



Office of **CHARTER SCHOOLS** NC Department of Public Instruction

2026 Charter Application Revision Discussion
September 2025 CSRB Meeting

Purpose: To determine and approve revisions to the North Carolina charter school application before it rolls out in January 2026. OCS's goal is to facilitate a transparent, understandable, and rigorous process that holds charter boards to high expectations resulting in quality charter schools.

What we've accomplished so far:

- All 17 sections of the current charter application have been reviewed and discussed in CSRB meetings from March 2025 to May 2025.
- Public comment has been solicited and provided to CSRB members.
- All meeting notes, public comments, and input from CSRB members has been summarized and synthesized into one document.

Next steps:

- Discuss revisions at the September meeting. OCS staff will finalize revisions based on this discussion, per instruction by CSRB members and CSRB will vote on the final revisions at the October meeting.
- The following have been provided to assist:
 1. A summary of received feedback
 2. A redlined version of the current application with suggested revisions
 3. This document detailing all redlined edits and suggestions by question and/or section number

General Feedback received by OCS

- Suggestion: Experienced Operator and New Operator applications.
 - OCS response: EMO/CMO operators should have a much easier time completing the application rather than being an excessive burden. We are unfortunately not in a position with staff/evaluator capacity or platform ability to have two different applications at this time.
- Suggestion: Ability to upload documents by section, rather than individually throughout the application.
 - OCS response: We will look into this with developers.
- Review: Consolidate similar questions to prevent the document from becoming overly lengthy. Many questions target the same idea, and fully answering the application often requires repeating information across sections of the application.
 - OCS response: Noted and we believe our suggestions herein improve this greatly.
- Review: Many questions and sections require a level of detail uncommon in other applications. For example, Question 202 asks applicants to "Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission and educational program. The plan should also outline how the school will fulfill the teacher certification and licensure requirements for teachers as mandated by state and federal law. Ensure that this overview aligns with the projected staff and funding outlined in the proposed budget section." This question is preceded by questions that require applications to identify the positions responsible for maintaining teacher license requirements and professional development, and followed by three additional questions about professional development.
 - OCS response: Noted and we believe our suggestions herein improve this greatly.
- Questions: Does the application have word or character counts? Are there areas of the application (additional questions/appendix items/etc.) that only become visible when a box is checked?
 - OCS Response: 750 word max for most questions. Yes, some portions only open when selected.

Redlined and Suggested Revisions by Section and Question
(Suggestion: Review this in conjunction with the redlined application provided)

Section 1 retitled to indicate this section also includes student enrollment information and to make student enrollment a more prominent and organized part of the first section.

Q5 Revised to allow up to 3 zip codes to prevent repetitive amendment requests during the RTO process when facility acquisition is difficult and often changing.

Q12 and Q13. Added state law requirement re: 80 minimum students.

Q15 was reworded for clarity.

Moved Q114 and 116 into this section
*Rationale: streamlines enrollment questions

Section 2: Non Profit Corporation Information

Move bylaws (currently in Section 11 Q183) to this section.

Move Articles of Incorporation (currently in Section 11 Q 184) to this section.

Section 3: Acceleration

Update language to reflect CSRB as opposed to SBE.

Consider if/how to solicit evidence of accelerated considerations/criteria listed in Q 32-39.

Section 4: Conversion

Remove Q 49 as Q 53-56 covers sufficiently.

Section 5: Replication

Update language to reflect CSRB as opposed to SBE. Updated fast-track language for clarity.

Section 6: Alternative

Q69 - add a narrative box with "Please provide a written narrative explaining which of the above alternative charter school requirement(s) will be met."

* Rationale: simply checking a box for the requirements being met is not sufficient for a high-quality application and makes evaluation more difficult.

Section 7: EMO/CMO

This is an area that needs to be addressed by the CSRB. OCS received multiple, often conflicting feedback regarding what should be included in this section.

Q73 added one sentence: Include a summary of what the board understands is being provided by the EMO/CMO and for what fee.

*Rationale: this question gets at whether the board understands the attached agreement and always comes up in interview so is a good starting point for discussion.

Q74 added: Are there additional services to be provided by the EMO/CMO that are not included in the management fee and for which the school will need to reimburse or pay the EMO/CMO? (This was suggested in feedback)

Q75 revised to: Were other management organizations considered?

*Rationale: the current Q is wordy and this gets to the point of the Q in fewer words.

Q76 split into 3 separate questions for better clarity. Remove "nationally, what are the highest and lowest performing schools of the EMO/CMO." See comments in redline document for more detail.

Q77 Remove "Describe how the governance structure will be affected and how the board 'will govern the school independently of the EMO/CMO.'" Instead, ask "how will the board ensure accountability?"

*Rationale per CSRB feedback: The answer to the first question is that if EMOs do not affect the governance, and the second suggests that boards will make policy decisions at odds with the management companies and the models they are hired to implement.

Q78 Suggestion: Specify relationship types that will exist between the EMO/CMO and the school's employees (e.g., teachers and staff are employees of the EMO, employees of the nonprofit, or employees of both)

- OCS rec'd several iterations of this Q in feedback. May consider what is the best, more concise way to ask this question.

Q79 Split original Question 79 into two separate questions. "Explain how the EMO/CMO contract includes measurable objectives whereby the charter school board can evaluate annually the performance of the EMO/CMO, and if necessary, terminate the contract without significant obstacles."

**This is not a new question. Both of these questions were previously one question, Q79 in the 2024 (2025) version application.

OCS rec'd conflicting feedback on this question so it needs to be addressed in board discussion. Here are examples of feedback:

Delete: Remove wording in question asking "how the school can terminate the EMO agreement without significant responsibilities"

- Rationale: Schools should not necessarily be allowed to terminate without consequences. EMOs often invest in schools in the early years of a school to get it off the ground. They do this with the understanding that they will be able to recoup that investment in the later years of the contract. That requires that they have a contract with a sufficiently long term, as well as provisions protecting their investment if the contract is terminated early.

Suggestion: Remove "Terminate the contract without significant obstacles." Instead, applicant should list specific steps involved in terminating the contract.

- Rationale: initial wording too vague

Q80

Suggestion: Remove "is the facility being provided by EMO/CMO?" Replace with "who will own the facility?"

- Rationale: the answer to this question will always be a no

Q81

Rec'd from feedback -

Suggestion: Add a narrative to explain the steps of a buyout, in addition to the Facility Buyout Agreement. Additionally, if the school intends to enter into a lease or enter into a lease-purchase agreement, then the agreement should be separately documented and should not be a part of or incorporated into the contract

Q82

Rec'd from feedback -

Delete: Remove "List the fund balances and surpluses for each school managed by EMO/CMO."

- Rationale: Often EMOs/CMOs agree to invest in schools for several years during their startups. This means that a school could be exceptionally well funded and

resourced, but have no fund balance. There are multiple reasons WHY the amount could vary.

Q83 + Q84

CSRB needs to determine what it would like applicants to provide in terms of financial history.

*Rationale: Previous years' applicants have submitted a wide variety of financial history documentation ranging from dozens of pages of financial data to one page from a bank stating the corporation is in good standing. OCS is attempting to make this question clearer and more consistent among applicants to ensure the financial stability of a management company seeking to partner with a charter board.

Rec'd conflicting feedback including:

Suggestion: Remove question entirely

- Rationale: This is not something they should have to provide, since the information is proprietary. The other questions should give enough information about financial stability and ability to perform, especially if the CMO/EMO has a track record

Q84

Rec'd feedback: Only CMOs should have to provide IRS form 990; privately held EMOs should not have to turn in their tax returns.

Additional suggestions received related to this section from solicitation of feedback:

Add question: "Has independent counsel for the BOD reviewed the draft or proposed management agreement?"

Add a listing of any lawsuits involving the EMO/CMO and their outcomes

Add a section including verification of any bankruptcy protection filing within the five years prior to execution of the contract by the EMO/CMO and/or any related organizations or organizations in which a principal or officer of the company served as a principal or officer.

The EMO/CMO section should require a list of contracts held with other NC charter schools both past and present.

Section 8: Remote Charter Academies

****The red-lined version is wonky and can't figure out how to fix but only a few areas to consider for this section.***

Suggestions from staff based on lack of understanding evident in previous remote applications especially regarding state testing requirements.

- Q99: Adding additional language, "including the devices being used or rented for required state testing windows."
- Q109: OCS suggests - Adding additional language, "and state testing requirements"
- Add new Question - "What is the proposed remote charter academy's plans for a facility to house testing materials, student records, and technology?"

Section 9: Mission, Purposes, and Goals

Revised mission statement and vision statement definitions to provide greater clarity for applicants.

Q114 and Q116 moved to the enrollment section.

Removed: Q115, Q117

Revised Q118 to require more specific evidence of demand. Applicants should have and be able to clearly articulate demand for its program.

Added a question (optional) to attach evidence of business, community support.

Q122 Remove or revise this question to focus on academics

- Rationale: responses usually address the 5-year academic goals. The finance goals are reflected in the 5-year budget, and the governance goals can be found in the Board's section.
- Founding principal should really have some input in these goals. Do they need to be in application? Could be addressed in 120 and 121.

Q123 Remove - can be determined in interview and is in board section

Section 10: Educational Plan

This section received little feedback, but has been revised based on OCS suggestions. Objectives are to reduce this section and create broader questions that better illustrate an applicant's educational plan.

Remove Q129-135

Suggest removing 6 questions and reformatting into three more targeted, broader questions that require a board to clearly understand the educational plan and philosophy of the school.

- What is your school's educational philosophy and how does it translate into your daily classroom practices and curriculum design?
 - This question gets at the foundational thinking behind their approach while requiring them to connect abstract philosophy to concrete implementation.
- Describe a typical day for students at different grade levels in your school, including how core subjects are integrated and what instructional methods teachers will primarily use.
 - This forces applicants to demonstrate their understanding of age-appropriate instruction while revealing their approach to subject integration, pacing, and pedagogical methods.
- How will your curriculum address the diverse learning needs and academic levels of students, and what systems will you have in place to monitor and adjust instruction based on student progress?
 - This question reveals their understanding of differentiation, assessment practices, and data-driven instruction.

Revised questions related to high school for clarity/brevity.

Remove attached curriculum, weekly schedules but keep yearly academic calendar.

Revised Q157 for clarity.

Add after Q163: Please explain if the school intends to utilize exclusion as a disciplinary consequence under its code of conduct. Exclusion or expulsion must abide by the due process required under N.C.G.S. § 115C-218.60 and the Charter Agreement. If the school intends to utilize exclusion or expulsion, please summarize the procedures by which students can be excluded from the charter school.

Section 11: Governance and Capacity

CSRB members have previously expressed the need to include a line of questioning specific to teacher evaluation and corrective action in addition to the current set of

licensure questions. CSRB members also previously discussed separating questions on teacher licensure and teacher evaluation.

Q179 revised

Q184 (Articles of Incorporation) removed and relocated to Section 2 (nonprofit information)

OCS suggested removals to reduce length of this section (see comments in redlines):
Q190, 191, 192, 195, 196

Section 12: Operations

CSRB members have previously expressed the need to include more specificity in the facilities section. Discussion at previous meetings included consideration to include total # classrooms, total square footage, cost per square footage, square footage per classroom, etc. to this section. Short and long term facility plan costs, types of classrooms, gymnasiums, cafeterias, labs and media centers.

Q226 suggest additional language re sources of information

Section 13: Financial

Suggest removal of Q233 and Q234 as duplicative of enrollment questions in previous sections.

Suggest removal of Q235.

Budget templates updates to include RCA line items

Section 14: Other Forms

Section 15: Third Party Application Preparation

Section 16: Application Fee

Section 17: Signature