reception Seating Set

Classroom Furniture

72" Crescent Tables and Chairs
4700 Kaleidoscope Triangle Student Desk
Multi-Section Storage with Clear Trays
Double-Pedestal Desk
Birch Bookcases

Computer Lab Furniture

LX Gray Computer Workstation 72"W x 24"D x 29"H

Google Expeditions

Google Expeditions VR Classroom Kit 10 Student Pack (Rolling Case and Router)

Classroom-Level Instructional Technology

3,600 lumens color brightness wireless HDMI MHL 3LCD projector
Model LX-1 Visual Presenter
Compact Wireless Monochrome Laser All-In-One Printer, Scanner, Copier, Fax
IPEVO V4K Ultra High Definition USB Document Camera

School Library/Media Center Furniture

Revolving Multi Media Display
Wood Library Shelving - Double-Face
Mobile Welcome Desk

Classroom-Level Consumables

Pencils
Pens

Printer Paper

Toner

Testing Materials/Workbooks



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

FPG CHILD DEVELOPMENT INSTITUTE
SHERYL-MAR NORTH
CAMPUS BOX 8040
CHAPEL HILL, NC 27599-8040
www.firstschool.us

2-24-20

NC ACCESS Program
NC Dept of Public Instruction

I am writing in support of the application for the NC ACCESS Grant for Hobgood Charter School. I have had the opportunity to supervise, mentor, and partner with Juliana Harris, principal of HCS, throughout the past eleven years in the context of a variety of PreK-3 reform projects. I am the director of a 14-year initiative called FirstSchool, out of the FPG Child Development Institute at UNC Chapel Hill. Our work is aimed at uniting the best of early childhood, elementary and special education to improve the school experiences of young children, especially children of color, and those who live in poverty. We have worked in states, districts, and schools throughout the nation in grades prek through high school. Central to our work is engagement in collaborative inquiry and using classroom observation data to examine practice, make changes and monitor progress.

Ms. Harris stands out consistently as a leader who is truly in pursuit of continuous growth. She takes seriously her access to research and data and looks for ways to apply knowledge and learning to classroom, school, and district practice. She is notably articulate about intentionality in curriculum and instruction, and as both a teacher and administrator, is a strong and knowledgeable advocate for the developmental needs of young children. Integral to our work are the complicated issues of seamless education across the PreK-3rd grade age span, getting schools ready for the children whom they serve in very real and culturally relevant ways, moving from a climate of evaluation to one of inquiry, and to bringing knowledge of developmental science into classroom practice and policy. Ms. Harris is more than conversant in all of these areas and will be a strong leader and contributor to intelligent discourse and application of these issues at Hobgood Charter School.

The HCS application details a commitment to partnering with FirstSchool and our ability to provide onsite professional development, coaching and consultation on strategies and best practices for serving diverse and disadvantaged students. Additionally they plan to use our observation measure called EduSnap which provides teachers with an in-depth picture of the minute by minute experiences of children in their classrooms, helping them examine children's exposure to a variety of activity settings, teaching approaches and instructional practices. This tool promotes inquiry into practice and will 1.) inform the school's professional development program and 2.) provide teachers with formative data they can use to modify their classroom instruction to better meet the needs of the target population of students. I will be honored to partner with HCS to support staff development and the pursuit of increased understanding of educating students from minority and economically disadvantaged groups, and boys of color, and using data to improve practice.

Ms. Harris's past work, and her current commitment is in clear keeping for the NC ACCESS goals of increasing racial and ethnic diversity, teacher support for more effectively meeting the needs of educationally and economically disadvantaged students, and engaging teachers in a culture of collaborative inquiry with a focus on continuous improvement.

I fully support this application and know that your investment in Mrs. Harris, Hobgood Charter School, and their joint vision will be money and time well spent.

Sharon Ritchie Ed.D
Senior Scientist
FPG Child Dev. Inst
UNC Chapel Hill

SCHOOL CULTURE PROPOSAL

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

Here at Learning for Living we understand how important it is that students and staff are successful academically and relationally. Our goal is to work with your team to EDUCATE adults on how to build thriving school culture, EQUIP them with the tools they need to build healthy relationships, and EMPOWER them to design the school where everyone can say; **I belong here, I am safe here, and I can grow here.**

Our Core Philosophy:

The work we do is based on our Culture Pyramid, where the base is relationships. We believe if staff is given time to get to know each other on the human level,

they will begin to trust one another. Trust

leads to higher levels of engagement, the ability to have courageous conversations, and ultimately success in helping students reach their full potential.

In this phase of partnering, we highly recommend focused work on the relationships across staff members through a Professional Development experience.



CULTURE PLAN

YEAR ONE:

SCHOOL CULTURE PROFESSIONAL DEVELOPMENT: MODULE ONE

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

Fee: \$5,500

YEAR TWO:

SCHOOL CULTURE PROFESSIONAL DEVELOPMENT: MODULE TWO

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

Fee: \$5,500

PROFESSIONAL DEVELOPMENT SAMPLE AGENDA

Module One: 6 hour program

8:30am - 10:00am - Opening & Building Community

The day will kick-off with a reminder that everyone person on campus has the ability to help build a great school culture. The facilitator will introduce the Culture Pyramid and talk about the power of relationships and trust as the foundation. After this brief presentation, the facilitator will launch into a variety of playful, yet purposeful community building activities that are low risk in nature and provide easy ways for staff members to get to know their peers.

10:00am - 10:15am - Break

10:15am - 12:00pm - Using trust to grow as a staff

Trust happens when people know one another's story and have history. This portion of the day will provide opportunities for staff members to get to share more about their story and learn about those around them in 1:1 and deeper small group conversations.

12:00pm - 12:45pm - Lunch

12:45 - 2:45pm - Building Engagement

Once staff members feel they can trust one another, they are willing to leave their silos and begin to engage with peers in deeper ways. The facilitator challenges your team to consider what might happen to your culture if each member were to improve by 1%. It is a powerful and encouraging way to end the experience.





What clients are saying

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

- Teacher at Monte Vista High School, California

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

- Principal, Palo Alto, California

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

- Assistant Principal, Bentonville, Arkansas

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

- Superintendent, Eureka Union School District, California



Hobgood Charter School

2019-2020 School Calendar

July 2019						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

August 2019						
Su	M	Tu	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September 2019						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October 2019						
Su	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November 2019						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December 2019						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January 2020						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February 2020						
Su	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

March 2020						
Su	M	Tu	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April 2020						
Su	M	Tu	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May 2020						
Su	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2020						
Su	M	Tu	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

- Holidays
- Annual Leave Day
- Early Release Day
12:00 Dismissal
- First and Last Day of School
*Last day is Early Release
- Optional Workday
- Mandatory Workday

November 27th is an Unscheduled Day. It will be utilized as a make-up day if necessary.

Adopted by HACS Board 09/17/2018.

Amended HCS 3/11/2019

Hobgood Charter School

2019-2020 School Calendar Important Dates

August

- *19th – Open House
- *21st – First day of school

September

- *2nd – Labor Day/Holiday
- 11th – Progress Reports
- 13th – Teacher Workday

October

- *3rd – 1st Grading Period Ends
- *7th – Early Release/Report Cards/Parent Conf.
- *24th – Progress Reports
- *25th – Teacher Workday

November

- *11th – Veterans Day/Holiday
- *18th – 2nd Grading Period Ends
- *27th – Unscheduled Day (no school unless used as a make-up day)
- *28th-29th – Thanksgiving Holiday
- *25th – Report Cards

December

- *12th – Progress Reports
- *18th – Early Release Day
- *19th-31st – Winter Break

January

- *1st – New Year's Day/Holiday
- *16th – 3rd Grading Period Ends
- *21st – Teacher Workday/Parent Conferences

February

- *10th – Progress Reports
- *17th – Teacher Workday

March

- *3rd – 4th Grading Period Ends
- *6th – Teacher Workday/Parent Conferences

April

- *10th – Good Friday/Holiday
- *13th-17th – Spring Break
- *23rd – 5th Grading Period Ends
- *27th – Report Cards

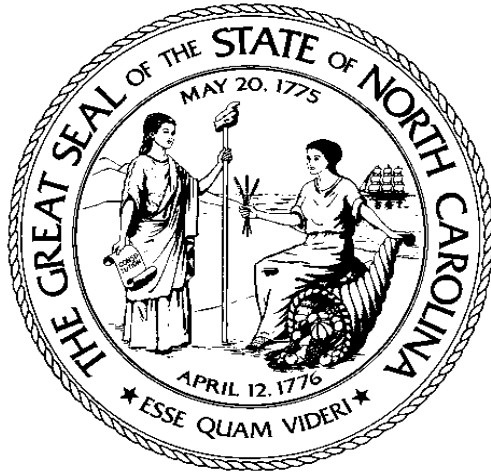
May

- 14th – Progress Reports
- 25th – Memorial Day/Holiday

June

- *5th – Last Day of School/Early Release

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: Hobgood Charter School

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 has provided contact information that is accurate and complete.	

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)	
All assurances are signed 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 describes the projected enrollment for 2020-2025 which represents a 48% increase of economically disadvantaged students to be served. The rationale behind the projected increase is clear when compared to the economically disadvantaged student populations who need support in elementary and middle schools in the LEA. The enrollment projections are ambitious and doable given the impressive strategies including marketing strategies and support structures that will be implemented to help to diversify the schools' student population.			1-2
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
The applicant clearly describes a lottery process that will ensure equal access opportunities for all populations. By ensuring economically disadvantaged (ED) parents are afforded the option to choose the lottery through the application process, the projected percentage of 50% (ED) students will likely be reached. The applicant describes a process that is fair and equitable and will target students who need supportive services which will help to close the academic achievement gap.			2
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

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
A detailed description of the education plan is provided and represents a committed effort to support all populations by eliminating barriers to enrollment as evidenced by the narrative and GEPA. Effective strategies include providing free transportation, fair lottery process and an aggressive enrollment and marketing process to ensure all populations receive fair and ethical consideration. The school also proposes to implement an aggressive professional development plan which will ensure staff are able to provide the supportive services economically disadvantaged student populations need to succeed.			2-3
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 fully identifies goals for the project that are aligned with NC ACCESS Program activities with most meeting the SMART criteria. For example, one goal is that by September 2023, there will be a 10% increase in the number of racially/ethnically diverse families that apply for enrollment as determined by representation in the applicant pool. The baseline currently shows that non-white students represent approximately 25% of the school’s student population, however the most recent Census Bureau information indicates that racial/ethnic minorities make up approximately 60% of the population within the county; thus, the projected increase is achievable.			3-4
Weaknesses/Areas of Concern			Page
The applicant does not provide baseline or projected decrease in the number of in-school, short term suspensions which is one of the project goals presented. Therefore, the goal does not meet the SMART criteria.			3-4

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 clearly describes the school’s academic program which represents a strong commitment to meet the needs of educationally disadvantaged students. The curriculum described is robust with plans to integrate meaningful and applied learning opportunities into its academic programs. The research-based, inquiry-based learning opportunities include project-based learning programs that are designed to improve attendance among economically disadvantaged students. The incorporation of virtual and augmented reality learning opportunities into classroom instruction will further allow opportunities for staff to actively engage students in learning experiences that enhance and broaden their knowledge beyond their community.			4-6
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 contrast with local LEA’s is clearly delineated as programing will specifically focus on programs that are designed to build students ability to solve real-world problems that can ultimately be transferred to improving community and lives of the student. For example, the curricula aligns mathematics with real-world experiences to show math as a practical tool for navigating the world. Staff will be trained to successfully implement the many innovative programs to be provided. Programming will also focus on reducing instances of negative behavior, thereby ensuring students benefit from the curriculum to be provided, and project goals and outcomes are successful as intended.			6-7
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.			
<p>Characteristics of a strong response:</p> <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
<p>A clear and concise description of the school climate is described by the applicant offering insight into the positive and supportive environment the study body experiences. Through the use of the Conscious Discipline framework and providing staff development opportunities, the plan focuses on addressing the academic and behavioral needs of students, faculty and staff to establish a positive school environment that cultivates respectful behavior. The framework helps to teach students how to self-regulate, handle conflict and utilize effective problem solving techniques in social situations, deter negative behavior and decreased discipline referrals.</p>			6-7
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.			
<p>Characteristics of a strong response:</p> <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
<p>Currently, the school calendar is aligned with the county/neighborhood counties, thereby causing no interference with parent/guardian schedules while continuing to provide the academic support disadvantaged students need. Furthermore, by offering summer programming students will continue to learn outside of the traditional school setting and help them to retain what they have learned throughout the school year.</p>			8
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:	1
Strengths			Page
The applicant successfully describes plans to explore potential partnerships including organizations such as the 4-H, Boys and Girls Club of Halifax County, local churches and others in addition to researching other potential partnerships. Other details provided indicate that funds will also support school leaders to participate in the NC Education Policy Fellowship Program (NC EPFP), which is part of the Institute for Educational Leadership and is administered in the state by the NC Public School Forum. This will provide an opportunity for education leaders to network and explore policy related topics.			8-9
Weaknesses/Areas of Concern			Page
The applicant does not describe the budgetary and decision-making autonomy of the board or directors, and no partner agreements are attached.			8-9

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:	1
Strengths			Page
The applicant provides sufficient information indicating that the school employs a full time EC teacher and teacher assistants to provide one-on-one assistance to students. Additionally, there are plans to expand the school’s existing professional development program to include targeted and content-specific professionals to meet the need of students.			9-10
Weaknesses/Areas of Concern			Page
The applicant does not provide an accurate depiction of the current staff currently in place (i.e. teaching positions, diverse makeup etc.) which would help to determine			9-10

the capacity to support specialized students, students with disabilities and English Learner students. No detailed staff recruitment plan is described.	
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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:	Points Earned:
5	5
Strengths	
The applicant presents a logical approach to market/recruit participants for the program to ensure equal access for all. Strategies include implementing a survey process to accurately capture the school’s diversity in terms of educational disadvantages and racial/ethnic diversity. The survey will also be used to determine the demographics for the surrounding areas and neighborhoods, and research potential partnerships. Direct mailings to distribute marketing materials and word-of-mouth recruitment strategies will also be used. The outreach consultant will host meetings with the administrative team and will ordinate and facilitate marketing and outreach events, thereby, ensuring all eligible students will be identified for the project.	10-11
Weaknesses/Areas of Concern	
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:	Points Earned:
5	5
Strengths	
Transportation will readily be available for students via 2 buses currently used, and which stops at several locations to pick children up. Through additional funding, the applicant proposes to purchase an additional 5 buses which will logically accommodate the projected number of students to be enrolled by 2025. These additional buses will allow for more cluster stops and, when possible, home-based stops. Further, the applicant proposes to support car-pooling options for students residing in the rural targeted areas. In the event a family’s transportation needs cannot	11

be met through the carpool or bus options, HCS will work with that family on an individualized basis to develop a solution.	
Weaknesses/Areas of Concern	Page
No weakness noted.	N/A

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:	5
Strengths			Page
The applicant does not participate in the National Food program. However, food is provided by a contracted food service provider which will be used throughout the program.			10-11
Weaknesses/Areas of Concern			Page
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:	5	Points Earned:	5
Strengths			Page
The professional development plan is extensive, detailed and aligned with the overall goal of the program which is to ensure that staff have the resources, insights and networks to meet the needs of all students. The on-going training described includes inquiry-based learning with a focus on project-based learning, cultural competence, guided reading and others subject matters will be provided. Review of the subject matter training clearly supports efforts to ensure mastery of subject matter, understanding student’s learning style, and work habits which provides additional supports to disadvantaged students.			12-13
Weaknesses/Areas of Concern			Page

No weakness noted.	N/A
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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:	Points Earned:
5	5
Strengths	
The applicant describes many opportunities for parental involvement including participating on the advisory council which is already in place. Engagement as an advisory council member provides a wide range of opportunities, including monitoring progress towards the school’s vision, voting role regarding the implementation and modification of school policies, and participation in professional development opportunities.	14
Weaknesses/Areas of Concern	
No weakness noted.	N/A

Application Narrative Total (70 points possible):	66
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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
The applicant provides a detailed student transition plan and the processes described will ensure a smooth transition for all students. The formation of a transition committee consisting of key person’s on the board, parents and community members will ensure successful implementation of the plan. Continuous communication will take place throughout with all staff, parents/students and other stakeholders. Assistance will be provided to families in identifying new schools including outlining school options with available school report cards and student achievement data, available school locations and contact person(s).	14-15
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 provided is inclusive of all funds needed to successfully implement the project services to be provided, thus, making the budget realistic. The line items and cost calculations are presented for salary and fringe to support staff and supplies to support the program.			16-19
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:	10
Strengths			Page
The budget narrative fully describes how costs are calculated and is aligned with the budget presented. The expenditures include unit prices that are reasonable and needed to support the project activities. Because this is an implementation budget, costs will be higher during Year 1. However, the budget will significantly be reduced by Year 3.			20-22
Weaknesses/Areas of Concern			Page
No weakness noted.			N/A

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. The inputs align with the outputs, outcomes and impact. The activities described are in alignment with the goals of the project. For example, by providing transportation to support ED students and families, enrollment will increase at the school with the end result of closing the achievement gap among students	23
Weaknesses/Areas of Concern	Page
No weakness noted.	N/A

Budget, Budget Narrative, and Logic Model Total (30 points possible):	30
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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:	3
Comments (if applicable)			Page
Hobgood Charter School is located in Halifax County, a rural and tier 1 county (<i>County Distress Rankings</i> , NC Department of Commerce). The school is classified as “Rural, Distant” in the state’s Educational Directory and Demographical Information Exchange (EDDIE) system.			24

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	3
Comments (if applicable)			Page
HCS is committed to serving a more diverse and disadvantaged student population. As outlined in <i>goal 1</i> , the school, through the activities outlined in this proposal, plans to closely monitor and increase the racial/ethnic diversity of its student population.			24

The inclusion of high school (9-12) grade levels.			
Points Possible:	3	Points Earned:	0
Comments (if applicable)			Page
The applicant provides a contingent statement below-however no credit is given for the information provided: The school currently doesn’t offer high school grades; however, the school has submitted a formal request to add 9th grade. This request will not be considered until after the NC ACCESS subgrant due date. Therefore, if the request approved, it is possible that HCS will offer 9th grade in the next academic year, in which case the answer will transition from “No”to “Yes.”			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):			6
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Comments (if applicable)	Page
HCS serves a 66.96% economically disadvantaged population (Appendix D-1).	
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
Not applicable.	
As evidence of participation in applicable federal programs, have Title I status.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Comments (if applicable)	Page
The applicant provides documentation to show the school has Title I status (Appendix D-1).	
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
Not applicable.	

Priority Consideration Status Total (4 standards possible):	2
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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 as required.	

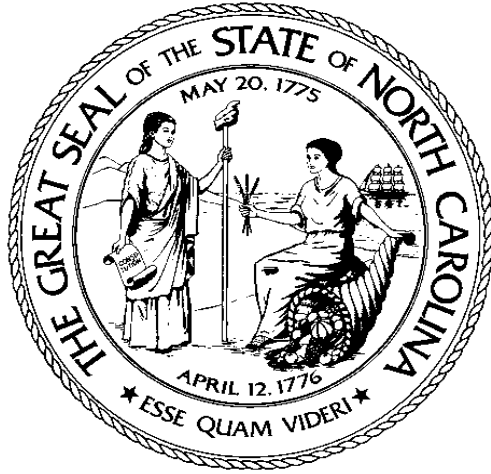
Summary Ratings

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	30
Section V – Competitive Preference Standards	Up to 12	6
Total (must receive at least <i>80 points</i> to pass)	100	102

Priority Standards	Standards Possible	Standards Met
Section VI – Priority Consideration Status	4	2

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 checked="" type="checkbox"/> Pass with Priority
	<input type="checkbox"/> Pass
	<input type="checkbox"/> Fail



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

Applicant: **Hobgood Charter**

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:	5
Strengths	
The school has a history and shows evidence of educating a lot of ED students. The percent of ED students is greater than most in the LEA.	1
Weaknesses/Areas of Concern	
No weaknesses 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:	4
Strengths	
The applicant details a system used to reserve half of all open seats for ED students.	2
Weaknesses/Areas of Concern	
The process of using the lottery for ED and process for non-ED students is not clear.	2

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
Evidence has been presented of successful efforts regarding transportation, EC services and admitting students with physical disabilities.			2-3
Weaknesses/Areas of Concern			Page
No weaknesses 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 goals are measureable, time bound, and seem realistic. The goals align to the NC Access program.			3-4
Weaknesses/Areas of Concern			Page
Professional development offerings are not specific in this section.			3-4

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:	9
Strengths			Page
Strategies are targeted to serve and address the needs of ED students.			4-5
Weaknesses/Areas of Concern			Page

Very little information is shared related to ELA/literacy and mathematics; these are two core subjects in which ED students historically do not perform well in.	4-5
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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	
The applicant clearly articulates math, ELA/literacy, and classroom management/discipline programs. There is a plan for funds on Learning for Living 2 days of pd.	6
Weaknesses/Areas of Concern	
No weaknesses 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:	4
Strengths	
Conscious discipline is well described and well established.	7
Weaknesses/Areas of Concern	
There is no data or statistics about referrals, suspensions, etc.	7

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	
Details have been provided regarding free summer offerings for camps - some well-established, and some new ones being added. There is no real innovation other than summer offerings.	8

Weaknesses/Areas of Concern	Page
Not a weakness but consider more ELA- writing, and creative expression camps in the future.	

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
Plans to partner with the YMCA are in place. There are also plans to extend state-wide- PBL group and Ed Policy fellowship.			9
Weaknesses/Areas of Concern			Page
No specific local partnerships or ideas were proposed. No specific partnerships related to their goals are described.			9

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
Some support staff have been hired; additional plans are in place to hire more.			9
Weaknesses/Areas of Concern			Page
No specific data related to a diverse teaching staff has been described.			

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 applicant details a systematic way of looking at marketing and recruitment. They are also developing additional plans using external feedback, consultants, and internal parent/community advisors.			10-11
Weaknesses/Areas of Concern			Page
The applicant is unsure on LEA's willingness to come tour and give feedback.			

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 budget for more busses, inclusion of cluster stops, and possibly home-based stops if available, increase access much more than cluster stops.			11
Weaknesses/Areas of Concern			Page
No weaknesses noted.			N/A

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:	5
Strengths			Page
Free lunch is available to those who qualify through contracted vendor.			12
Weaknesses/Areas of Concern			Page
No weaknesses 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:	5	Points Earned:	2
Strengths			Page
Variety covers a lot of different areas. Core subjects and learning environments are both addressed.			12-13
Weaknesses/Areas of Concern			Page
There is little about duration, amount of staff, percentage of participants, and follow up or support in PLCs or classrooms after the fact. PD research is pretty clear on the need to be more narrow, focused, and full of follow-up support.			12-13

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:	5
Strengths			Page
School improvement team (SIT) is in place.			14
Weaknesses/Areas of Concern			Page
No weaknesses noted.			N/A

Application Narrative Total (70 points possible):	61
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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
STC has already formed. The applicant provides an example of a Colorado charter school closure.	14
Weaknesses/Areas of Concern	Page
No mention of partners with local LEAs.	

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:	13
Strengths			Page
There is a clear alignment with goals of the grant and goals of the NC Access program. Funds allocated make sense and are spread across a wide variety of efforts.			
Weaknesses/Areas of Concern			Page
There is concern about the lack of capacity building with so much outside contracting and consultant. Who in the school will lead and develop expertise to develop the PD efforts outside of contracted sessions?			

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:	10
Strengths			Page
Everything was clearly explained; things are viable within the grant period.			
Weaknesses/Areas of Concern			Page
No weaknesses noted.			N/A

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 aligns and is clear.			

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

Budget, Budget Narrative, and Logic Model Total (30 points possible):	28
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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:	3
Comments (if applicable)			Page

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	3
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):			6
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input checked="" type="checkbox"/> No <input 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 checked="" type="checkbox"/> No <input 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):	2
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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.	

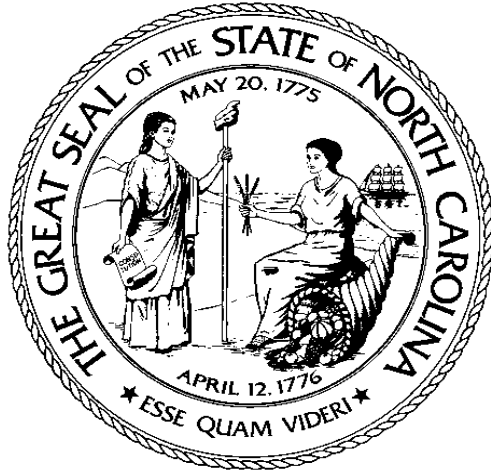
Summary Ratings

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	61
Section III (D) – Student Transition Plan	<input checked="" type="checkbox"/> Complete <input type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	28
Section V – Competitive Preference Standards	Up to 12	6
Total (must receive at least <i>80 points</i> to pass)	100	95

Priority Standards	Standards Possible	Standards Met
Section VI – Priority Consideration Status	4	2

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: **Hobgood Charter Academy**

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
The applicant provides enrollment projections that are complete and realistic.			1
Weaknesses/Areas of Concern			Page
The applicant only proposes a 4% increase (from 69% to 73%) in the population of ED students, which is not significant over the five years of the grant.			1

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 has an approved weighted lottery process outlined in the original charter application. The applicant clearly articulates the enrollment percentage goals and states that 50% of seats will be set aside for ED students. The applicant will guard against discrimination against applicants and will protect student privacy by collecting demographic and income data on a separate sheet from the lottery application.			Appendix, 2
Weaknesses/Areas of Concern			Page
The applicant does not provide a rationale for the 50% threshold or specific details about how the lottery will be carried out.			

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
The applicant has attempted to remove existing barriers by implementing a weighted lottery, offering bus transportation, providing free lunch for qualifying families, employing a fulltime EC specialist, and accommodating students with physical disabilities. The applicant intends to use subgrant funds to expand transportation offerings, build staff capacity to serve more diverse students, and employ a targeted, intensive marketing and recruitment strategy to change the community perception of the school as a private school.			2
Weaknesses/Areas of Concern			Page
No weaknesses 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 proposes a goal to measure the success of the marketing/recruitment strategy of a 10% increase in racially/ethnically diverse families that apply for enrollment, and serving at least 73% ED students by September 2023. Goal is measurable, achievable, and timebound. Applicant proposes a goal to reduce the number of short-term and in-school suspensions. Goal is timebound, achievable, and measurable. Applicant proposes a goal related to parent/staff support and aims for a 5% year over year increase in the percentage of staff who indicate that they have the resources necessary to serve all students, and the percentage of families that feel supported by the school. Goal is specific, measurable, timebound, and ambitious.			3
Weaknesses/Areas of Concern			Page
In first goal, it’s unclear what the benchmark is for the 10% increase in racially/ethnically diverse families entering the lottery. From the prior year? From current data? Goal related to disciplinary action does not specify a certain percentage by which they want to see infractions decrease every year, so it is difficult to ascertain whether or not the goal is rigorous. Goal lacks specificity.			3

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’s education plan includes a focus on physical well-being to combat documented long-term effects of poverty. This focus is directly targeted to the needs of ED students. The applicant also cites information from the National Center for Children in Poverty which states that poverty can contribute to emotional and social difficulties, and has a focus on the use of the Conscious Discipline Framework to help all students, but particularly those who are ED, have a more successful educational experience. Project-based learning is being used because it has been shown to improve the attendance of ED students (based on research cited by the applicant). The applicant proposes to use subgrant funds to augment their focus on global learning with Google Expedition and other collaborative resources, as well as for a partnership with FirstSchool, which will provide additional supports for schools serving ED students. The applicant also proposes to use subgrant funds to expand a focus on entrepreneurship, which they argue is particularly relevant for students living in rural, economically challenged areas. The applicant provides a clear and comprehensive description of each of the strategies that they’re using to serve ED students, as well as research to support their selections.			4
Weaknesses/Areas of Concern			Page
The applicant’s plans for differentiation and various levels of intervention are not discussed in detail.			

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 applicant points to Conscious Discipline Framework, Investigations 3 and Open Up as different from the offerings of the local district. The applicant acknowledges that PBL is not unique to the school, but proposes to expand PBL by supporting staff participation in a PBL fellowship program offered by the NC Museum of Natural Science. Focus on entrepreneurship will be expanded as well.			3-6
Weaknesses/Areas of Concern			Page
No weaknesses 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:	4
Strengths			Page
The applicant provides parent seminars on multiple issues of interest to families, and provides transportation from cluster stops for these seminars. The applicant also describes providing communities the opportunity to host events. The applicant uses the Conscious Discipline framework to provide a positive and supportive learning environment. The school also uses MTSS framework to provide targeted supports for students needing them. The applicant proposes using subgrant funds to augment the school’s focus on interpersonal relationships and to provide targeted staff PD related to strong school culture.			P. 7
Weaknesses/Areas of Concern			Page
The applicant does not explain how the discipline plan considers the rights and needs of students with disabilities.			

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
To combat summer learning loss, the applicant proposes to offer summer enrichment free of charge. The school’s calendar also includes time for PD and staff collaboration. The applicant states that the calendar is not particularly innovative, but they are committed to helping students that need additional supports.			8
Weaknesses/Areas of Concern			Page
No weaknesses 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
The applicant has formally partnered with Harrison YMCA, which supports the afterschool program. Action for Healthy Kids also provides on-site PD and consultation on the school’s health and wellness focus. The applicant proposes partnering with a number of organizations to provide PD for teachers.			9
Weaknesses/Areas of Concern			Page
The applicant provided a letter of support from First School. Additional documentation outlining the nature of the partnership with Harrison YMCA would be helpful in understanding the role/responsibilities of the community organization and that of the applicant.			

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:	1
Strengths			Page
The applicant currently employs a lead EC teacher and teacher assistants.			9
Weaknesses/Areas of Concern			Page
The applicant does not outline staffing levels for each year, nor do they outline their capacity to serve English learners or to support student’s non-academic needs through counselors, behavior specialists, psychologists, etc. The applicant does not speak to the current diversity of its staff or outline a clear plan to recruit, retain, and support a diverse teaching staff.			

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 applicant proposes to implement a process improvement model to expand its marketing/recruitment efforts. The process will involve collecting survey data from the school and surrounding community, leveraging strategies outlined in the Intentionally Diverse Schools toolkit, and evaluating the success of those efforts. The plan includes involvement from various stakeholders, is based on research and best practices, and emphasizes the evaluation of marketing/recruitment efforts.			
Weaknesses/Areas of Concern			Page
No weaknesses 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:	4
Strengths			Page
The applicant currently provides transportation from cluster stops using two buses. The applicant proposes to use subgrant funds to purchase five additional buses to expand their transportation offerings. Additional buses will allow for more cluster stops, and when possible, homebased stops. The applicant states that they are committed to providing transportation assistance to students with IEPs and homeless students.			11
Weaknesses/Areas of Concern			Page
The applicant does not describe in detail what provisions will be made for students who are unable to get to cluster stops.			

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. 			

<ul style="list-style-type: none"> • 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:	3
Strengths			Page
The applicant does not participate in the NSLP. They provide lunch for students who meet the federal guidelines for free lunches through a contracted service.			12
Weaknesses/Areas of Concern			Page
The applicant does not provide any additional details of how the school will offer food service to all students, nor do they outline a plan to collect free and reduced-price lunch information.			12

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:	4
Strengths			Page
The applicant outlined a number of PD opportunities related to PBL, academic content, discipline, and health/wellness. The applicant proposes to use subgrant funds to allow for the school leader to attend the NC Education Policy Fellowship Program and the PBL Fellowship. The applicant proposes to use subgrant funds to sponsor staff members’ K-8 entrepreneurship certification. Subgrant funds will be used to partner with FirstSchool and Learning for Living.			12-13
Weaknesses/Areas of Concern			Page
Citing recent, peer-reviewed research used to select PD offerings would be helpful to determine likelihood of success and to guard against stereotypes (against students in poverty, for example). The applicant does not outline their plan for PD related to English learners.			

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:	3
Strengths			Page
The applicant currently has a School Improvement Team in place to provide ideas and insight for the school. This body will transition into a parent/community advisory council			14

<p>for the subgrant. The responsibilities and limits of the council’s authority are clearly outlined. The council will have walkthroughs to provide recommendations for making the school environment more welcoming and inclusive.</p>	
<p>Weaknesses/Areas of Concern</p>	<p>Page</p>
<p>Recruitment strategies for bringing additional members onto the advisory council are not clearly described. The plan for informing and educating parents on school policies, procedures, and programming is not clearly described.</p>	<p>14</p>
<p>Application Narrative Total (70 points possible):</p>	<p>58</p>

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 type="checkbox"/> Incomplete <input checked="" type="checkbox"/>
Strengths	Page
The applicant will develop a STC in compliance with subgrant requirements, and once established, the committee will develop a STP that reflects best practices. The applicant provides a sample closure framework as an example.	14, appendix
Weaknesses/Areas of Concern	Page
The applicant has not yet developed a clear and specific plan to recruit, develop, and retain the STC. The STP has also not yet been developed.	

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:	14
Strengths			Page
The applicant’s budget includes all operational costs and major expenditures (transportation, PD, classroom furniture, etc.) described in the application. There is clear alignment between the budget, budget, narrative, and application to support ED students. Described costs are complete, realistic and viable.			
Weaknesses/Areas of Concern			Page
The applicant should ensure that all outlined costs are allowable under the grant (i.e., insurance, legal fees, yearly audit, etc.). The applicant’s budget does not include funds for wraparound support services; whole child supports that will be important for meeting the needs of ED students.			

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:	9
Strengths			Page
The applicant includes all partnerships, professional fees, and contracted services outlined in the application in the budget narrative.			20
Weaknesses/Areas of Concern			Page
Additional information on how the applicant plans to sustain EduSnap observations past the grant period and other parts of the proposed program are needed. The applicant proposes to purchase entrepreneurship curriculum and books in each project year – unclear how long these materials will last and how applicant will be able to sustain this aspect of the education plan past the grant period. The applicant proposes to reallocate any unused PD funds to classroom furniture. The applicant does not outline any other possible uses for unused funds that may also support the needs of ED students (i.e., contracted wraparound services).			

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:	4
Strengths	
The logic model clearly articulates how the inputs and expenditures will lead to the expected outcomes.	23
Weaknesses/Areas of Concern	
There is a lack of focus on wraparound services for students and whole child preparedness is concerning.	
Budget, Budget Narrative, and Logic Model Total (30 points possible):	
27	

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:	3
Comments (if applicable)			Page
Applicant is located in a rural and tier 1 county.			24

Increasing the racial and ethnic diversity in their new, expanded, or replicated school.			
Points Possible:	3	Points Earned:	3
Comments (if applicable)			Page
Applicant has a stated goal of increasing racial/ethnic diversity at the school.			24

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):			6
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Section VI – Priority Consideration Status

Currently serve a forty percent (40%) or higher economically disadvantaged population.	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Comments (if applicable)	Page
Applicant currently serves almost 70% ED students.	
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 checked="" type="checkbox"/> No <input type="checkbox"/>
Comments (if applicable)	Page
Applicant provides evidence of title 1 status.	
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):	2
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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	58
Section III (D) – Student Transition Plan	<input type="checkbox"/> Complete <input checked="" type="checkbox"/> Incomplete	
Section IV – Budget, Budget Narrative, and Logic Model	30	27
Section V – Competitive Preference Standards	Up to 12	6
Total (<i>must receive at least 80 points to pass</i>)	100	91

Priority Standards	Standards Possible	Standards Met
Section VI – Priority Consideration Status	4	2

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 checked="" type="checkbox"/> Pass with Priority
	<input type="checkbox"/> Pass
	<input type="checkbox"/> Fail