

**APPLICATION TO BECOME A CHARTER SCHOOL IN NORTH  
CAROLINA  
FOR 1997-98 SCHOOL YEAR  
GS 115C-238.29**

**COVER/TITLE PAGE**

**FORMAL APPLICATION**

**I. BASIC INTRODUCTIONS**

**INTENT:** It is the intent of the party identified below to establish a Charter School pursuant to Chapter 731 House Bill 955 passed June 21, 1996 by the North Carolina General Assembly (GS 115C-238.29).

**REQUEST FOR PRELIMINARY APPROVAL:** This application and supplementary materials, constitute a formal request to the chartering entity listed below to give preliminary approval for the Charter school described herein:

**PRELIMINARY CHARTERING ENTITY:**  
115C-238.29B(c)

**Name of Chartering entity:** Orange County Schools  
200 East King Street  
Hillsborough, NC 27278-2570

**APPLICANT INFORMATION****115C-238.29B(a)**

Name of Charter School: Orange County Charter School  
Corporate name: Financial Reform for Excellence in Education . (FREE)  
Contact person: Roger Gerber  
Corporate mailing address: 200 Stags Trail  
City, State, ZIP: Chapel Hill, NC 27516  
Phone: 919-967-1029  
FAX:  
Email address:

**PROJECTED AGE RANGE OF STUDENTS ATTENDING:**

From age: 5 years to 13 years.

**LOCAL EDUCATION AGENCY LOCATION:****115C-238.29E(a)**

The Charter School herein named is physically located at the following Local Education Agency:  
Orange County Schools, 200 East King Street, Hillsborough County: Orange

**IS IT THE APPLICANT'S INTENTION THAT THIS CHARTER SCHOOL BE SUBJECT TO SOME SUPERVISION AND CONTROL OF ITS ADMINISTRATIVE OPERATIONS BY THE LOCAL BOARD OF EDUCATION?**

**ONLY TO THE MINIMUM EXTENT MANDATED BY HB955.**

**IS THIS A CONVERSION OF AN EXISTING SCHOOL?**

**NO.**

**Are you converting a public school or a private school?**

**NO.**

**The Charter School must have obtained approval as a Private Nonprofit Corporation from the Secretary of State. A copy of the approval must be attached.**

**115C-238.29B(a) and 115C-238.29E(b).**

Before an application for tax exempt status is made, a Federal Tax ID Number must be obtained from the Internal Revenue Service.

Federal Tax ID Number: 56-1992519  
Form SS-4 may be obtained from the IRS office.

The tax-exempt Status must be obtained from the Internal Revenue Service within twenty-four (24) months of the date of the final approval to operate as a Charter School.

**SERVICES:**

Do you plan to obtain services for the day-to-day operations of the Charter School?

YES

Such services from the Local Education Agency or other vendor might include, but are not limited to, such things as transportation, food services, space rental, evaluation, etc.

Please list services and vendors in the appropriate sections of the application.

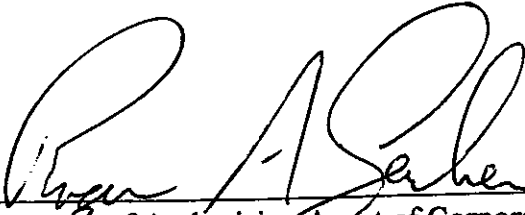
**ACKNOWLEDGMENT**

115C-238.29E(c)

**ACKNOWLEDGMENT:**

The applicant acknowledges that, if successful in gaining final approval as a Charter School by the State Board of Education, the Corporation must enter into a formal contractual agreement with the Local Education Agency or the State Board of Education on behalf of the Local Board of Education.

**TITLE:** Financial Reform for Excellence in Education

  
Signature of Authorizing Agent of Corporation:

Date: OCTOBER 31, 1996

**ROGER GERBER**  
PRINT NAME of Authorizing Agent of Corporation

**EXECUTIVE DIRECTOR**  
Corporate Position

## II. STATEMENT OF IMPACT

By October 31, 1996, a statement of impact must be completed by the LEA. After the applicant completes the application, the applicant must send a complete copy of the application (including the impact form) to the Superintendent of the LEA in which the charter school will be located. The LEA must complete this form and return it to the preliminary chartering entity (if other than the LEA) within fifteen days of receipt so that the chartering entity can use this information in evaluating the application.

**The proposed Charter School is expected to impact on the Local Education Agency in the following manner:**

*(Describe in the space below and attach any supporting documentation)*

Local Education Agency:

Address:

Signature of Superintendent:

Date:

Signature of School Board Chair:

Date:

### III. MISSION AND PURPOSES

#### A. DESCRIBE HOW THE SCHOOL'S PROGRAM IMPLEMENTS ONE OR MORE OF THE PURPOSES OUTLINED IN 115C-238.29A

The school's program will include three main elements:

- A challenging academic curriculum.
- A strong discipline and honor code.
- A parent/guardian, student, teacher, school contract.

In combination, these elements will contribute positively to all six of the purposes listed in GS 115C-238.29A:

1. Student learning will be improved because:
  - No disruptive behavior will be tolerated in the classrooms.
  - The environment will be safe for all students.
  - The environment will be safe for all teachers.
  - Teachers will be empowered and supported.
  - Challenging homework will be given daily.
  - Class sizes will be small, with 16 students or less.
2. The program will help "at risk" students, defined as those that are performing below their potential. This will include academically gifted children who are insufficiently challenged in other public schools:
  - There will be high expectations for all students
  - Students will be pre-tested to ensure that they are working at the appropriate level.
  - From the pre-testing, personal education plans will be provided as needed.
  - Progress will be measured by post-testing, review of portfolios, and other assessments.
  - Special programs may be based on recommendations from UNC system institutions.
3. Innovative teaching methods will be encouraged because:
  - The teachers will have the opportunity to influence the curriculum.
  - The staff will be selected for a shared vision of academic excellence.
  - The main objective will be academic achievement.
  - There will be more nationally normed testing to enable performance to be compared to other schools, nationally, and internationally.
4. The program will provide professional opportunities because:
  - Teachers will be rewarded for results, and merit, rather than time served.
  - Salaries will be competitive with other public schools in the district.
  - Teachers will have responsibility for and control of the educational environment.

- When the program succeeds, teachers will have opportunities to take leading roles in setting up similar programs elsewhere.
  - Motivational training seminars will be provided for professional staff.
5. By definition, charter schools increase the choices available in public education. They can offer more choices if they:
- Remain flexible by using their exemption from most rules applying to other public schools.
  - Establish a level of bureaucracy similar to private schools, which is typically less than that of North Carolina public schools.
  - Allow parents and teachers to influence the curriculum, budgets, and other important issues.
  - Ensure that the school is managed locally. This will create a sense of ownership in the community and a passionate commitment from parents.
6. The school will follow the assessment schedules of the other elementary schools in the district to ensure valid performance comparisons. Additional nationally normed testing will be used to facilitate comparisons with schools in other states. Primary assessments will include at least:
- Academic achievements as measured by test scores.
  - A safe environment as measured by incidents and disciplinary removals.
  - Parental involvement, as measured by volunteer hours per parent or other forms of participation.

#### **B. STATE THE EDUCATIONAL PURPOSE FOR THE CHARTER SCHOOL.**

115C-238.29B(a) (c)

NOTE: This one paragraph summary describes the purposes of the proposed Charter School and may be used for public relations purposes.

The educational focus of the charter school is to set a new standard in North Carolina for K through 8 education, by motivating all students to achieve their full potential. The goal will be to assist parents in their mission to develop exemplary young citizens with superior academic preparation, equipped with analytical thinking skills, a passion for learning and a virtuous character, all built upon a solid foundation of knowledge.

#### **C. FROM YOUR PERSPECTIVE, STATE THE LIKELY IMPACT ON THE COMMUNITY**

1. Chapel Hill-Carrboro City Schools (CHCCS) are experiencing a rapid growth in enrollment. Although two new schools with a total capacity of 1,600 students were opened in August 1996, the Average Daily Membership in September was reported as 8,068 compared to an overall school capacity of 8,461. The surplus capacity of 393 will cover the district's needs for only one more year. The enrollment growth exceeds 300 students per year, owing to a sustained high rate of residential construction in the district. No new schools will come on line until the fall of 1999. In September 1998, enrollment is likely to exceed capacity by 300

to 400. This is an important issue in Chapel Hill as evidenced by the fact that a political action group called "Stop Overcrowding Schools" exists solely to promote the acceleration of school construction.

Over crowding is especially acute in the lower grades. The new McDougle elementary school with a capacity of 600 opened in August 1996. By the tenth day of school, the enrollment was 627. The total capacity of the seven elementary schools is 3,692, compared to an enrollment of 3,775 (83 students in excess of capacity). The elementary schools will be about 250 students over capacity in the fall of 1997, and this figure will rise to 420, a year later. The entire capacity of the next elementary school will be exceeded when it opens in 1999. Given this situation, there can be no realistic expectation that the trailers and temporary classrooms will be eliminated from Ephesus elementary, the most severely crowded school in the district.

The situation can be transformed by the creation of several small charter schools in or around the Chapel Hill. This school will be located in south east Orange County, in order to serve the rapidly growing school age populations in the Hillsborough, Durham, Chapel Hill "triangle". It is the intention of FREE to work with Orange County Schools, Chapel Hill-Carrboro City Schools (LEAs), and Orange County administrators to relieve overcrowding in public schools. Charter schools nation wide have demonstrated that new schools can be established within one year, compared to three to five years for LEA schools.

2. This charter school will unequivocally pursue academic excellence for all children, and thereby challenge the other schools in the district to do even better. While the Orange County LEAs do a good job for most of their students, the county ranks much lower with respect to the performance of its Afro-American students. We believe that this disparity is created in the lower grades. Our studies of the Barclay School, Holt Elementary, and R.N.Harris Elementary have convinced us that a strong, structured curriculum, plus high expectations will improve minority performance. We will not consider our school a success until the academic performance of our Afro-American students ranks among the best in North Carolina.
3. This charter school will be based on the precept that self esteem should be earned, not given. This school will concentrate on students producing high quality work or making outstanding efforts. Students will gain skills and work habits that will benefit them and the communities they live in throughout their lives.
4. We believe that the decentralization of public education will have many benefits. We aim to put the control of our school in the hands of the community, and the families of the children who attend the school.  
"Where the control of education is taken out of the hands of the family and the community, and schooling gets further and further away from the people who have a direct stake in it, the quality suffers. It is that which accounts in the largest part, for the deplorable state of American education today."

*Human Scale*, page 127, by Kilpatrick Sale,

5. We intend to work hard to maximize community involvement in our school. A recent survey of 8th grade education found that public schools have a much lower level of parent volunteers than private schools:

|                 | Parent volunteers |
|-----------------|-------------------|
| Public schools  | 15%               |
| Private schools | 50%               |

A major objective of the Orange County Charter School is to involve at least one parent of all students in school related activities and we will expect a level of involvement greater than the 50% seen in private schools. Just as in private schools, services will be performed by salaried staff only if students or parent volunteers cannot deliver the same service at equal or better quality. Besides the obvious benefits to the school and to the students, we believe that this will have a beneficial effect on the entire community.

6. One result of our determination to reduce overhead expenditures will be a sharp reduction in class size as measured by students per teacher. According to the Public School Forum (Raleigh, NC) the benefits of reduced class size are not dramatic until the class size falls below 15 students per teacher. We will ensure that no class will have more than 16 students/teacher but we are budgeting an average class size of 12. The figures below reflect the declared 1995/6 figures for the school districts, and the 1997/8 budget for the OCCS.

|                              | Students/teacher |
|------------------------------|------------------|
| Orange County Charter School | 12.0             |
| Orange                       | 15.8             |
| Chatham                      | 16.4             |
| Chapel Hill-Carrboro         | 23.1             |



## IV. EDUCATION PLAN

### A. METHODS OF DOCUMENTING STUDENT SUCCESS:

115C-238-29B(b)(2)

Provide a brief description of the method of documenting student success for the school.

We plan to use the ABCs Accountability Model (i.e., state tests). We expect to achieve a substantial year on year improvement in the achievement of basic skills, as envisaged in the "New ABCs of Public Education" (May 1995).

To ensure direct local comparability with OCS and CHCCS. The school will follow a testing schedule similar to nearby public elementary schools and others throughout North Carolina. For example, the CHCCS testing schedule is:

| <b>K through 8 tests</b>                                   | <b>Grades</b> |
|--|---------------|
| Metropolitan 7 Achievement Test. (MAT7), nationally normed | 3,6           |
| End of Grade tests   | 3,4,5,6,7,8   |
| Computer proficiency test                                  | 8             |
| Cognitive Abilities test                                   | 4             |
| NC Writing test  | 4,7           |
| Iowa Basic Skills test                                     | 5,8           |

Every year the school will apply at least one nationally normed tests such as California Achievement Test, Iowa Basic Skills Test or the Metropolitan Achievement Test. This will enable the school to document individual and school wide progress against national averages.

Test results alone are not a sufficient measure of education quality. However, if educators are failing in things that are measurable, it is not reasonable to trust them in things that are not measurable.

The charter school will provide the following information, being part of its obligations under the parent-school contract:

- A written report on each child's progress at the end of each school term.
- Reports on all independent evaluations of the school.
- Tables showing performance on state tests as compared to other local public schools.
- Tables showing expulsions and truancy rates compared to other local public schools.
- Tables showing performance on nationally normed tests.
- An annual report on expenditures and budgets from the school administration.

### B. STUDENT ACHIEVEMENT GOALS:

115C-238-29B(b)(2)

Provide a brief description of the student achievement goals for the school if you are NOT using the ABC Model.

We will use the ABC Model.

**C. ADMISSIONS POLICIES AND PROCEDURES****115C-238-29B(b)(4), 115C-238.29F(g)**

Provide the policies and the procedures for admitting students to the Charter School including the "lottery" option if more students apply than the school can accommodate.

This Charter School will abide by all of the admission requirements as set out in GS#115C-238.29F(g), except that paragraph (3) only applies to public schools that have converted to charter status. Under the terms of paragraph GS#115C-238.29F.(g)(6) a timely application will be defined as one received on or before May 15, 1997. This early date is intended to provide enough time for the school to make offers of employment to public school teachers who must give ninety (90) days notice under the terms of GS#115C-238.29F.(e)(3). As this is a new school, we need to have applications in hand at an early date to enable us to finalize the leasing of a building and to obtain loans to cover start up costs.

The following procedure, for admittance will apply:

- a) Applications will be accepted in three (3) groups. Within each application group there will be further divisions according to school age-grade level.
  - 1) early acceptance - applications received before March 15, 1997
  - 2) regular acceptance - applications received before May 15, 1997
  - 3) late acceptance - applications received before August 15, 1997
- b) If early acceptance applications exceed the school's grade capacity, a lottery will be held as defined in section f) below.
- c) If early acceptance applications and regular acceptance applications exceed the school's grade capacity, a lottery will be held among the regular acceptance applications as defined in section f) below.
- d) If early acceptance applications and regular acceptance applications do not total the maximum particular grade capacity of the school, applications will be held open until August 15, 1997 at which time a lottery will be held for openings as defined in section f) below.
- e) Each year the process will be repeated with the exception that those previously enrolled will have priority to attend the school in subsequent years.
- f) The lottery will be held among all applicants of the grade group. Each applicant will be assigned a number that is written on a 2x3.5 inch card. The cards will be placed in a plastic container, mixed, and then selected at random until school capacity is reached. Once capacity has been reached, the lottery will continue so that a sequentially numbered waiting list can be established. These waiting lists will be used to determine the order for filling potential vacancies at the school.

The school will have one additional admission requirement. Parents will be required to sign a parent-school contract which defines the obligations of both the parents and the school as partners in the education of each child. This contract will include the school obligations to teach and to document the success of each child, as mentioned earlier. It will include the discipline code covered in the next section of this document. It will include a serious commitment by the parents of each child to contribute three (3) volunteer hours each month, to provide a suitable situation and time for the student to do class assignments with reasonable assistance as needed and to work in partnership with the teacher to better ensure the progress of each child.

**D. STUDENT EXPULSION AND EXCLUSION:**

115C-238.29B(b)(11)

115C-238.29F(g)(7)

Provide the procedures and grounds for expelling and excluding students from the Charter School.

There will be a strong discipline code at the school, but there will be no provision for corporal punishment. Good manners, regard for others, care of property, honesty, punctuality and reliability are expected. The main sanctions provided by the punishment system are written assignments, after school detention (for unsatisfactory work), detention (for serious or persistent misdemeanors) and double detention (for more serious offenses). For serious breaches of school discipline, a student may be suspended or his parents may be asked to withdraw him/her from the school. The principal and staff will be expected to use common sense and fairness at all times. Expulsion following a first incident will apply to the following offenses:

- Assault on a staff member or another student.
- The use of weapons to harm another person.
- Possession of drugs or alcohol.
- Verbal abuse of teachers.

All day-to-day management of the school, including discipline, will be in the hands of the principal and the school staff as empowered by the principal. A procedure will be provided to enable expulsion decisions and other serious disciplinary measures to be appealed to the School Governance Committee (SGC). There will be no procedures for referring day-to-day school management decisions to the executive board of the non-profit corporation (FREE). Disruptive behavior will not be tolerated in the classroom. When easily understood rules combined with a demanding curriculum have been introduced into public schools, the result is usually a sharp drop in the rate of disciplinary removals. We expect that expulsions and exclusions in this Charter School will be at a significantly lower level those that seen in other district schools. For example, when the principal of the Barclay School in Baltimore was given the opportunity to implement a challenging and rigorous curriculum, the rate of disciplinary removals dropped from an average of 9 per year to zero.

**E. INSTRUCTIONAL PROGRAM****115C-238.29F(d)(1-5)**

Provide a school calendar for a minimum of 180 instructional days for the 1997-98 school year and the overall instructional program, including models, curriculum, design, methods, etc.

**Tentative school calendar:**

|                            |                                |
|----------------------------|--------------------------------|
| Staff orientation starts   | August 18, 1997                |
| Labor day holiday          | September 1                    |
| School opens               | September 2                    |
| Thanksgiving holiday       | November 27,28                 |
| Christmas break            | December 22 to January 4, 1998 |
| Martin Luther King holiday | January 21                     |
| Good Friday                | March 27                       |
| Spring break               | March 30 to April 3            |
| Last day of school         | June 12                        |

The local school district will open its schools on August 18 and close them in the second week of June. Our teacher year will start on the same day but the students will start two weeks later on September 2. This arrangement allows up to 10 days of staff orientation and training before the students arrive. As this is a new school with new staff, it will also provide opportunities for staff to get to know each other.

The other LEA schools will have 13 teacher workdays/staff development days during the school year. Families with both parents working have difficulties when schools close in mid week. By shifting most of the staff training to the weeks immediately before school opens, the student attendance will be disrupted to a lesser extent.

**Curriculum**

A strong academic curriculum will be a cornerstone of the Orange County Charter School. Our plan includes the idea that the quality of education will improve if parents and teachers are encouraged to influence the curriculum. We therefore wish to leave some flexibility in the curriculum to provide the teaching staff and the pioneer parents with opportunities to be innovative. The curriculum will be as challenging as we can make it, with a traditional basis:

- Core Knowledge Foundation (CKF) curriculum.
- The North Carolina standard course of study.
- Proven courses, such as Saxon math

The staff will be asked to ensure that 5th grade students cover all that is expected of 6th grade students in the other district public schools. In spite of this accelerated curriculum, it is anticipated that at least 20% of the school year will be available for additional curriculum content which the principal, teachers, and parents will define. Challenging home work will be introduced on an increasing scale, grade by grade.

Over the last two years, FREE directors have made many visits to Core Knowledge schools in Durham. We visited Gloria Elmore (Principal), and Elizabeth Shearer (Assistant Principal) at the Holt Elementary School. We also visited Gertrude Williams (Principal), and Sharon Curl (Curriculum Specialist) at the R.N.Harris Elementary School. We have been

impressed by the progress already made by these schools, the enthusiasm of the teaching staff, and the excitement among the students. Gertrude Williams has reviewed this proposal. Elizabeth Shearer is now the principal at the E.K.Powe school.

The founders of FREE believe that sports, athletics and physical education are important factors in K through 12 education. We will encourage the parent volunteer organization to help students participate in existing programs in the area. The LEA elementary schools rely heavily on sports programs which are not school based and the Orange County Charter School would follow the same approach. For example, there is a junior basketball program run by the Carrboro Parks and Recreation Department and Rainbow Soccer.

## V. BUSINESS PLAN

### A. GOVERNANCE STRUCTURE

115C-238.29B(b)(3)

115C-238.29E(d)

The Orange County Charter School (OCCS), Hill, will be controlled by Financial Reform for Excellence in Education. (FREE), a non-profit corporation. The FREE founder members are:

| NAME & ADDRESS  | TITLES                               | PHONE, ETC.  |
|---|--------------------------------------|--|
| Roger Alain Gerber<br>200 Stags Trail<br>Chapel Hill, NC 27516    | Founder member<br>Executive Director | Phone: 919-967-1029<br><br>Email: 73171.2651@compuserve.com              |
| Louise Cole<br>904 Woodbine Drive<br>Chapel Hill, NC 27514        | Founder member<br>Director           | Phone: 919-967-4314  |
| Rebecca Coyne<br>1054 Burning Tree Drive<br>Chapel Hill, NC 27514 | Founder member<br>Director           | Phone: 919-932-7633  |
| Peter Haley Morcombe<br>110 Lisa Drive<br>Carrboro, NC 27510      | Founder member<br>Director           | Phone: 919-942-5461<br>Fax: 919-660-2671<br>Email: peterm@acpub.duke.edu |

#### FREE founder members

The founder members believe that any intervention by board members in day-to-day school operations inevitably undermines the authority of the principal. The school organization structure has therefore been designed to prevent board members from micro-managing the school. To this end, all operational decisions will be made at site level, by the principal or staff members delegated by the principal. The School Governance committee will be responsible for setting school policy, but will not be responsible for day to day operating decisions. Some operating decisions, such as disciplinary removals can be appealed to a School Governance Committee, chaired by the principal, but not to FREE. The duties of the founder members include the appointment of the board of directors.

#### FREE board of directors

Voting will be by means of simple majority. A copy of the bylaws appears in the appendices. The board is responsible for:

- Hiring or termination of all permanent or temporary staff.
- Appointing members of the advisory board.
- All forms of finance, including loans, donations, and grants.
- The provision of buildings, and real estate.
- Approving the school's equipment and operating budgets.

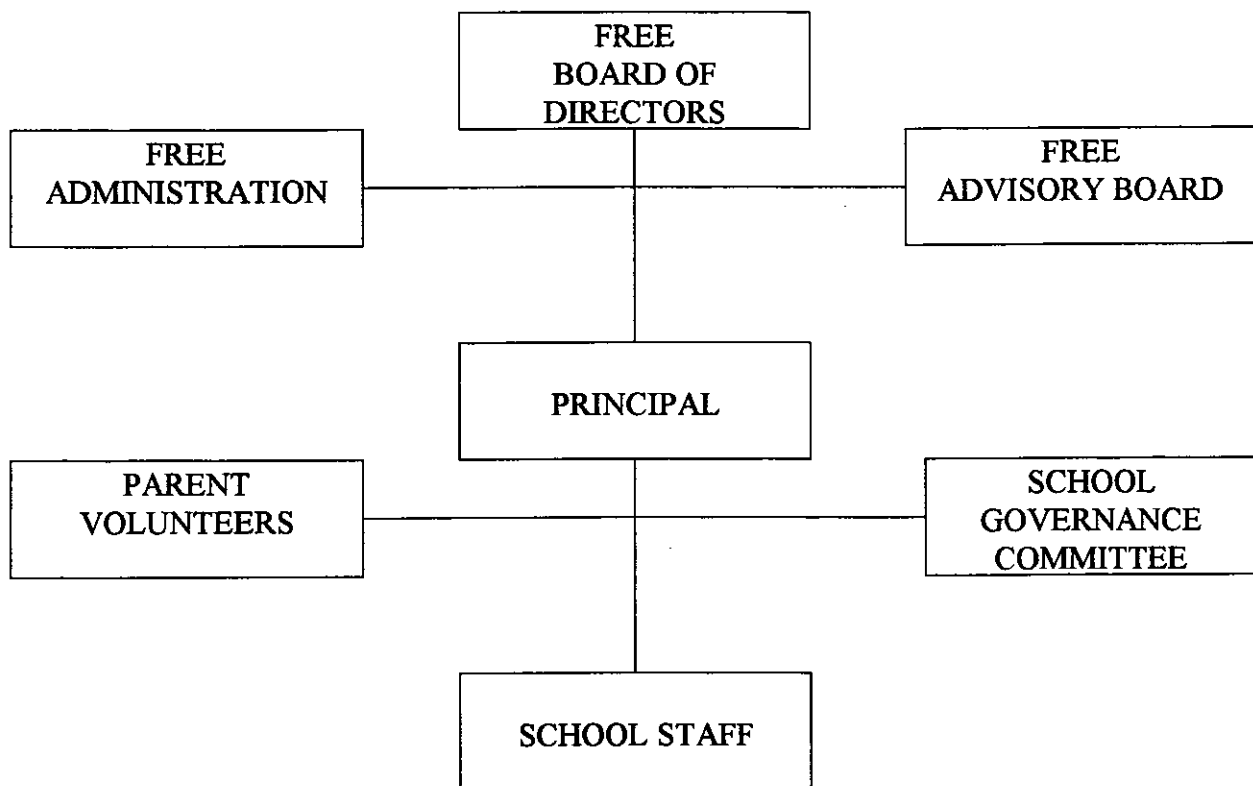
- Matters affecting the school's charter.
- Meeting the legal requirements for an educational facility.
- Maintaining 501 (c)(3) status.

### School management decisions

All day-to-day decisions relating to school operations are the responsibility of the principal or members of the school staff, as the principal may decide. The principal has authority over all day-to-day operating decisions, such as:

- Preparing and recommending expenditure budgets.
- Approving changes to the curriculum.
- Directing all operations including discipline
- Maintaining a safe learning environment.

### Organization chart



### FREE. Administration

Initially, these duties will be undertaken by members of the FREE executive board.

### FREE. Advisory Board

The advisory board primarily consists of people who have contributed to the development of this proposal. In the event that a charter is granted, the board will be expanded to include people who can advise FREE on issues such as fund raising, securing bank loans, facilities planning, marketing, etc.

### OCCS Parent Volunteers

The aim will be to include at least one parent per student in this organization. Approximately 45% of the adult population in the area has a bachelor's degree or higher qualification, so we expect to be able to provide most of the services that are undertaken by salaried professionals in the other district schools. For example, we expect that parents will design, provide and maintain the school's technology, including computers. The volunteers will work to ensure that the teaching staff can maximize the time they spend teaching. The volunteers will provide services at a much lower cost than could be achieved by salaried employees, and will thereby ensure that a very high percentage of the school's income is spent in the classrooms. This will enable the school to achieve a smaller class size than in other district schools, while maintaining teacher salaries at competitive levels.

### School Governance Committee (SGC)

The School Governance Committee will be primarily an elected body with power to oversee all policies of the school, other than those reserved to the executive board of FREE. The SGC will be made up of the principal, one FREE executive board member, plus parents and school full time staff elected by their peers. The principal will be the permanent chairman of this committee. The FREE board member will be the permanent vice-chair.

The SGC structure be similar to that of other public schools in the district. However, the powers of this committee will be greater because there is no district administration or Board of Education involvement in operating policies.



**ROGER ALAIN GERBER**

200 Stags Trail  
Chapel Hill, NC 27516-7310  
919-967-1029

**ACADEMIC BACKGROUND**

FRANKLIN & MARSHALL COLLEGE, Lancaster, PA (1970)  
Bachelor's degree in Government.

**CAREER HISTORY**

D&R HOMESCHOOL, Chatham County, NC (1993-PRESENT)

**Middle school and high school teacher.** Developed an original curriculum for 6th through 9th grade for my two daughters by using a variety of computer programs, books, and workbooks that I found in bookstores, yard sales and catalogues. Worked to balance my students' interests, capabilities and shortcomings in order to create a challenging and stimulating school year. Recognized by Duke's Talent Identification Program (TIP) as a "School of Distinction" in 1996.

CHAPEL HILL HOMESCHOOLERS, (1995-PRESENT)

**Teacher.** Founder of the Tuesday School, an academic program for middle and high homeschoolers.

**Teacher.** Coordinated the Friday School for middle and high homeschoolers.

B.EVERETT JORDAN ELEMENTARY SCHOOL, Alamance County, NC (1989-1994)

**Volunteer.** Donated 10-15 hours per week in all areas of the school, but primarily in the computer lab, as instructor for both teachers and students, and as a hardware specialist. Developed a second grade geography course which I helped to teach for two years and then left behind for the teachers to use. Received the Governor's "Volunteer of the Year" Award for Alamance in 1994.

SELF EMPLOYED, Chatham County, NC (1979-PRESENT)

**House Husband and Child-care Provider.** Managed a household of four and cared for two daughters; initiated "Roger's Summer School" to supplement the academic year while my daughters were in elementary school.

**House Builder.** Designed and built our family home, with my wife's help. The house was built on a pay as you go basis without subcontractors.

PLAYMAKERS REPERTORY COMPANY, Chapel Hill, NC (1978-1980)

**Box Office Manager.** Managed season and individual ticket sales for UNC's repertory theater. Trained and supervised paid and volunteer staff.

RINGLING BROTHERS AND BARNUM & BAILEYS CIRCUS, Washington, DC (1975-1978)

**Box Office Supervisor.** Managed ticket selling operations in five cities per year, traveled and worked with wife. Hired and trained personnel and coordinated ticket sales of up to one million dollars in eight week selling periods.

GLOBAL DOMES INC., Southington, CT (1972-1975)

**President.** Founded and ran a company which manufactured geodesic domes as greenhouses, swimming pool covers, and playground equipment.

**LEISURE**

Co-coached a middle school Odyssey of the Mind team to a third place position in the Eastern Region in 1995-96 (OM is a creative problem solving program for grades K through college).

**LOUISE E. COLE**  
904 Woodbine Drive  
Chapel Hill, NC 27514  
(919)-967-4314

#### **ACADEMIC BACKGROUND**

1967: B.S. BRIGHAM YOUNG UNIVERSITY, PROVO, UTAH 84601

Major: Microbiology Minor: Biochemistry

1970-PRESENT: MISCELLANEOUS COURSES IN:

Personnel Management, Time Management, Behavior in Organizations, Communication/ Human Relations, Technical Writing, Industrial Safety, Advanced Immunology, Narcotics and Dangerous Drugs. Law Enforcement, Computer Technology including specific courses in Microsoft Word, Excel, Access, as well as WordPerfect, Lotus123, Freelance, and Corel Draw. Am Certified in CPR and First Aid.

#### **CAREER HISTORY**

ENVIRONMENTAL PROTECTION AGENCY (1984- 30 September 1996) Retired

Environmental Research: Pulmonary inflammatory response to airborne pollutants.

UNC ELECTRON MICROSCOPY LAB, & INFECTIOUS DISEASES, NCMH Immunopathology Lab, (1983-84)

Research Technician III and Medical Technologist (part-time employment)

VOLUNTARY RESEARCH MICROBIOLOGIST (1979-1981)

Part Time Assistant to Husband in quest for Doctorate in Public Health Microbiology

NC MEMORIAL HOSPITAL (1980)

Clinical Phlebotomist

USACIL EUROPE (1972-1976) US Army Criminal Investigation Laboratory-Europe

Forensic Chemist, and expert witness at military and civilian trials involving drugs.

DESERET TEST CENTER (1967-1972) (Department of Defense)

Research Microbiologist and Chemical Safety Officer

#### **ADMINISTRATIVE AND TEACHING EXPERIENCE (1967-Present)**

Responsible for ordering equipment, replacement parts and materials for research labs.

Teaching at all levels including research techniques, Defensive Driving, Industrial Safety

Seminars, teaching Assistant for several Chemistry Labs, undergraduate.

Appointed Health and Safety Coordinator and Equal Employment Officer for DOD

Wrote government technical reports and sections of manuscripts for publication.

Wrote legal evidence reports for criminal trials

#### **VOLUNTEER WORK**

Sunday School classes

Adult women's classes in sewing etc.

Taught early morning seminary before school (9th -12th grade) for a year and a half.

Have tutored my 15 year old son in math for the last three years. (Brought him from a D to an A in Math)

#### **FAMILY**

Have 6 children ages 15-22 and one is married age 28.

Have helped all of them while they were in school with homework assignments, projects etc.

I am deeply committed to the idea that parents should be more involved in the education of children.

**REBECCA S. COYNE**  
1054 Burning Tree Drive  
Chapel Hill, NC 27514  
(800)-796-3102

### **CAREER OBJECTIVE**

To improve education for all children, but with a special emphasis on increasing the opportunities for handicapped people.

### **ACADEMIC BACKGROUND**

**SAN FRANCISCO STATE UNIVERSITY**, San Francisco, California.

Renewable California Credentials: Multiple Handicap, Severe Handicap.

Lifetime California Credentials: Multiple Subject, Specialist Communication Disorders, Community

College Instructor Specialist.

1978 M.A. Major: Special Education, Communication Disorder.

Minor: Multiple Handicap, Severe Handicap.

1976 B.A. Major: Liberal Studies.

Minor: Teaching English as a foreign language.

### **CAREER HISTORY**

**REBEL . (1995-PRESENT)**

Vice President of an organization devoted to improving K through 12 education.

**PRIVATE TUTOR (1982-1995)**

Teaching remedial skills or enrichment to a variety of students.

**GLENDAL COMMUNITY COLLEGE**, Glendale, CA (1980-1982)

Teaching advanced sign language, with a general overview of education of people with disabilities

**LOS ANGELES UNIFIED SCHOOL DISTRICT (1979-1982)**

Teacher for severely disabled, and violently aggressive secondary students.

**CENTRAL NORTH CAROLINA SCHOOL FOR THE DEAF (1978)**

Teacher for the gifted.

**A.C.R.E.D. REPRESENTATIVE (1974-1978)**

Developing, and implementing Christian Religious Education of the deaf for the Lutheran Church to meet the changes caused by Federal Law 94-112.

**SAN FRANCISCO STATE UNIVERSITY (1973)**

Research Assistant in the Disabled Student Service Center. Research, and compiling a catalogue of assistive devices for the handicapped.

**REGISTERED INTERPRETER FOR THE DEAF**

Facilitated communication for many clients in a variety of settings.

### **VOLUNTEER POSITIONS**

**TRINITY LUTHERAN CHURCH, SAN GABRIEL, CA (1991-1993)**

Sunday School Superintendent.

Teacher for English as a Foreign Language to Taiwanese students.

**MOUNT OLIVE LUTHERAN CHURCH, PASADENA, CA (1982-1985)**

Sunday School Superintendent.

**SHEPHERD OF THE HILLS LUTHERAN CHURCH, SAN FRANCISCO, CA (1973-1977)**

Sunday School Superintendent.

**CALIFORNIA 94-142 TASK FORCE**

Member.

### **PERSONAL**

Trilingual: English, Spanish, and American Sign Language.

**PETER H. MORCOMBE****CAREER SUMMARY**

Over 30 years of high technology manufacturing experience in product design, process development, project implementation and general management. Eleven patents.

**ACCOMPLISHMENTS**

- Set up many factories producing precision optics, computers, telecommunications equipment, and foods.
- General management experience includes businesses producing lasers, streak cameras, optical fiber, optical cables, marine radio systems, fish, and edible proteins.
- Technical management experience includes responsibility for large engineering departments. Products included computers, telephone switching systems, and telephone instruments.
- Project management and consulting experience includes building a particle accelerator, reorganizing factories, relocating factories, and building several manufacturing plants from scratch.

**CAREER HISTORY****DUKE UNIVERSITY (1990 -PRESENT)**

Project planner and facilities manager for the Duke University Free Electron Laser Laboratory.

**FREELANCE CONSULTANT (1987 -1990)**

High technology factory reorganizations and start ups in ten states from Maine to California.

**ITT CORPORATION (1978 - 1987)**

Director of Business Operations, Asia, Pacific, and Latin America. 1982-1987.

General Manager of the Optical Communications Division of STC Ltd. 1978-1982

**SELF EMPLOYED / FREELANCE CONSULTANT (1970 - 1978)**

High technology factory reorganizations, start ups, and product development in the United Kingdom.

**ITT CORPORATION (1966 - 1970)**

Technical Director, STC Telephone Switching Group, London, England. 1969-1970.

Chief Engineer, STC Switching Division, Belfast, Northern Ireland. 1966-1969.

**GEC (TELECOMMS) LTD. (1958 - 1966)**

Chief Engineer, Telephone Division, Newton Aycliffe, England. 1964-1966.

Various Engineering Positions. 1958-1964.

**EDUCATION**

Member of the IEEE & the IEE. Master of Arts degree from Cambridge University, in Electrical Engineering (Honors), and Physics (Class II, Div I). Awarded a major scholarship in Physics by Pembroke College and an industrial scholarship by GEC Ltd. TEMA award 1962. Some French and Spanish.

**K THROUGH 12 SCHOOL EXPERIENCES****I have six children. They have attended several different types of schools in the UK:**

Three children attended Belfast High School Junior, a private school covering K through 8th grade.

Three children attended Skegoneil (Belfast) school, a state school covering K through 8th grade.

One child attended Royal Belfast Academical Institution, an independent state (cf. Charter) high school.

One child attended Seaford College, a private boarding school (9th through 12th grades).

Three children attended Stansted Comprehensive, a state high school.

**And in the United States:**

One child attended the Holland township state school in New Jersey, and later the Lawrenceville School, a private high school.

Two children attended the Delaware Valley High School, a government school in New Jersey, and transferred to Phillipsburg Catholic, a parochial school.

One child has attended Carrboro elementary. He is now a 4th grader at McDougle elementary

One child is in pre-school.

**I have actively advocated the reform of K through 12 public education at federal, state, and local levels.**

Ran for a Chapel Hill-Carrboro City School Board seat in 1995. Lobbied at state level in support of expanding school choices, including the introduction of charter schools.

**B. PROJECTED TYPES OF STAFF OT THE CHARTER SCHOOL**

115C-238.29B(12)(e)--*Comment: This clause could not be found in HB 955.*

Provide a list of all positions anticipated for the Charter School

Permanent salaried positions will include:

- School principal 1
- School secretary 1
- Teachers 14 to 18

Part time volunteer positions

- FREE founder members 4
- FREE board of directors 3 to 7
- FREE advisory board members 5 to 11
- OCCS School Governance Committee 7 to 11
- Parent volunteers 150 to 300

**C. QUALIFICATION REQUIRED FOR INDIVIDUALS EMPLOYED BY THE SCHOOL.**

115C-238.29B(b)(10)

The school will comply with all requirements under GS#115C-238.29F.(e). At least 75% of the teachers will hold current North Carolina teachers certificates. Teaching staff will be expected to have experience teaching children at the appropriate grade level and to have qualifications in the subject being taught. The principal will have five years or more of teaching experience, plus a successful record in a leadership role such as principal or assistant principal.

The FREE board of directors believe that the selection of teaching staff is the most important single factor in achieving excellence and that is why their approval will be required for all hirings. The FREE board members will expect prospective staff members to have a sincere and enthusiastic support for the principles laid down in the school charter.

One advantage of using the Core Knowledge Foundation curriculum is that teachers can be recruited who have already worked in similar schools elsewhere. Around the nation there are hundreds of CKF schools, including 45 in Maryland, 14 in Mississippi, and 2 in nearby Durham. Even so, many teachers recruited will not have this experience, so staff development funds averaging \$1,500 /teacher have been included in the first year budget, and \$900 /teacher in the second year.

**D. COMMITMENTS OF STAFF TO DATE.**

As of the date of this application, state the number of individuals who have made commitments to work in the Charter School.

At present, one qualified candidate has applied for the position of principal, and there are eight teachers have asked to be considered for teaching positions. We are confident that letters of offer can be made to all teaching staff before the end of April 1997. None of these contacts amount to firm commitments. FREE will not be able to make formal offers to prospective staff members until a charter has been granted.

This document is the work of:

One homeschooler  
Two public school teachers  
One advocate of education reform

Roger Gerber  
Rebecca Coyne & another teacher who is  
currently employed by the CHCCS  
Peter Morcombe

The proposal has been subjected to two rounds of review by 40 people. Public meetings were held on September 12 and October 10 with the aim of informing members of the local community as the proposals were developed and soliciting comments. Most of the reviewers wish to remain anonymous, and the others are listed below:

William Beckman Jr., adjunct assistant professor of education, UNC Wilmington  
William Burke, dean of the Department of Education, UNC, Chapel Hill  
James Colovito, principal of the Duke School for Children, Erwin Road, Durham  
William Elstran, educational consultant, Chapel Hill  
Kitty Felten, Spanish teacher, Alamance County Schools  
Dianne Ford, Homeschooler, Graham  
Stephanie Freeman, English professor, NCCU, Durham  
James Gallagher, Kenan professor, UNC, Chapel Hill  
David Kolbinsky, member of the Orange County Schools Board of Education  
Robert Mays, director of the Emerson-Waldorf School, Chapel Hill  
Ronald Pannesi, associate professor, Kenan-Flagler Business School, UNC, Chapel Hill  
Neil Pedersen, superintendent, Chapel Hill-Carrboro City Schools  
Richard Rust, professor of English, UNC, Chapel Hill  
John Staddon, James B. Duke professor, Duke University, Durham  
Pamela Teshima, Homeschooler, Chapel Hill  
→ Gertrude Williams, principal of the R.N.Harris School, Durham

FREE has an extensive network of local residents who have undertaken assignments in support of the proposal writing group. All efforts are provided on a volunteer basis.

**E. REQUEST TO HAVE FEWER THAN THREE TEACHERS:**  
**115C-238.29B(b)(12)**

This Charter School will not request an exemption to employ less than three teachers.

**F. PROJECTED STUDENT ENROLLMENT:**  
**115C-238.29B(b)(12)**

**Two year enrollment projections By Grade, By Local Education Agency**

Identify each Local Education Agency from where the students may come

From: LEA 1 Orange County Schools (OCS)  
 LEA 2 Chapel Hill-Carrboro City Schools (CHCCS)  
 LEA 3 Durham County Schools (DCS)

| Grade for     | 1997-98     |             |             | 1998-99     |             |             |
|---------------|-------------|-------------|-------------|-------------|-------------|-------------|
|               | LEA 1       | LEA 2       | LEA 3       | LEA 1       | LEA 2       | LEA 3       |
| Kindergarten  | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 1             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 2             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 3             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 4             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 5             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 6             | 9.6         | 9.6         | 4.8         | 9.6         | 9.6         | 4.8         |
| 7             |             |             |             | 9.6         | 9.6         | 4.8         |
| 8             |             |             |             | 9.6         | 9.6         | 4.8         |
| 9             |             |             |             |             |             |             |
| 10            |             |             |             |             |             |             |
| 11            |             |             |             |             |             |             |
| 12            |             |             |             |             |             |             |
| <b>TOTALS</b> | <b>67.2</b> | <b>67.2</b> | <b>33.6</b> | <b>86.4</b> | <b>86.4</b> | <b>43.2</b> |
| <b>GRAND</b>  | <b>168</b>  |             |             | <b>216</b>  |             |             |
| <b>TOTAL</b>  |             |             |             |             |             |             |

There will be at least one qualified teacher for every 16 students. The target is 12 students per teacher. The budgets have been based on 24 students per grade and two teachers per grade.

Out of the enrollment on the previous page, how many are projected to be "exceptional" children (or children with special needs)?

**Exceptional Children  
Count for**

|                            | <u>1997-98</u> |              |             | <u>1998-99</u> |              |             |
|----------------------------|----------------|--------------|-------------|----------------|--------------|-------------|
|                            | LEA 1          | LEA 2        | LEA 3       | LEA 1          | LEA 2        | LEA 3       |
| Autistic                   | 0.03           | 0.35         | 0.06        | 0.04           | 0.45         | 0.08        |
| Academically Gifted        | 4.47           | 5.00         | 3.05        | 5.75           | 6.43         | 3.93        |
| Deaf-Blind                 | 0.00           | 0.00         | 0.00        | 0.00           | 0.00         | 0.00        |
| Hearing impaired           | 0.11           | 0.05         | 0.06        | 0.14           | 0.07         | 0.07        |
| Mentally handicapped       | 0.95           | 0.86         | 0.93        | 1.22           | 1.11         | 1.19        |
| Multihandicapped           | 0.13           | 0.09         | 0.02        | 0.17           | 0.12         | 0.03        |
| Orthopedically handicapped | 0.07           | 0.07         | 0.01        | 0.10           | 0.09         | 0.02        |
| Other health impaired      | 0.38           | 0.46         | 0.09        | 0.49           | 0.59         | 0.11        |
| Pregnant                   | 0.00           | 0.00         | 0.00        | 0.00           | 0.00         | 0.00        |
| Behaviorally-Emotionally   | 0.81           | 0.85         | 0.36        | 1.04           | 1.10         | 0.46        |
| Specific learning disabled | 3.47           | 4.45         | 1.48        | 4.46           | 5.72         | 1.90        |
| Speech -language impaired  | 2.80           | 1.26         | 0.91        | 3.59           | 1.62         | 1.17        |
| Traumatic brain injury     | 0.02           | 0.01         | 0.00        | 0.03           | 0.01         | 0.00        |
| Visually impaired          | 0.05           | 0.05         | 0.01        | 0.06           | 0.07         | 0.01        |
| <b>TOTALS</b>              | <b>13.24</b>   | <b>13.45</b> | <b>6.97</b> | <b>17.02</b>   | <b>17.29</b> | <b>8.96</b> |
| <b>GRAND TOTAL</b>         | <b>33.66</b>   |              |             | <b>43.27</b>   |              |             |

The above information is based on 1994/95 statistics showing the individual school district populations of exceptional children compiled by the Department of Public Instruction, Raleigh, North Carolina.

**G. REQUEST TO HAVE FEWER THAN 65 STUDENTS:  
115C-238.29B(b)(12)**

Our Charter School will not request an exemption to have fewer than sixty-five students enrolled during the year.



## H. TWO YEAR BUDGET

### 115C-238.29B(b)(5)

#### (1) Revenue projections

| <b>SOURCE</b>     | <b><u>1997-98</u></b> | <b><u>1998-99</u></b> |
|-------------------|-----------------------|-----------------------|
|                   | <b>\$</b>             | <b>\$</b>             |
| State ADM funds   | 549,235               | 753,843               |
| Local ADM funds   | 384,666               | 514,353               |
| Federal funds     | 20,328                | 21,141                |
| Grants            | 50,000                | 20,000                |
| Foundations       |                       |                       |
| Private funds     | 15,000                | 25,000                |
| Student fees      |                       |                       |
| <b>TOTALS</b>     | <b>1,019,229</b>      | <b>1,334,337</b>      |
| <b>\$/student</b> | <b>6,067</b>          | <b>6,177</b>          |

The expenditure figures that follow are based on the staffing patterns of two local private elementary to middle schools with enrollments similar to the Orange County Charter School. These schools have very few non-teaching staff members, owing to the fact that parents and students carry out many tasks that are normally undertaken by paid professionals in government schools. The Orange County Charter School will aim to achieve even higher levels of volunteerism than the private schools do, and thereby ensure that as many dollars as possible are spent in the classrooms.

Staff salaries have been set at levels comparable to the salaries in the district public schools. Benefits costs have been budgeted at 25% of salaries, significantly higher than in local public schools. This is necessary to ensure that our small independent pension scheme can have benefits comparable with the larger schemes enjoyed by LEA teachers.

Other expenses have been budgeted at levels comparable with private schools. This is a conservative assumption because the Orange County Charter School is a public school, and some costs should be inherently lower than for private schools. For example, insurance costs. Another example is the provision of buildings. The Orange County Charter School budget for the first two years provides \$260,000 in rent, \$76,000 in interest payments, and \$169,000 in capitalized facilities improvements. In the LEA public schools, school construction is funded by the Orange County Commissioners, so none of these items appears in school budgets. It is anticipated that some of these costs will be picked up by county, state, or federal government bodies. However, the only item of this kind that has been included in the revenue projections is a grant due in May 1997, as the anticipated share of a recently announced \$1,000,000 federal fund to aid charter schools in North Carolina.

The Orange County Charter School budget includes a line for the telephone costs, but nothing for food or catering. Office equipment and instructional equipment are treated as capitalized expenditures.

## 2) Expenditure projections

| SOURCE                     | 1997-98<br>Personnel | 1998-99<br>Personnel | 1997-98<br>\$  | 1998-99<br>\$    |
|----------------------------|----------------------|----------------------|----------------|------------------|
| Administrator              | 1                    | 1                    | 47,000         | 48,880           |
| Clerical                   | 1                    | 1                    | 23,000         | 23,920           |
| Teachers                   | 14                   | 18                   | 378,000        | 505,440          |
| Librarian                  | 0                    | 0                    |                |                  |
| Guidance                   | 0                    | 0                    |                |                  |
| Teacher Assistant          | 0                    | 0                    |                |                  |
| Custodian                  | 0                    | 0                    |                |                  |
| Maintenance                | 0                    | 0                    |                |                  |
| Food service               | 0                    | 0                    |                |                  |
| Bus driver                 | 0                    | 0                    |                |                  |
| Other                      | 0                    | 0                    |                |                  |
| <b>Salaries</b>            |                      |                      |                |                  |
| <b>Employee benefits</b>   |                      |                      |                |                  |
| <b>Staff developmement</b> |                      |                      | 21,000         | 16,200           |
| Materials and supplies     |                      |                      | 31,920         | 43,092           |
| Office supplies            |                      |                      | 8,400          | 11,340           |
| Telephone                  |                      |                      | 9,408          | 12,580           |
| Instructional equipment    |                      |                      |                |                  |
| Office equipment           |                      |                      | 15,120         | 20,412           |
| Testing materials          |                      |                      | 46,200         | 62,370           |
| Insurance                  |                      |                      | 8,400          | 11,340           |
| Telephone                  |                      |                      | 17,640         | 23,814           |
| Utilities                  |                      |                      | 104,160        | 140,616          |
| Rent                       |                      |                      | 37,280         | 48,016           |
| Maintenance & repair       |                      |                      | 40,320         | 54,432           |
| Transportation             |                      |                      | 13,440         | 18,144           |
| Marketing                  |                      |                      |                |                  |
| Food/Cafeteria             |                      |                      | -              | -                |
| Interest on loans @ 9%     |                      |                      | 16,200         | 16,200           |
| <b>EXPENSE</b>             |                      |                      | <b>929,488</b> | <b>1,201,356</b> |
|                            |                      |                      |                |                  |
| Start up expenditures      |                      |                      | 85,000         | 55,000           |
| Instructional equipment    |                      |                      | 14,520         | 7,580            |
| Office equipment           |                      |                      | 125,000        | 44,320           |
| Building upgrades          |                      |                      |                |                  |

**(3) Working Capital /Assets**

Financial Reform for Excellence in Education . (FREE) is a non-profit organization which is being set up for the purpose of establishing Charter Schools. At this time, it has no working capital or physical assets. In the event that a charter is granted, FREE will undertake to obtain loans for start up costs, and will lease a suitable building.

**(4) Program Audits**

Describe the procedure and method for auditing the Charter School's Programs:

No plan has been made.

**(5) Financial Audits:**

The three accounting companies listed below have stated that they can provide auditing services for non-profit corporations. We expect to be able to appoint one of them to carry out financial audits:

Carver & Bunch, 890 Airport Road, Chapel Hill. 919-929-2149

Garrett Dodd & Associates, 3200 Croasdaile Drive, Durham. 919-383-7026

Neal Bradsher & Taylor, Westgate Plaza, 3622 University Drive, Durham. 919-489-3369

**I. HEALTH AND SAFETY REQUIREMENTS****115C-238.29F(a)**

Address how the Charter School will meet the requirements for:

**(a) Immunization of Students**

The school will follow local and state health codes. Where necessary we will help parents arrange immunizations with local health practitioners, or the Public Health Department, as appropriate.

**(b) Fire and Safety Regulations**

The school will follow local codes for fire and other safety regulations.

**(c) Food Inspections**

The school has no immediate plans to provide food services. In the event the SGC decides that this service should be provided, they will be responsible for making all arrangements required by law and common sense.

**(d) Hazardous chemicals**

The school will follow local and state codes for fire and other safety regulations.

**(e) Bloodborne Pathogens**

The school will follow local and county public health codes. Services as needed will be contracted to the LEA or to private health professionals.

**J. CIVIL LIABILITY AND INSURANCE**

115C-238.29F(c)

State the coverages for:

For the purposes of the budget, insurance costs have been set at the level seen in two nearby private schools, which are similar to the proposed OCCS. However, we believe that public schools have inherently lower insurance liabilities than private schools owing to laws that exempt public school administrations from most civil penalties.

**a) Comprehensive General Liability**

We believe that public school exemptions should apply to this Charter School. However, legal advice is required on this question.

**(b) Officers and Directors/Errors and Omissions**

It seems logical that the same exemptions should apply to the managers of Charter Schools. However, legal advice is required on this question.

**(c) Property Insurance**

This has been budgeted at the same level as nearby private schools. Decisions on property issues will be the responsibility of FREE rather than the school management.

**(d) Motor Vehicle Liability**

Provisions for motor vehicle liability will be for the school management to decide.

**(e) Bonding**

No policy has been determined.

**(f) Other**

There are many actions which have to be completed in a very short time in order to open a new school in the fall of 1997. For example:

Recruitment of principal

Recruitment of teachers

Other staff recruitment

Staff training

Preparation of detailed curriculum plans

Procurement of course materials

Solicit student applications

Solicit support locally and at state level

Find and lease a building prior to July 1, 1997

Arrange facilities adaptation, furniture, equipment etc.

Organize transportation to and from the school

Organize formal book keeping and records

Provide an employee benefit package

Refine the budgets

Refine the organization of FREE, SGC and parent volunteers

While the members of FREE, its advisory board and parent volunteers will be able to handle some of the above tasks, assistance will be required from organizations with relevant experience and contacts. With this in mind, we have approached Dr. Neil Pedersen, the superintendent of the Chapel Hill-Carrboro City Schools and he has indicated a willingness to discuss the provision of services under mutually beneficial arrangements. We have also contacted private sector organizations with relevant experience. For example, Alternative Public Schools LLC, Nashville, Tennessee has offered a particularly wide range of services.

#### K. TRANSPORTATION

115C-238.29F(h)

Describe how transportation program/system for students attending the Charter School.

Transportation will be provided as required by law. The LEA will be asked to provide this service, but experience from charter schools in other states indicates that transportation organized by parent volunteers is likely to be a more satisfactory solution. This is an issue for the SGC and the parent volunteers.

#### L. FACILITY

115C-238.29(c)

Ideally every school should have well designed buildings. This is an important long term goal for the Village Charter School. At present, county governments are responsible for building LEA public schools. However, HB 955 does not place any obligation on county governments to provide buildings for charter schools. Our business plan therefore assumes that Orange County will not provide our buildings. State and county ADM funds must not be used for the purchases of land or buildings. These funds must be used for operating costs and we believe that they the rental of facilities is a permissible use for these funds.

School construction will be funded by a combination of loans and donations. A school with 216 students requires about 12,000 square feet of space. Building costs will range from \$50 per square foot to \$120 per square foot, for a total building cost in the range of \$600,000 to \$1,440,000. It will take four to five years to complete the necessary construction and until then the school will operate in rented premises.

In 1997, space requirements will range from 8,000 to 10,000 square feet. Rental costs are typically \$4/square foot/year for low grade warehouse space, \$12/square foot/year for retail space and \$20/square foot/year for office buildings. At present one suitable vacant retail space has been found but we expect to find two or three others before March 15. Adaptation costs will be much higher for warehouse space than for retail or office space. Our budget has been based on leasing retail space, with a substantial adaptation cost.

## M. MARKETING

Describe the marketing plan for the proposed Charter School, including any long-range plans for recruiting students, expanding facilities and attracting certified and other teachers to the school.

Members of the FREE executive board have been actively involved in K through 12 education reform for several years, and have developed contacts with the media which will help us to publicize charter school issues in general, and the Orange County Charter School in particular. The first phase of our marketing plan is simply a continuation of what we have been doing for the last three months. We have been using a variety of low cost communications to increase public awareness of charter schools and to build up a network of supporters. The techniques being used are listed below:

### Public service announcements

Local radio (WCHL), cable TV and newspapers provide free PSAs. We have used these outlets on several occasions to promote public awareness of the Orange County Charter School, and we will continue to do so. In most cases the PSAs will relate to public meetings or fund raising events.

### Radio commentaries

Two ninety-second commentaries on charter schools have already been aired via WCHL. We expect to have further opportunities as the OCCS project moves forward.

### News coverage

We have contributed to news items on WCHL radio and in the Chapel Hill Herald. We are contributing to a planned TV feature on charter schools (WRAL5) but this will probably not be aired until after the November 5 election. Public interest in charter schools is increasing, so these opportunities should continue for some time.

The Chapel Hill News can be counted on to oppose any attempt to reform education. Predictably, they have covered charter schools in a negative way and on October 16 a lengthy editorial warned against "...taxpayer-funded tinkering with children." The Core Knowledge Foundation curriculum was derided as "rote learning". The coverage has been so biased that it has had the unintended consequence of stimulating local residents to write a string of "letters to the editor" in favor of charter schools. This form of public debate on charter schools will help to make the general public more aware of the issues.

### Guest columns and "letters to the editor"

Our directors have been featured in the Chapel Hill Herald, the Chapel Hill News, the Herald-Sun, and the News & Observer on dozens of occasions. Recently, we have concentrated on charter school issues, as illustrated by the N&O "Point of View" in the appendices.

### Public meetings

Our first public meeting was held on September 12 in the Carrboro town hall and the second on October 10. More public meetings will be held if a charter is granted.

**Word of mouth, and direct mail**

We already have a local listing of over 200 people who have shown an active interest in education reform. We will contact these people by phone or through mailings whenever appropriate. We expect this listing to grow significantly as the public becomes more aware of the charter school movement.

**Internet**

We plan to set up a web site for the Orange County Charter School. We will also use the Internet to communicate with other charter schools and with CKF schools.

Over the next four to five months we will raise funds to support the second, and more intense, phase of the publicity campaign that will be needed after March 15, 1997 assuming that a charter is granted. The granting of charters will be a sufficiently newsworthy event to ensure more free coverage, but we will back this up with paid advertising and direct mailings. At present, we have about \$600 of the \$1,800 needed to implement the second phase of our campaign:

**Staff recruitment**

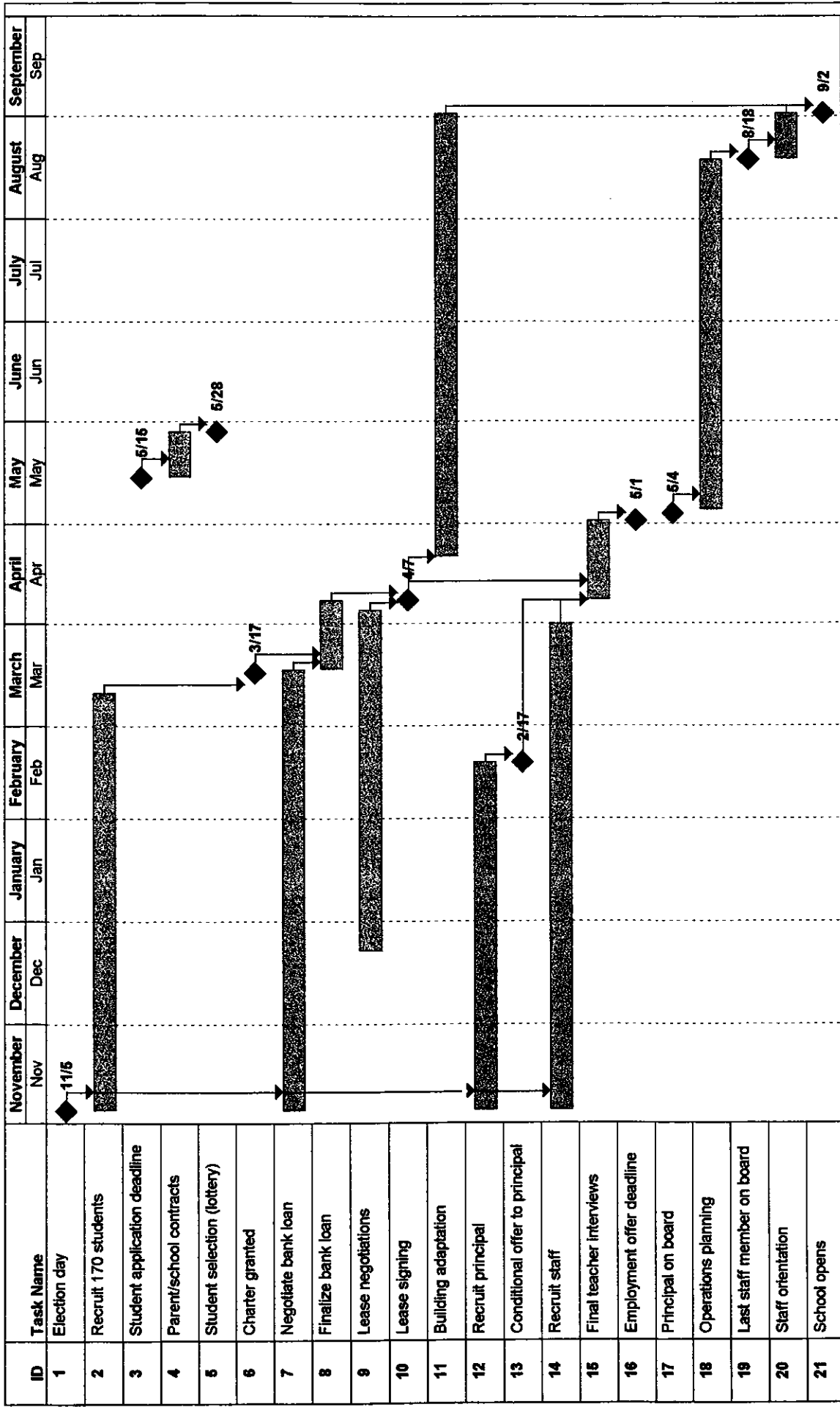
We will use paid advertisements in local newspapers and in professional publications to attract teachers. We will also use local school publications wherever possible. We will make a direct mailing to all of the 100 CKF schools on the eastern coast of the United States. This publicity campaign will be timed to support a May 1, 1997 target date for job offers to prospective teachers.

**Parent/student recruitment**

In addition to continuing all of the communications used in phase 1, we will use paid advertisements, primarily in the Herald-Sun. We will also make a direct mailing to the 2,000 district households with school children in the appropriate age range. This publicity campaign will be timed to support the May 15, 1997 deadline for student applications.

**Fund raising**

Once the Orange County Charter School is operating, we expect to be able to raise about \$25,000 per year from donations. These funds will be used to support long term facilities development. Our supporters include people who raise development funds for UNC institutions.



Task

Progress

Milestone

Summary

Rolled Up Task

Rolled Up Milestone

Rolled Up Progress

ORANGE COUNTY  
CHARTER  
SCHOOL





# Core Knowledge

## The Common Ground for Uncommon Success

"Core Knowledge has made a major difference to my students and myself. The content is thrilling and fascinating. My interest and energy rub off on my students. In addition, I have developed a close working relationship with other teachers. There is unity among us. My students are learning high level concepts. They are being challenged and they love it!"

—Margarita Johanet,  
Teacher, Mohegan School  
(PS 67), Bronx, NY



"Core Knowledge is the program that I have been searching for for more than twenty years. Please know that your efforts have changed the lives of our students and the professional outlook of our teachers."

—Jeff Litt, Principal, Mohegan  
School (PS 67), Bronx, NY

"The Core Knowledge curriculum is providing all our students with the opportunity to experience success. It is instilling in them a love of learning and a strong desire to learn even more."

—Connie Jones, Principal, Three  
Oaks Elementary, Ft. Myers, FL

**"I HAVE FINALLY FOUND SOMETHING THAT  
CAN HELP ME HELP MY CHILDREN."**

—Marissa Ganey, Parent, Illinois

**T**HE CORE KNOWLEDGE FOUNDATION, a non-profit organization founded in 1986, is dedicated to excellence and fairness in early education.

At the Core Knowledge Foundation, we believe that all children can learn. They are eager to learn about the world around them, about facts and legends, far-off people and places, songs and works of art, and much more.

Learning takes place gradually. As children grow, they learn by building on what they already know. That's why it's important to begin building foundations of knowledge in the early years of schooling, to establish a secure basis for later success in school and in life.

Our hope at the Core Knowledge Foundation is that all children in American schools will have abundant opportunities to build strong, early foundations of knowledge.

This can happen—as it is happening in the most effective and fair school systems in the world—if children learn a core of shared knowledge, defined in terms of specific content that builds grade by grade.

We invite you to learn more about the model curriculum guidelines developed by the Core Knowledge Foundation, and to discover why, as more schools "share the knowledge," they are discovering that *Core Knowledge is the common ground for uncommon success.*

Have you examined your school's curriculum?  
Does it state **specific content goals**?

## What does it take for a school to be successful?

It takes a common vision and shared effort to make that vision a reality.

In elementary schools, teachers need to have a common vision of what they want their students to know and be able to do. They need to reach *clear, specific agreements* about how their children should develop socially and emotionally, and how they should progress academically.

In many good schools, teachers already share some common ground on the social and emotional outcomes they expect of students. In Core Knowledge schools, teachers also share a common vision for academic success.

Core Knowledge schools are successful schools because the Core Knowledge curriculum

- offers a clearly marked path for consistent student progress, year by year
- promotes professional cooperation by providing a basis for specific agreements about what to teach
- provides the foundations of adult literacy by introducing children to the shared knowledge long taken for granted by writers and speakers in the United States
- encourages success in school and later life by giving children the most important foundation to be flexible, productive lifelong learners: a broad range of important knowledge.

# THE CORE KNOWLEDGE SEQUENCE

To help elementary schools achieve a common vision for academic success, the Core Knowledge Foundation developed the *Core Knowledge Sequence for Grades K-6*. The *Core Knowledge Sequence* offers detailed, explicit, year-by-year recommendations for specific content in history, geography, mathematics, science, language arts, and fine arts. The specific content in the *Sequence* is meant to comprise about 50% of a school's curriculum, and complements the general skills and outcomes in many state or district curricular guidelines. For example:

### TYPICAL DISTRICT CURRICULUM

#### Geography, grade 1:

- Know geography of the school campus.
- Identify the globe as a model of the earth.
- Use a map or globe to become aware of the location of places linked to units of study.
- Distinguish between land and water on maps and globes.

#### Language Arts, grade 2:

- Use word attack skills to decode written language.
- Read books for a sustained period daily.
- Relate reading to own experiences.
- Monitor own reading as part of the comprehension process.
- Identify cause and effect relations in a selection.
- Gain an understanding of self and others through a variety of multicultural materials.
- Locate details that recall who, what, where, when, and why.
- Use correct forms of common irregular verbs and the verb "to be."

### CORE KNOWLEDGE SEQUENCE

#### Geography, grade 1:

- Finding directions: east, west, north, south.
- The continents: Asia, Europe, Africa, North America, South America, Antarctica, Australia.
- Locate U. S., Canada, Mexico.
- Identify major oceans: Pacific, Atlantic, Indian.
- Locate the equator.

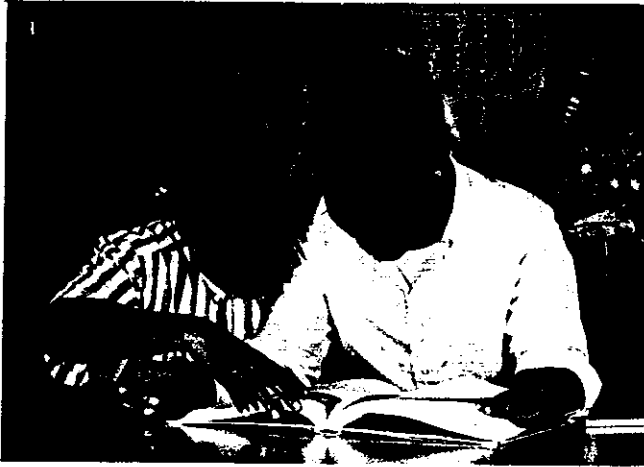
#### Language Arts, grade 2:

- *Stories*
- Anansi stories
- The Blind Men and the Elephant
- A Christmas Carol
- The Emperor's New Clothes
- Peter Pan
- Iktomi stories
- How the Camel Got His Hump
- Charlotte's Web
- The Tongue-Cut Sparrow
- *American myths and tall tales:*
- Paul Bunyan, Johnny Appleseed, John Henry, Pecos Bill
- *Greek myths:*
- Demeter and Persephone;
- Prometheus; Atalanta; Arachne;
- Jason and the Golden Fleece;
- The Labors of Hercules; The Story of the Trojan Horse

The Core Knowledge Foundation encourages schools to *integrate content and skills* in a coherent sequence. By practicing skills in the context of important, engaging content, students are more likely to master the skills.

"It's the best year of teaching I have ever had. The year has been so much fun: fun to learn, fun to teach."

--Joanne Anderson, teacher,  
Three Oaks Elementary



# KNOWLEDGE BUILDS ON KNOWLEDGE

We learn new knowledge by building on what we already know. Students in Core Knowledge schools know a lot because they are offered a coherent sequence of specific knowledge that builds year by year. Thus, for example, in sixth grade, they should be ready to explain the phrase "Acquired traits are not transmitted" because they have been building the knowledge required to do this. You can see this year-by-year building of knowledge in the following selection of topics from the Life Sciences section of the *Core Knowledge Sequence*:

*Kindergarten:* Plants and plant growth.

*Grade 1:* Habitats. The Food Chain.

*Grade 2:* Life cycles. Reproduction in plants (from seed to seed) and animals (from egg to egg). Introduction to cells.

*Grade 3:* Ecosystems. The balance of nature. Producers, consumers, decomposers.

*Grade 4:* History of the earth. The fossil record. Development of plants and animals through major eras of "geologic time."

*Grade 5:* Cell structure and function. Life cycles: asexual and sexual reproduction.

*Grade 6:* Cell division: mitosis and meiosis. Genetics: chromosomes, DNA, genes. "Acquired traits are not transmitted."

## WHAT'S HARD DEPENDS ON WHAT YOU KNOW

The *Core Knowledge Sequence* provides specific building blocks of knowledge that allow students to proceed grade by grade to increasingly advanced levels of understanding. By sixth grade, for example, students who have made steady progress through the Core Knowledge curriculum should be prepared to

- discuss the causes and consequences of the Industrial Revolution

- understand how light behaves as both a wave and a particle

- compare the Greek myth of Orpheus and Eurydice with the Native American tale, "Coyote Goes to the Land of the Dead"

- understand the aesthetic significance of the Hagia Sophia; murals by Diego Rivera; and Michelangelo's "David"

- understand basic electrical circuits and Ohm's law

- compute the volume of a rectangular solid

- discuss the debate between Booker T. Washington and W. E. B. DuBois

- recognize the historical significance of Napoleon, Karl Marx, Simon Bolivar, Jose Marti, George Washington Carver, Susan B. Anthony, Ida B. Wells, and Theodore Roosevelt

# CORE KNOWLEDGE AND CULTURAL LITERACY

The Core Knowledge movement is the practical result of the ideas expressed in *Cultural Literacy: What Every American Needs to Know* (1987), by E. D. Hirsch, Jr., a professor at the University of Virginia.

In *Cultural Literacy*, Professor Hirsch demonstrated that true literacy requires not only skills of "decoding" (sounding out the

letters on the page) but also a broad range of background knowledge taken for granted by writers and speakers in the United States. To be culturally literate is to possess this broad range of background knowledge.

While the modern world may seem to be in a state of ceaseless change, communications about this world rest upon a foundation of solid, lasting knowledge. Examples of this taken-for-granted knowledge may be found everywhere. Sportscasters refer to uneven matches as "David and Goliath contests," or to the rise of an unexpected champion as "a Cinderella story." Banks advertise "variable interest rates." Newspapers refer to "trading competition from the Pacific Rim" or an "appellate court

decision" or a "threatened presidential veto."

"To be truly literate," Professor Hirsch noted, "citizens must be able to grasp the meaning of any piece of writing addressed to the general reader." To grasp the meaning, one must have the assumed knowledge. To lack this assumed knowledge is to be excluded from understanding many messages sent by various media, and thus to be excluded from full participation in our national life.

To encourage greater inclusion in our national literate culture, the Core Knowledge Foundation urges schools to teach a solid core of literate knowledge, and so to ensure that our schools prepare truly literate Americans. The model curriculum guidelines offered in the *Core Knowledge Sequence* are a first step toward the goals of greater inclusion and higher literacy.

*"In his landmark book Cultural Literacy,... Hirsch made it quite clear...that respect for cultural diversity is important but is best achieved when young people have adequate background knowledge of mainstream culture. In order for a truly democratic and economically sound society to be maintained, young people must have access to the best knowledge available so that they can understand the issues, express their viewpoints, and act accordingly."*

--Dr. James P. Comer, Professor of Child Psychiatry, Yale University (in *Parents Magazine*, March 1991)

## Achieving Excellence and Fairness

For elementary schooling to be both excellent and fair, a school must follow a curriculum grounded in a solid core of knowledge that builds year by year.

When teachers do not share the common ground of a clearly defined curriculum, it often means that some students receive a more challenging and substantial education, while others--too often those from disadvantaged homes--are held to a lower standard. But, when we specify the knowledge that all children should share, we take a critical step toward guaranteeing equal access to that knowledge.



*"The thrust of Hirsch's proposal is egalitarian. He believes that by starting early and giving all children the same core knowledge to learn, we can prevent the creation of an educational underclass."*

--Albert Shanker, President, American Federation of Teachers (in *The New York Times*, Dec. 16, 1991)

# QUESTIONS

## and Answers About Core Knowledge

**D**oes the *Core Knowledge Sequence* specify everything a school should teach?

The *Sequence* is meant to comprise about 50% of a school's curriculum, thus providing some common ground for our diverse schools, while also leaving ample room for local requirements and emphases. Different schools have implemented the *Sequence* in a variety of ways, reflecting the different philosophies and teaching styles of individual teachers, and varied needs and strengths of individual students.

**W**ho decided what's in the *Sequence*?

Initial research on the *Sequence* was undertaken under the auspices of the non-profit Core Knowledge Foundation, founded in 1986 by E. D. Hirsch, Jr., a professor at the University of Virginia and author of *Cultural Literacy*. The *Sequence* represents the findings of research into the content and structure of elementary school curricula in various advanced industrialized nations that consistently do better than the United States on international comparisons of educational achievement (for example, France, Japan, Sweden, West Germany). The *Sequence* has gone through many drafts and reflects the criticism, advice, and contributions of many people. It represents a working consensus of diverse groups and interests, including teachers, parents, historians, scientists, and experts on America's multicultural traditions. The current *Sequence* has been revised in response to suggestions from teachers in Core Knowledge schools.

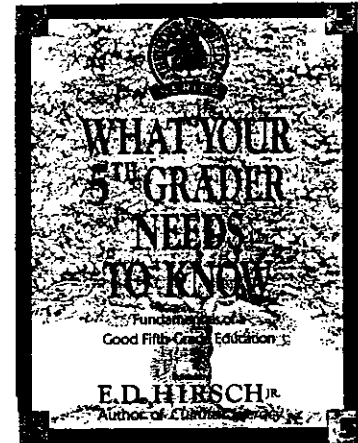
**H**ow do we teach the content specified in the *Sequence*?

The *Sequence* specifies what to teach, not how. The content may be organized and taught in a variety of ways. Each Core Knowledge school is unique: some use interdisciplinary teaching, some devote separate blocks of time to math, science, language arts, etc. At all these schools, common content still leaves great freedom for different methods.

**W**hat materials are available to help me teach Core Knowledge?

Many parents and teachers are reporting great success in working with the books based on the

*Core Knowledge Sequence*. These books in the *Core Knowledge Resource Series* are titled *What Your First [through Sixth] Grader Needs to Know*, and are published by Doubleday. Each book in the series offers an engaging, illustrated presentation of the content in the Core Knowledge curriculum. [Note: Earnings from sales of the books in the Core Knowledge Resources Series go to the non-profit Core Knowledge Foundation. E. D. Hirsch, Jr. receives no remuneration for editing the Series, nor any other remuneration from the Core Knowledge Foundation.]



The Foundation has prepared materials to help schools implement Core Knowledge, including sample lessons plans, and a *Resource Guide* that recommends hundreds of books that can help teachers bring Core Knowledge to life. The Foundation also offers workshops, and holds an annual national conference. (For more information on materials and workshops, please contact the Core Knowledge Foundation.)

**I**s Core Knowledge compatible with an emphasis on teaching "critical thinking"?

Absolutely. The *Core Knowledge Sequence* is not a list of facts to be memorized, but a model of a coherent body of knowledge necessary to *informed* critical thinking. Without knowledge about an issue or problem, you can't think critically about it—you can only have an uninformed opinion. Consider also how children can best learn to think critically. Is it by learning a set of abstract "questioning procedures" or "inferencing strategies"? Or rather, for example, by analyzing the contradiction between the principle expressed in the Declaration of Independence that "all men are created equal" and the existence of slavery at the time?

**Is Core Knowledge developmentally appropriate?**

Yes. Children in Core Knowledge schools express great enthusiasm for what they are learning. The Core Knowledge curriculum feeds children's hunger to know more about the world around them, and about far-off people and places, both past and present. A principal of a Core Knowledge school in the Bronx (Jeffrey Litt, Mohegan School) reports that "the kids jump out of their seats because they want to show what they know. They want to question visitors when the visitors come to their rooms. That doesn't typically go on in New York City public schools."

**Why focus on elementary school?**

Many problems in secondary schooling have their roots in elementary school. It is important to begin building strong foundations of knowledge in the early grades because that is when children are most receptive, and because academic deficiencies in the first six grades can permanently impair the quality of later schooling.

**What is the relation between the Core Knowledge Sequence and current federal government efforts to define "national standards"?**

In general, the national standards do not offer guidelines as specific and detailed as those provided in the *Core Knowledge Sequence*. Whatever the national standards, schools using Core Knowledge can be confident that their programs will meet or exceed those standards.

The Core Knowledge Foundation is a non-profit organization. Contributions are tax deductible. For more information or to order resources, please write or call.

**The Core Knowledge Foundation**  
2012-B Morton Drive  
Charlottesville, VA 22903  
(804) 977-7550  
FAX (804) 977-0021

## CORE KNOWLEDGE SCHOOLS

Over 150 schools in 30 states have implemented or are phasing in Core Knowledge programs. Schools using Core Knowledge are remarkably diverse, encompassing urban schools in the South Bronx, rural schools in the Mississippi Delta, suburban schools in Florida and Washington, Catholic schools, Jewish academies, private day schools, etc.

These schools include:

**Florida:** Three Oaks Elementary in Ft. Myers became the nation's first Core Knowledge school in the fall of 1990. Since then, Three Oaks has been joined by schools in Sarasota, Tampa, Key Biscayne, and Miami.

**New York:** Mohegan School (CS 67) in the South Bronx, serving a population of Latino and African American students, began teaching Core Knowledge in the fall of 1991. Two other South Bronx schools are following Mohegan's lead.

**Texas:** Hawthorne Elementary in San Antonio, with a 90% Mexican-American student population, implemented a Core Knowledge program in 1992, and has been joined by a number of other Texas schools, including six in San Antonio.

**Washington:** In the Fall of 1993, Ridge View Elementary in Kennewick opened as a new school committed to teaching the Core Knowledge curriculum.

**Colorado:** In Ft. Collins, a school of choice created largely in response to demand from parents opened in the Fall of '93, and is called the Washington Core Knowledge School. Since then, a number of "charter schools" have opened, all following the Core Knowledge curriculum.

**Indiana:** In Richmond, Taylorsville, and Indianapolis, a diverse range of schools—from rural to suburban to urban—are using Core Knowledge.

**Mississippi:** Core Knowledge is being taught in the primary grades in Tupelo and in K-4 at four schools elsewhere serving primarily African American students from disadvantaged homes.

**Oklahoma:** Teachers and principals at a number of schools in Oklahoma City have been working together to support Core Knowledge programs in their schools.

**Elsewhere in the nation:** Core Knowledge is being taught at schools in Alabama, Arizona, California, Georgia, Illinois, Louisiana, Massachusetts, Maryland, Montana, Nebraska, New Hampshire, North Carolina, North Dakota, Ohio, Pennsylvania, Tennessee, Virginia, and West Virginia. Many of these schools are engaged in a variety of reform efforts but have turned to Core Knowledge to ensure that their children receive strong foundations of important knowledge crucial to adult literacy and lifelong learning.

The most experienced and fully committed Core Knowledge schools are reporting:

- increased professional collaboration
- improved standardized test scores
- tremendous student and parent enthusiasm.

# New day for N.C. schools

BY PETER H. MORCOMBE

**CARRBORO**—Fourteen years ago, I emigrated to the United States from the United Kingdom. One of the first things that I did was to buy an automobile made in Detroit. It was by far the worst motor car that I have ever owned. After months of fruitless efforts to fix it, I concluded that there were fundamental design flaws, traded it in and bought a Japanese car. The whole experience was so disagreeable that I shunned American cars for more than a decade.

Last year, I bought a Plymouth Voyager. It is a superbly designed vehicle and I could not be more delighted with it. Something has changed since 1982. I am probably even harder to please than back then, so it seems that the U.S. automobile industry has cleaned up its act.

Did they do this because of complaints from customers like me? I don't think so. However, when enough of us bought imported cars, they got the message. Such is the power of competition.

Fourteen years ago, I put three of my sons into public schools in New Jersey. I was bowled over by the excellent

facilities, friendly staff and much more. On the surface, these schools seemed so much better than anything that I had seen in England or Ireland.

## POINT OF VIEW

There was only one problem. My kids were not learning anything. They were at least a year ahead of their peers, and when the school administrators refused to challenge my kids, I put them into a private parochial school.

In 1982, British government schools compared very badly with their French, and German equivalents, so it was quite a shock to find out that my children were so far ahead of their contemporaries in the United States.

Today, I live in North Carolina, and the government schools are even worse than those in New Jersey.

Fortunately, our legislators in Raleigh have recognized this problem and have decided that our schools will benefit from competition, just as the American automobile industry has.

Their approach has been to decentralize. The State Board of Education, led by Jay Robinson, is encouraging schools to manage themselves (New ABCs of Public Education), and has sharply reduced staff levels in the Department of Public Instruction. This is the first step toward breaking up the public education monopoly.

The most extreme form of decentralization, so far, is the introduction of "charter schools." House Bill 955, passed by the legislature this summer, provides for the establishment of up to 100 independent public schools.

While such schools will have the same basic funding as other public schools, they cannot compel students to attend. They will only survive if parents are convinced that their children will benefit. This competitive pressure ensures that charter schools will try harder.

The term "charter schools" is just a new name for independent public schools. A century ago, most of our schools had the kind of independence that modern charter schools enjoy. Our highly centralized school management system gained momentum in the 1960s. It is based on a factory model that touts economies of scale, through creating large schools.

This approach has led to a free fall in academic achievement, discipline and parental satisfaction. Today, even though we have extraordinary advantages through new technology, such as personal computers, many holders of high school diplomas lack the numeracy and literacy skills needed to succeed in the job market.

Many states already have charter schools. Progress to date has been remarkable; there are now about 400 such schools in the United States. In the United Kingdom, charter schools were strongly encouraged following the Education Reform Act of 1988. There are more than 1,100 charter schools, with 700,000 students, in the UK.

And British charter schools perform significantly better than other public schools. Even more welcome is the fact that since 1988, the performance of British non-charter schools has risen dramatically. This seems to support the notion that competition helps to improve performance.

I hope that parents will realize that something wonderful is about to happen in North Carolina, and will give their wholehearted support to the charter school movement.

*Peter H. Morcombe lives in Carrboro and works as an electrical engineer at Duke University's Free Electron Laser Lab.*

Public Service Announcement  
on WCHL, starting October 7, 1996  
by Louise Cole

CHARTER SCHOOLS

It looks like the charter school applications are moving along at a very good clip. We will have them ready by the end of October. Remember that Charter Schools are independent public schools which are exempt from most public school regulations, covering curriculum, discipline, and administration. About 400 charter schools have been set up nation wide. All of them have long waiting lists. Common themes are the provision of a safe environment, enriched academic programs, and parent volunteerism. While the goal of charter schools is to educate, they are not told how to get there. The specific approach is determined by the parents and the teachers.

Charter schools are better able to meet the expectations of the local neighborhood and community. Students do not attend through "districting", since parents can choose another public school. This forces charter schools to work harder for their students and customers.

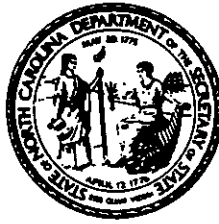
Charter schools have already strengthened public education by their own achievements, and by stimulating public schools with a little friendly competition. Nationally, they do better.

Our proposals are almost ready and our next public meeting will be on Thursday, October 10th at 7:30 p.m. in Carrboro Town Hall. Come and find out more about this exciting opportunity for our children. That's Thursday, October 10th at 7:30 p.m. in Carrboro Town Hall.

For more information, call 967-1029. This is Louise Cole.



# STATE OF NORTH CAROLINA



Department of The  
Secretary of State

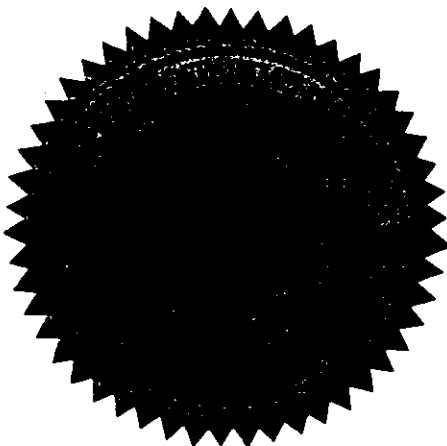
To all whom these presents shall come, Greetings:

I, **JANICE H. FAULKNER**, *Secretary of State of the State of North Carolina*, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION  
OF  
FINANCIAL REFORM FOR EXCELLENCE IN EDUCATION

*the original of which was filed in this office on the 10th day of October, 1996.*

*IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 10th day of October, 1996.*



*Janice H. Faulkner*  
Secretary of State

State of North Carolina  
Department of the Secretary of State

C-0408046

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ARTICLES OF INCORPORATION  
NONPROFIT CORPORATION

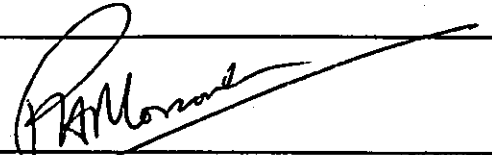
EFFECTIVE  
JANICE H. FAULKNER  
SECRETARY OF STATE  
NORTH CAROLINA

Pursuant to Section 55A-2-02 of the General Statutes of North Carolina, the undersigned corporation does hereby submit these Articles of Incorporation for the purpose of forming a nonprofit corporation.

1. The name of the corporation is: FINANCIAL REFORM FOR EXCELLENCE IN EDUCATION
2. ☒ (Check only if applicable.) The corporation is a charitable or religious corporation as defined in N.C.G.S. Section 55A-1-40(4).
3. The street address and county of the initial registered office of the corporation is:  
Number and Street 200 STAGS TRAIL  
City, State, Zip Code CHAPEL HILL, NC 27516 County CHATHAM
4. The mailing address *if different from the street address* of the initial registered office is:  
\_\_\_\_\_
5. The name of the initial registered agent is:  
ROGER ALAIN GERBER
6. The name and address of each incorporator is as follows:  
PETER HALEY MORCOMBE  
110 LISA DRIVE  
CARRBORO, NC 27510
7. (Check either a or b below.).  
a. ☒ The corporation will have members.  
b. ☐ The corporation will not have members.
8. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.
9. Any other provisions which the corporation elects to include are attached.
10. The street address and county of the principal office of the corporation is:  
200 STAGS TRAIL, CHAPEL HILL, NC 27516 County CHATHAM
11. The mailing address *if different from the street address* of the principal office is:  
\_\_\_\_\_

12. These articles will be effective upon filing, unless a later time and/or date is specified: \_\_\_\_\_

This is the 23 day of SEPTEMBER 1996

  
\_\_\_\_\_  
Signature of Incorporator

PETER HALEY MORCOMBE VICE-P  
Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$50. This document and one exact or conformed copy of these articles must be filed with the Secretary of State. (Revised July 1994)

CORPORATIONS DIVISION

300 N. SALISBURY STREET

RALEIGH, NC 27603-5909

**FINANCIAL REFORM  
for  
EXCELLENCE in EDUCATION**

200 Stags Trail  
Chapel Hill, NC 27516-7310  
(919) 967-1029

*Provisions regarding the distribution of the corporation's assets  
upon its dissolution.*

In event of the dissolution of the corporation, the portion of its assets not derived from charter schools will be donated to another nonprofit corporation in North Carolina dedicated to the improvement of education.

In event of the dissolution of the corporation, the portion of its assets derived from a specific charter school will be deemed the property of the local school administrative unit in which that charter school is located. This is in compliance with the North Carolina Charter Schools Act of 1996 (HB 955) s 115C-238.29F General requirements Section (i) Assets, -- Upon dissolution of the charter school or upon the nonrenewal of the charter, all assets of the charter school shall be deemed the property of the local school administrative unit in which the charter school is located.

\*\*\*\*\*

BYLAWS  
of  
**Financial Reform for Excellence in Education**

***Article I : Name and Status.-***

Section 1. Name - The name of the organization is Financial Reform for Excellence in Education.

Section 2. Corporate and Tax Status - Financial Reform for Excellence in Education is a not-for-profit corporation organized under the laws of the State of North Carolina. Financial Reform for Excellence in Education is not empowered to engage directly or indirectly in any activity that would cause the corporation to be disqualified as a nonprofit corporation business within the meaning of 501 (c)(3) of the United States Internal Revenue Code.

***Article II : Offices.-***

Section 1. Registered Office - The registered office of Financial Reform for Excellence in Education shall be established and maintained at 200 Stags Trail, Chapel Hill, NC 27516 in the County of Chatham in the State of North Carolina.

Section 2. Registered Agent - The name of the initial registered agent is Roger Alain Gerber. 200 Stags Trail, Chapel Hill, NC 27516 in the County of Chatham in the State of North Carolina.

Section 3. Other Offices - The corporation may have other offices within the State of North Carolina at such place or places as the Board of Directors may from time to time appoint or the business of the corporation may require.

***Article III : Purpose.-***

Section 1. General Purpose - The purpose of Financial Reform for Excellence in Education is to encourage and promote education excellence in primary and secondary (k through 12 ) schools.

Section 2. Means - A primary way Financial Reform for Excellence in Education endeavors to achieve its purpose is by establishing and maintaining charter schools pursuant to the North Carolina Charter Schools Act of 1996: HB 955.

#### ***Article IV : Members.-***

Section 1. Members - Financial Reform for Excellence in Education, as a nonprofit corporation, elects to have members.

Section 2. Founder Members - The four (4 ) founders of the corporation ( Louise Cole, Rebecca Coyne, Roger Gerber, and Peter Morcombe ) are thereby granted founder member status taking the rights and responsibilities as described in Article IV Section 4 of these bylaws.

Section 3. Founder Membership - Founder membership is limited to four (4 ). Founder membership may be resigned upon written receipt by the corporation of a member's resignation. If a founder member fails to perform required duties or is deemed detrimental to the stated purpose of the corporation, his or her founder membership may be revoked by a three fourths (3/4 ) vote of the founder members only. Founder vacancies are to be filled within sixty (60) days of the occurrence of such vacancy by the unanimous vote of the remaining founder members.

Section 4. Founder Member Duties - It is the duty of the founder members to elect directors to the Board of Directors. The founder members will determine the appropriate number of directors needed within the limitations of Article V : Section 2 of these bylaws. The election of the directors needs unanimous approval of the sitting founder members. Founder members may, but do not have to, serve as directors.

Section 5. Founder Member Meetings - Meetings will be called as needed to comply with the responsibilities of the membership. All actions will be written and signed by the founder members within a forty-eight (48 ) hour period, thus permitting decisions to be made by absentee ballot. All motions ( except those specifically noted in Article IV Section 3 and Section 4 ) will need a seventy-five percent (75%) majority vote in order to be ratified.

Section 6. Other Members - The corporation through the board of directors reserves the right to establish other membership classifications with their own rights and responsibilities.

Section 7. Compensation - Founding Members may not be compensated for services rendered while fulfilling their duties as Founding Members.

#### ***Article V : Board of Directors. -***

Section 1. Designation - The directors are responsible for the care and management of the corporation, including policy oversight of corporate, legal, financial and administrative issues, and compliance with both federal and state regulations including managing

corporation finances and ensuring adequacy of funding. The Board of Directors may do all acts permitted by law to be done by a North Carolina nonprofit corporation.

Section 2. Number and Term - The Board shall consist of four (4 ) to twelve ( 12 ) directors serving one (1 ) year terms concurrent with the corporation's fiscal year.

Section 3. Director Status - A director may resign his office upon written receipt by the corporation of that director's resignation. A director may be removed from office by unanimous vote of the Founder Members.

Section 4. Decision-Making Process - Each director shall be entitled to one vote on any matter submitted to the Board. A quorum is defined to be 66% of the Board. Voting is by simple majority of all members present at a meeting with a quorum unless defined otherwise. Each director may vote in writing on any matter provided he receives a written statement concerning the matter to be voted on and that such vote occurs in a timely manner, the exact procedure to be determined on a case by case basis by the directors. Proxies are allowed - either electronic or in-person - as long as the Chair has prior notice of the proxy. Written ballots are required for decisions of substance (at the Chair's discretion) or for personnel decisions and elections. In the event of a question of order or procedure which arises and is not covered in these bylaws, the ruling of the Chair shall be binding.

Section 5. Offices - The directors shall elect a Chair from among its membership for a one-year term. The Chair is responsible for: moderating meetings; ensuring fairness of the meetings; setting meeting agenda; and soliciting topics/issues. The directors shall elect a Vice Chair from among its membership for a one-year term. The Vice Chair is responsible for: assisting the Chair as requested thereby; and filling in when the Chair is absent. The directors shall elect a Secretary from among its membership for a one-year term. The Secretary is responsible for: sending meeting notices and arranging meeting location; preparing meeting agendas; preparing and distributing appropriate records and minutes of meetings; collecting votes; preparing and maintaining the corporate books and records; and ensuring a quorum is achieved for any meeting.

Section 6. Meetings - The Board of Directors will hold an annual meeting each June in concurrence with the end of the corporation's fiscal year. Other meetings will occur according to the board's discretion.

Section 7. Executive Committee - The Board of Directors shall elect an Executive Committee to act in its behalf, subject to any restrictions contained in these bylaws or imposed by the Board of Directors, between regularly scheduled meetings. The Executive Committee shall consist of an Executive Director, Secretary, Treasurer, and any number of additional members the Board deems necessary. Founding Members and Directors of the Board may serve on and/or be employed by the Executive Committee.

Section 8. Advisory Board - The Board of Directors shall elect members of the Advisory Board, the term, duties, and number of advisory board members to be determined by the Board of Directors.

Section 9. Task Forces - Task Forces of the Corporation may be established by the Board from time to time.

Section 10. Compensation - For service on the Board of Directors, Advisory Board, or Task Forces of the corporation; no compensation shall be received, except that reasonable expenses for assignments undertaken on behalf of the corporation may be reimbursed as circumstances permit and pursuant to policies of the Board of Directors.

#### ***Article VI : Executive Committee.-***

Section 1. Duties - The Executive Committee shall be responsible for administering the work of the Corporation pursuant to directions of the Board.

Section 2. Executive Director - The Executive Director may sign and execute any deeds, mortgages, bonds, contracts, or other instruments that the Board of Directors shall authorize the Executive Director to execute or have delegated to his or her discretion to execute on behalf of the corporation. The Executive Director shall have administrative responsibility for other executive committee staff members.

Section 3. Secretary of Executive Committee - The Secretary shall keep accurate records of the acts and proceedings of all meetings. He shall give all notices required by law and by these bylaws. He shall have general charge of the corporate records and books and of the corporate seal to any lawfully executed instruments requiring it. He shall sign such instruments as may require his signature, and in general, shall perform all duties incident to the office of Secretary and such other duties as may be assigned to him from time to time by the Executive Director.

Section 4. Treasurer - The Treasurer shall have custody of all funds and securities belonging to the corporation and shall receive, deposit or disburse the same under the direction of the Board of Directors. He shall keep full and accurate accounts of the finances of the corporation in books especially provided for that purpose. The treasurer shall, in general, perform all duties incident to his office and such other duties as may be assigned to him from time to time by the Executive Director and the Board of Directors.

Section 5. Bonds - The Board of Directors may require any or all officers, agents and employees of the corporation to give bond to the corporation, with sufficient sureties, conditioned on the faithful performance of the duties of their respective offices or positions, and to comply with such other conditions as may from time to time be required by the Board of Directors.



***Article VII : AMENDMENTS.-***

Upon the recommendation of the Founding Members, these bylaws may be altered, amended or repealed by a three fourths (3/4) majority vote of the Founding Members voting at any meeting of the Founding Members. Notice of the meeting shall include a statement describing the subject matter of the proposed alteration, amendment or repeal and the article(s) to be affected thereby.

***Article VIII . INDEMNIFICATION.-***

Section 1. To the extent permitted by the laws of the State of North Carolina, as the same may be amended or superseded from time to time, the corporation shall indemnify any person made a party to an action by or in the right of the corporation to procure a judgment in its favor by reason of the fact that he or she, his or her testator or intestate is or was a Founding Member, Director, Officer, or employee of the corporation, against the reasonable expenses, including attorney's fees, actually and necessarily incurred by him or her in connection with the defense of such action, or in connection with an appeal if an appeal there is, except in relation to matters as to which such Director or Officer is adjudged to have breached his duty to the corporation under the State of North Carolina Nonprofit Corporation Act.

Section 2. The foregoing right of indemnification shall not be exclusive of other rights to which he or she may be entitled, and the corporation may purchase insurance as authorized by the Board of Directors for the purposes of indemnification as provided herein and to the full extent allowed by law.

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