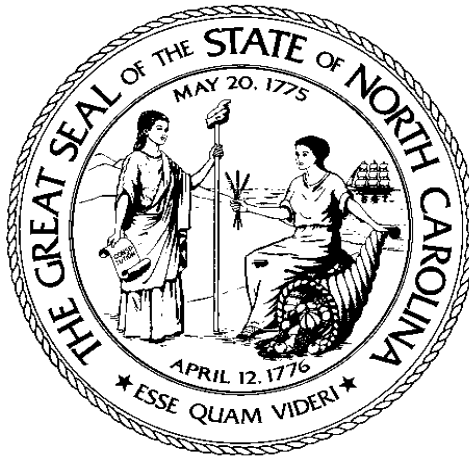


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Application Preliminary Evaluation Packet

For each section, please rate the response then explain your rating by specifying strengths and weaknesses in the space provided. Where applicable, you should elaborate on concerns by specifying additional information you would request or follow-up questions that you have.

- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets minimum components as evidenced by the check boxes of the rubric.
- § Fail: The response either fails to entirely address the selection criteria or addresses some of the criteria. The responses lack adequate detail and/or raise substantial concerns about the applicant's preparation for and ability to start or operate a charter school successfully. The application fails to address all of the minimum components as evidenced by the check boxes of the rubric.

Subcommittee Members:

Lisa Swinson
Eric Sanchez
Helen Nance
Tammi Sutton
Carol Ann Hudgens
Steven Walker
Kristen Vandawalker
Sherry Reeves
Mike McLaughlin
Kathryn Mullen Upton
Joe Maimone

Date of Review:

10/17/2014

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NORTH CAROLINA CHARTER SCHOOL APPLICATION

Fortis Academy

Public charter schools opening the fall of 2016

Due by 5:00 pm, September 26, 2014

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

Mailing Address:
6303 Mail Service Center
Raleigh, NC 27699-6303

**CHARTER SCHOOL
2014 Application Process**

To open a charter school in the 2016-2017 school year

APPLICATION DUE DATE/TIME

September 26, 2014 A complete *online* application package, in the Office of Charter Schools **by 5:00 pm EST.**

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

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

APPLICATION SPECIFICATIONS

Applicants can submit applications prior to the deadline September 26, 2014 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

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

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TABLE OF CONTENTS

I.	<u>APPLICATION CONTACT INFORMATION</u>	5
	Grade Levels Served and Total Student Enrollment:	6
	Concerns and Additional Questions	8
II.	<u>MISSION and PURPOSES</u>	9
	Mission:	9
	Educational need and Targeted Student Population of the Proposed Charter School:	9
	Purposes of the Proposed Charter School:	12
	Goals for the Proposed Charter School:	13
	Concerns and Additional Questions	17
III.	<u>EDUCATION PLAN</u>	18
	Instructional Program:	18
	Curriculum and Instructional Design:	19
	Special Programs and "At-Risk" Students	24
	Exceptional Children	27
	Student Performance Standards	30
	Student Conduct:	32
	Concerns and Additional Questions	34
IV.	<u>GOVERNANCE and CAPACITY</u>	37
	Governance:	37
	Governance and Organizational Structure of Private Non-Profit Organization:	37
	Proposed Management Organization (Educational Management Organization or Charter Management Organization)	43
	Private School Conversions:	43
	Projected Staff:	43
	Staffing Plans, Hiring, and Management	44
	Staff Evaluation and Professional Development	49
	Enrollment and Marketing:	52
	Marketing Plan	52
	Parent and Community Involvement	52
	Admissions Policy	53
	<u>PROJECTED ENROLLMENT</u>	55
	Concerns and Additional Questions	56
V.	<u>OPERATIONS</u>	57
	Transportation Plan:	57
	School Lunch Plan:	57
	Civil Liability and Insurance	58
	Health and Safety Requirements:	58
	Facility:	59
	Facility Contingency Plan:	60
	Concerns and Additional Questions	60
VI.	<u>FINANCIAL PLAN</u>	
	Budget: Revenue Projections from each LEA 2016-17	62
	Total Budget: Revenue Projections 2016-17 through 2020-2021	63
	Personnel Budget: Expenditure Projections 2016-17 through 2010-2021	64
	Operations Budget: Expenditure Projections	67
	Overall Budget:	69
	Budget Narrative:	69

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<u>Financial Compliance:</u>	<u>75</u>
<u>Concerns and Additional Questions</u>	<u>77</u>
<u>VII.</u>	
<u>AGREEMENT PAGE</u>	
<u>Application Fee:</u>	<u>79</u>
<u>Applicant Signature:</u>	<u>79</u>
<u>VIII.</u>	
<u>APPENDICES</u>	
<u>OVERALL ASSESSMENT</u>	<u>79</u>
<u>Total External Evaluator Votes</u>	<u>80</u>
<u>Total Subcommittee Votes</u>	
<u>CSAB Votes</u>	<u>80</u>
<u>Initial Screening</u>	<u>81</u>
<u>External Evaluator</u>	<u>81</u>
<u>Charter School Advisory Board Subcommittee</u>	<u>91</u>
<u>Overall Summary</u>	<u>92</u>

I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: *Fortis Academy*

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

Name of non-profit organization under which charter will be organized or operated: *Fortis Academy, Inc.*

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

Name of contact person: *Dylan Parkes*

Title/Relationship to nonprofit: *Founder*

Mailing address: 181 6th St. Northeast Apt. 413
Winston Salem NC 27101

Primary telephone: 828-289-1769 Alternative telephone: 888-619-6688

E-Mail address: *dylan.parkes@gmail.com*

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

County: *DAVIDSON*

LEA: *291-Lexington City Schools*

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

No:

Yes:

If so, provide the name of the third party person or group. *Prestige Preparatory Schools*

List the fee provided to the third party person or group. **None**

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

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Prestige Preparatory Schools reviewed our application once we had finalized each section. They gave us technical advice, helped us with wording and provided constructive feedback on how best to serve special populations and describe our key innovations. Prestige double-checked our budget and pointed out areas that needed a second look. They also permitted us to use their resource for performing criminal background checks. Prestige has provided us with valuable support in the application process but has not dictated language, drafted sections or required that Fortis use a specific curriculum.

If the application is approved, Prestige will serve us in a best-practices consulting capacity through our planning year and our first three years of operation. They are not a management company. They do not receive any compensation from us prior to opening.

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

No:

Yes:

Submit the following evidences (Appendix A) to support the conversion of the traditional public to a charter school:

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

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

<i>Financial History YR2011</i>	<i>Financial History YR2012</i>	<i>Financial History YR2013</i>
---------------------------------	---------------------------------	---------------------------------

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

No:

Yes:

What is the name of the nonprofit organization that governs this charter school? Fortis Academy, Inc.

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

Grade Levels Served and Total Student Enrollment:

Projected School Opening: Year 2016 *Month* August

Will this school operate on a year round schedule?

No:

Yes:

Proposed Grade Levels Served and Total Student Enrollment (
5

Years)

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Academic School Year	Grade Levels	Total Projected Student Enrollment
First Year	K,01,02,03,04,05,06	462
Second Year	K,01,02,03,04,05,06,07	528
Third Year	K,01,02,03,04,05,06,07,08	594
Fourth Year	K,01,02,03,04,05,06,07,08	616
Fifth Year	K,01,02,03,04,05,06,07,08	638

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

I certify that I have the authority to submit this application, that the initial board members and I were regularly involved in the development of this application, and that no part of this application is plagiarized. All information contained herein is complete and accurate. I realize that any misrepresentation will result in disqualification from the application process or revocation after award. I understand that incomplete applications will not be considered. The person named as the contact person for the application is so authorized to serve as the primary contact for this application on behalf of the non-profit organization.

dparkes12
Signature

Founder _____
Title

dparkes12 _____
Printed Name

09/26/2014 _____
Date

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Section I: Application Contact Information Concerns and Additional Questions	<u>Reviewer</u>	<u>Page Reference</u>
<u>Verify: what will be paid to Prestige AFTER opening</u>	<u>Kristen Vandawalker</u>	<u>Cover Page</u>
<u>Verify: Increases 66 students per grade level added, then 22 students in years 4 and 5? What's the logic?</u>	<u>Kristen Vandawalker</u>	<u>Grade Levels</u>
<u>The survey responses in Appendix A indicated support, but did not indicate how many individuals would be likely to enroll their child(ren) in the proposed school.</u>	<u>Kathryn Mullen Upton</u>	<u>Grade Levels</u>

<u>Reviewer</u>	<u>Score</u>
<u>Lisa Swinson</u>	<u>Pass</u>
<u>Eric Sanchez</u>	
<u>Helen Nance</u>	
<u>Tammi Sutton</u>	
<u>Carol Ann Hudgens</u>	
<u>Steven Walker</u>	
<u>Kristen Vandawalker</u>	
<u>Sherry Reeves</u>	
<u>Mike McLaughlin</u>	
<u>Kathryn Mullen Upton</u>	<u>Pass</u>
<u>Joe Maimone</u>	

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II. MISSION and PURPOSES

(No more than three total pages in this section)

Mission:

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

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

Fortis Academy endeavors to integrate the academic habits of a scholar with the devotion to physical health of an athlete thereby creating articulate, physically fit competitors who are prepared for the academic and career challenges ahead.

Clearly describe the mission of the proposed charter school:

Our mission is carried out by instructing students in the scholarly rigor of the classical Trivium while simultaneously training them in the physical rigor of a healthy diet and an active lifestyle, thereby enabling them to make a meaningful connection between mind, body and spirit. Our goal is to create physically fit, young intellectuals who achieve at an elite level in their academic and career pursuits.

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

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

In 2013, North Carolina End of Grade test results from Lexington City Schools showed 29.6% of students in grades 3-8 were at or above grade level in reading and 25.5% were at or above grade level in mathematics. Statewide, 43.9% of 3rd-8th graders scored at or above grade level in reading and 42.3% scored at or above grade level in mathematics. When compared to student performance in the surrounding community in Davidson County, Lexington City School students lagged even farther behind. Davidson County is a culturally and economically diverse community with several segments of minority populations represented. Davidson County test results show representative academic improvement among many diverse segments of the population, however, Lexington City shows virtually none of those student populations groups performing above the state level or showing adequate academic improvement. In a recent interview with the Davidson County Dispatch, Lexington schools superintendent, Rick Kriesky asked and answered his own question when he said, "Do we have a ways to go in increasing growth in our students? Absolutely. We do have challenges." Fortis Academy is up for that challenge.

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Throughout the nation, we have witnessed a growing intensity and sense of urgency in the dialogue over health and wellness. One topic that is ubiquitous in this debate is that of childhood obesity, a growing epidemic in the US. Obesity affects 30% of US adults, a statistic that is accurately reflected in North Carolina where at least 30% of the population is reported as obese and a staggering 64% are classified as chronically overweight in a 2009 report published by the NC Department of Health and Human Services entitled, "The Burden of Obesity in North Carolina". The same study placed North Carolina 5th in the nation in childhood obesity. Studies have linked obesity in children to other disorders such as ADD and ADHD and report drastic increases in diabetes and heart disease risks. Unfortunately, obesity is indiscriminate with regard to race, creed, or economics and the lack of knowledge about fitness and health affects people of all backgrounds. Fortis Academy believes that any student from any background that is well educated about their health and fitness, understands the components of proper nutrition, and engages their body in consistent, regular movement will have the tools necessary to combat these major health issues, reduce the risk of major disease, and live healthier, more productive lives. We believe that all students deserve an education that takes instruction beyond the chalkboard and onto the playground.

Fortis Academy will be a tuition-free public charter school in Lexington, North Carolina. We will seek out students regardless of size, shape, race, creed, or background who want access to a world-class classical curriculum that incorporates fitness, wellness, and nutrition as pillars of a complete education. We seek to serve students along a broad spectrum, from those who are struggling in their current situation to those who are succeeding but demand more from their education.

Many students in Lexington underperform their peers academically at every age level and demographic and childhood obesity rates in the area are among the highest in the State. Fortis Academy will offer students in Lexington, Thomasville and greater Davidson County the opportunity to sharpen their minds, shape their bodies helping them to finally compete and win in the job market or in higher education.

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

Total projected enrollment at Fortis Academy for the first year is 462 students in K-6 expanding to 594 in grades K-8 by year three, reaching enrollment of 638 students by 2020.

Combined K-8 enrollment for Lexington City Schools Davidson County Schools and Thomasville City Schools is 19,808. We will be marketing to and serving families in the Lexington, Davidson, and Thomasville LEAs, and expect to draw 70% of our students from within Lexington, 20% from Davidson County and 10% from Thomasville City. Therefore, in Year 1, Fortiss enrollment will represent 2.3% of the combined ADM of the three districts. In 5 years, assuming no growth in the school districts, Fortis Academy enrollment will be 3.2% of the combined K-8 ADM of Lexington City, Davidson County, and Thomasville City LEAs.

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These impact numbers do not include students who are home-schooled or currently enrolled in private education. According to data compiled by the NC Department of Administration, 10.6% of Davidson County, Lexington City and Thomasville City students were home-schooled during the 2011-12 school year. This compares with a statewide homeschooling average of 6.5%. Additionally, approximately 1,000 Davidson County students attend private schools or charter schools in other areas, according to the Department of Non-Public Instruction.

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

The educational plan for Fortis Academy will compare to the local public school models in that the primary academic program will align with Common Core Standards and Fortis Academy will serve all students, regardless of race, ethnicity or economics. These common purposes notwithstanding, Fortis Academy will differ greatly from the traditional public model in Lexington, Thomasville and greater Davidson County.

Fortis builds its program on three pillars: educating the mind using the classical education model, enlivening the body using motion and exercise and improving health by eating for wellness. These three pillars build upon one another and are visibly interwoven throughout the day.

The academic pillar of the Fortis model is grounded in classical education, an educational approach that revisits and employs the best educational ideas, those that are tried, proven and true. We will return to the Trivium (meaning "Three Ways"). Fortis grammar school students in Kindergarten through fourth grade will sing and clap out history timelines, science facts, Latin vocabulary and rules of grammar. Our logic (or dialectic) students in grades 5, 6 and part of 7 will spend much of their day challenging and debating their instructional coaches, who will in turn encourage this debate but encourage them not just to debate, but to debate well. And when one observes our students from the middle of their seventh grade year onward, they will discover students who are well versed in grammar and logic and who are weaving those skills into compositions, technical writing, artistic expression and oratory expositions.

The physical fitness and conditioning pillar of our education plan represents the greatest difference compared to other local public schools. Each entering student will receive an assessment from our trained strength and conditioning staff. This assessment is non-judgmental and serves as a starting point. Students will be given a baseline and will work with their coaches to set personal goals for the year tailored to their specific needs and structured to accommodate and encourage students of all shapes, sizes, disabilities, abilities, medical conditions, likes and dislikes.

Fortis Academy students will have three movement periods a day: one in the morning upon arrival, one before mealtime, and one before leaving school. Their progress will be coached and guided guaranteeing safety and success for each child. Students will note their achievements individually, but Fortis will also have group-based and grade-based benchmarks measured throughout the year where student athletes document their fitness and health progress using standard fitness measures of locomotor skills, stability, functional movement, cardiovascular endurance and physical fitness

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knowledge. This physical movement is not limited to movement periods. Faculty will be expected to incorporate movement into each class.

The final, differentiating pillar of Fortis' education model is nutrition. Although its the smallest piece in terms of dedicated time, it is by far the most important. We believe that by increasing knowledge of and providing access to high-quality, nutritious food our students will learn to eat for lifelong health. In doing so, we expect to observe gains in our students focus and energy levels and in their cognitive function. Our child nutrition program will be educational, inclusive, and nutrient dense. Since every student will be required to participate, Fortis Academy has allocated budget funds to ensure that it is not cost-prohibitive for any student.

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

Purposes of the Proposed Charter School: *In one page or less, describe how the proposed charter school will achieve one or more of the six legislated purposes, as specifically addressed in the NC charter school statute GS 115C-238.29A, and the proposed school's operations.*

The Six Legislative Purposes of a Charter School are:

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

1. The cornerstone of Fortis Academy is a central ethos of rigorous academics integrated with physical health and wellness. Fortis will foster an environment that gives teachers the incentive to improve their command of classical instruction as well as the opportunities to improve their own health with the goal of harnessing those improvements to elevate the quality of instruction and to advance the mission of Fortis Academy. Every faculty member at Fortis, regardless of the subject(s) taught, will be referred to as "Coach" (e.g. English Coach, Math Coach, etc.), denoting a professional who is concerned with the advancement of the entire team by focusing on the achievement and specific needs of the individual players (i.e. students). Fortis coaches will be provided with resources aimed at assisting them in meeting their own health and fitness goals, thereby enabling them to teach by example. Faculty will be taught how to begin, maintain or accelerate a personal wellness program and will have access to ongoing support and encouragement from personal trainers and nutritionists. In addition, prior

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to the start of school, the entire Fortis faculty will take part in a 3-day classical education seminar presented by Dr. Christopher Perrin, one of the foremost experts in Classical Education and Classical Instruction. Fortis will also establish membership for its academic coaches in the Society for Classical Learning ("SCL") which will avail them to professional development opportunities and resources including the SCL journal, online access to audio recordings of continuing education retreats and annual attendance at the SCL conference. Lastly, Fortis will make it possible for faculty and staff to seek accreditation or certification in personal training, nutrition and dietetics through the National Academy of Sports Medicine and the American Nutrition Association. We aim to encourage and provide these incentives alongside the traditional professional development mandated by the state, thus ensuring Fortis faculty has a myriad of opportunities for growth. We believe that these professional opportunities will inspire the faculty and staff of Fortis Academy to become personally invested in the success of every student and, in turn, the school as a whole. And as Fortis believes in accountability, we will give coaches a chance to demonstrate their investment in themselves and the school by giving them more autonomy over the design of daily class protocol and curriculum implementation during the building phase and our first year. Fortis teachers will be given ample opportunities to influence how we deliver our mission.

3. The average median income for Lexington City is \$29,000 a year, a full one-third less than the surrounding county. Thus for a majority of parents, financially, their only choice for educating their kids is to send them to the public school for which they are districted. There are four elementary schools that are district specific that feed into one middle school and one high school in Lexington, all of which are underperforming by all state standards. The lack of options and the lack of quality in the educational landscape are apparent from kindergarten onward. Fortis offers a classical curriculum that is established, proven, and not currently available. Fortis offers more physical activity daily than anything offered. Fortis offers a nutrition program grounded in modern science and sustainable practices. Fortis offers an environment of personal accountability, consistent message, and support for the body and mind. The Fortis model, with its classical structure and devotion to health and fitness offers parents and students a model that doesn't reflect the current system they are in and therefore provides them with a true choice: a choice in curriculum, a choice in priorities, and a real choice in how they educate their child.

Goals for the Proposed Charter School:

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

ACADEMIC GOALS

Fortis Academy will elevate standards of performance and establish goals alongside the NC accountability model, using state tests (EOGs and EOCs) and nationally normed assessments such as the NWEA-MAP as a basis for measuring academic progress. Annual progress toward meeting these goals will be monitored by the Board as well as by the administration and faculty of Fortis Academy.

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In 2013-2014, EOG results for Lexington City Schools indicated that only 34% of students achieved a Level 4 (solid command) or Level 5 (superior command). EOC results for the same year showed nearly 55% of students in Lexington City Schools had only partial or limited command of the subject matter and fewer than 5% had superior command of subject matter. We have used this data to create realistic and attainable academic goals as follows:

Percentage of Fortis scholars achieving a rank of "solid command" (Level 4) or "superior command" (Level 5) on the NC End of Grade Test and the percentage of eighth grade scholars who will meet or exceed high school readiness indicators:

Year 1: >45%, N/A
Year 2: >55%, N/A
Year 3: >65%, >60%
Year 4: >75%, >70%
Year 5: >85%, >75%

Percentage of Fortis Scholars achieving NWEA-MAP Mathematics and Reading Scores above the national, mean RiT scores and the percentage of Fortis Scholars achieving growth over prior year NWEA-MAP Mathematics and Reading RiT scores

Year 1: N/A - Baseline Year
Year 2: >50%, >70%
Year 3: >60%, >80%
Year 4: >65%, >90%
Year 5: >75%, >90%

WELLNESS GOALS

We will assess the health and fitness of Fortis scholars using quantitative and qualitative metrics. Fortis scholars will receive a health and fitness report card eight times throughout the school year. A comprehensive, annual report of Fortis scholar and coach wellness will be provided to the board and released to parents.

The 2014 US Report Card on Physical Activity for Children & Youth, published by the National Physical Activity Plan Alliance ("NPAPA"), indicated that only 24.8% of schoolchildren ages 6-15 attained 60 minutes or more of moderate-to-vigorous physical activity on at least 5 days of the week, representing a NPAPA score of "D-". The same report showed that 70.1% of children and youth ages 6-15 spend over 7 hours per day engaged in sedentary activities such as TV viewing and solitary engagement with a personal electronic/gaming device or computer, resulting in an NPAPA grade of "D". Using a number of assessments, including but not limited to the BMI measurement, the NPAPA health matrix, the SHAPE Assessment and absenteeism statistics, the following wellness goals have been established by Fortis:

Percentage of Fortis scholars who will demonstrate proficiency and competence in the locomotor, stability, movement and physical activity knowledge components of the annual SHAPE assessment:

Year 1: >50%
Year 2: >65%
Year 3: >75%
Year 4: >85%

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Year 5: >90%

Student body goal for NPAPA on Physical Activity, Active Play and Anti-Sedentary Behavior dimensions:

Year 1: Grade of "C" or higher

Year 2: Grade of "B" or higher

Year 3: Grade of "B" or higher and 40% of Fortis Scholars Achieve Grade of "A"

Year 4: Grade of "B" or higher and 60% of Fortis Scholars Achieve Grade of "A"

Year 5: Grade of "A"

Percentage reduction in illness-related absences:

Year 2: 10% over Year 1

Years 3-5: 5% over the prior year

OPERATIONAL AND FINANCE GOALS

Fortis will monitor progress in the areas of operations and finance using objective and subjective tools such as surveys and audit reports. Parents will be surveyed annually to determine their impression of the quality of the instructional program at Fortis as it relates to their child's academic coaches, the instructional content and the responsiveness of school leadership to concerns and questions. The goal will be to receive positive ratings from 90% of those surveyed. Fortis will operate with a balanced budget with the goal of increasing the fund reserve by 10% each year.

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

The Fortis Board will be kept apprised of student performance, academic achievement, financial health, operational success and other mission-oriented progress through use of a standardized, monthly report called the Operational and Academic Report ("OAR"). The OAR is a multi-part, Q&A based report that is compiled from input provided by the School Director, the Finance/Business Manager and the Lead Academic Coach that contains a leadership report, a financial report and an academic report from each respective contributor.

The OAR format is as follows:

SCHOOL LEADERSHIP: In the School Leadership section of the OAR, the principal is asked to respond to several prompts that provide information about:

- *Notable moments and success stories
- *Personnel issues and changes in personnel
- *Regulatory contact or regulatory matters
- *Legal matters
- *Parent Issues

ACADEMIC MATTERS: In the Academic Matters section of the OAR, the lead academic coach is asked to respond to prompts that address:

- *Academic and student wellness highlights since the last OAR submission.
- *Ongoing and upcoming standardized testing and assessments, including

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detailed results of those assessments

*Academic or curricular matters that require the Board's attention

FINANCIAL PERFORMANCE: In the Financial Performance section of the OAR, the Business Manager/Finance Officer is asked to submit a budget report and to respond to prompts regarding:

*Budget shortfalls or adjustments

*Any regulatory contact or matters (especially from the IRS or Dept of Revenue)

*Funding issues

The OAR is presented at each board meeting by the Principal and provides each Board member with a monthly snapshot of academic achievement, budget performance and other important school-wide metrics. The OAR is a simple tool that allows for the distillation of the most important information to be communicated monthly to the Fortis Board of Directors. The OAR will act as a component of a streamlined board meeting, allowing the board members to quickly identify areas of concern, ask questions and determine a course of action for those items within the OAR that require board intervention or higher-level planning and development. This method of reporting provides detailed, digestible data to the Board that permits them to easily discuss student progress and overall school health.

Although the OAR will provide a periodic summary of the schools progress in meeting its mission, it will be nearly impossible for a Board member to completely appreciate and understand the work being done at Fortis without actually spending time in the building and interacting with faculty, staff, students and parents. To that end, Fortis Board members will conduct "Fortis Forum Days" twice each year. Throughout this day, the Board, in a series of three, 90-minute panel discussions, will meet with each constituent group within the school - students, faculty/staff and parents to hear concerns and answer questions. The Fortis Forum Days provide Board members with the opportunity to hear the "unfiltered" perspective of each group, thereby enabling Board members to ascertain the effectiveness of the school and its progress in fulfilling its mission from the perspective of the various stakeholder groups being served.

Lastly, the Board will establish a relationship with the independent auditor early in the year and will review the annual audit report to ensure that financial goals are being met and that the business of the school is being managed responsibly and prudently.

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Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
<p>Overall, the section is vague. Evidence regarding Davidson Countt academic achievement was not provided. No information about subgroups (race/ethnic, socio-economic, special needs) was provided, nor was information regarding health related factors for LCS.</p> <p>That there is significant academic need is clear from the low at/above school level percentages, however, there is no indication of how a classical program or a wellness focus would serve these particular students better than the existing LCS schools. Cited obesity statistics are five years old.</p> <p>Appendix A. 1. does not provide sufficient evidence of need or support.</p>	Kristen Vandawalker	Educational
<p>Appendix A provided evidences, but the small sample size does not reflect the projected number of students that could attend the school. Data for wellness is dated and not specific to the area.</p>	Lisa Swinson	Educational
<p>Purposes explain how staff will be trained in both Classical teaching, as well as, healthy lifestyles.</p>	Lisa Swinson	Purposes of
<p>Are there any classical programs available in the LCS or DCS systems? How does improving teacher's physical wellness change the way they deliver classical instruction? No clear evidence that teachers will be able to participate in the creation of the learning program?</p>	Kristen Vandawalker	Purposes of
<p>Goals are not addresses in SMART terms, and overall lack rigor. Goals do not indicate what students are being measured in most cases. In essence, are these all school wide averages? this may not be appropriate given serving 7 grade levels in year 1. Goals rely on end of year measures, it does not appear that internal benchmarking and monthly growth will be assessed. MAP goals are especially vague, and seems to imply that not all students will be able to make RIT growth year over year (national norm for growth is ~6 RIT points BOY to EOY, transformative growth is generally defined as >11 RIT points). Growth measures don't appear to figure in the health goals overall, but wouldn't this be easiest to track? No goals related to student or teacher attendance/retention/attrition/satisfaction. No goals related to fundraising or other financial inputs? Unclear whether the OAR will include benchmarking/trend data, how board members will be engaged with/by the data. How do these goals relate to the DPI's performance framework for charter schools? With these goals, would the school be able to achieve high ratings in the framework?</p>	Kristen Vandawalker	Goals for th
<p>The applicant has provided wellness goals. How will wellness goals align with classical education program?</p>	Lisa Swinson	Goals for th

Reviewer	Score
Eric Sanchez	
Kathryn Mullen Upton	Pass
Carol Ann Hudgens	
Joe Maimone	
Steven Walker	
Lisa Swinson	Pass
Tammi Sutton	
Kristen Vandawalker	Fail
Sherry Reeves	
Mike McLaughlin	
Helen Nance	

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III. EDUCATION PLAN

(No more than ten total pages in this section)

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

Instructional Program:

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

Using a classical curriculum rooted in the trivium of grammar, logic, and rhetoric alongside our fitness and wellness programs, Fortis strives to engender in each student a passion for self-learning and personal health that appears in their academic and professional success. While Fortis will utilize and build the educational foundation of each student using the trivium and direct instruction, we will also utilize concepts from established successful charter models such as KIPP and Great Hearts as well as from the research occurring in the country's elite universities. Fortis will always aim to have the most successful and powerful instructional methods in our classrooms.

The trivium of grammar, logic, and rhetoric represents individual levels of learning for each child as well as a cohesive unit of intellectual expression that will be present at each grade level of Fortis.

Grammar and language acquisition will be the basis for the early grades (K-4). The grammar stage encompasses learning facts and background knowledge. Students will engage the grammar of their language as well as work to build strong vocabularies through direct teacher instruction, consistent repetition, and physical games used to add play to the cognitive process and enhance retention. The beginnings of open dialogue and discussion will be explored in these grades. Language instruction, including Latin will aim to create a pliable knowledge of the material that can be applied to all topics be it math, ELA, social sciences, or art.

Logic will be the core focus of grades 5-7. In the Logic stage, Socratic questioning, logical argument, and discursive reasoning come to the fore. Here students will continue to enhance their language skills by applying them to complex questions in their work. All subjects will be delivered through direct teacher delivery and then explored by the students, effectively "passing the torch" to the students early in the lesson. Students will be required to explain answers and show how they reached logical conclusions. Emphasis will be on deductive reasoning, applied language, and pattern recognition. Rhetoric will be the focus of the 8th grade. In the rhetoric stage, knowledge and understanding are synthesized, connections are made between domains, and persuasiveness and eloquence are developed. These grades will be the foreground for developing individual learning accountability and both spoken and written discourse.

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These individual pieces (grammar, logic, and rhetoric) of the trivium build upon one another giving all students (ELL, EC, AIG) the chance to enhance their skills over years of instruction. These stepping stones will lead to articulate, creative students.

Fortis will employ regular assessments of student performance. Examples of these assessments may include weekly quizzes, quarterly tests, or unit tests, as well as participation in all state field and required assessments of the NC Accountability Model. Testing and assessments will be rigorous in order to prepare students for increasing standards of performance. Fortis testing will focus on long form written answers rather than multiple-choice, in line with the core of the trivium. Fortis will utilize nationally normed tests such as the NWEA-MAP to bolster accountability in student performance in conjunction with the EOG/EOY tests.

Fortis Academy teachers will be referred to as instruction or academic coaches. This title is meant to reflect how learning is approached at Fortis, through trial and error, and repetition of skill guided by a leader. Coaches are a crucial part in the development of Fortis as a team and the development of each individual player. Fortis Academy believes that accountability in the environment is crucial to child development and therefore all faculty and staff will be expected to model intellectual curiosity and health and "instruct" students by their example by being articulate, intellectually-excited, healthy individuals themselves.

Curriculum and Instructional Design:

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

The entire environment of Fortis will be designed to engender learning and student growth. Faculty and staff will be held to the same standards of performance and health and wellness as the students. This high level of accountability guarantees that students will see the desired outcome of their education "modeled" for them every day. To maintain consistency, the day to day activities of students will be rigorous and outlined clearly. Students will refer to teachers as coaches and refer to each other by their grades terminology (leapers, jumpers, climbers, runners, flyers, etc.). There will be protocol for student movement between classes and throughout the school day. Accountability and consistency create a safe environment and when students feel safe they are more likely to take academic risks and explore their learning creatively.

Fortis classrooms are designed to bolster the physical environment of Fortis as well. We want students to have space to move and interact with material. Each student at Fortis will be given a pedometer and participate in Virtual World Race, an interactive online physical activity game that tracks student health goals on Google maps as they "circumnavigate" the globe. Standing desks will be used to create strong postures and active minds. Here Fortis will link its academic mission with its physical mission and develop student minds and bodies simultaneously. Classrooms will resemble bee hives with students learning and working with vigor and focus and movement all yielding excellent academic results.

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The primary place of instruction will be the Fortis classroom. Teachers will utilize direct instruction, the Socratic method and guided discussion as primary tools for teaching. Our young scholars' (K-2) classrooms will be marked by large open spaces with a few small circular tables at standing height. The open environment and raised tables will lead to more time spent on their feet, moving and interacting with the information being taught to them. Students will have access to multiple work/play stations such as a writing/reading/art station, a computer station, or a hands-on building station. Class enrollment for K-2 will be 66 students for 3 teachers and 2 teaching assistants granting roughly a 13:1 student ratio. The stronger foundation we can create for our young students, the more successful they will be in their later grades.

As students progress through Fortis, the classrooms will remain open but due to the necessity of more scholarly work, will require more desk time. Here we will use individual standing desks on casters where coaches can facilitate group discussions and student collaboration easily. We believe that the open environment will allow students to spend far less time seated than your typical student. The desks will allow for easy transitions to a round table Harkness model classroom or forward-facing direct instruction class, and will push student interaction forward, leading to not only individual student accountability but overall group accountability. The typical classroom ratio of 22:1 in grades 3-8 will lead to active group learning opportunities and lively, diverse debates.

The later grades at Fortis will utilize the Harkness method to its fullest extent. Circular table arrangement and a Socratic method of spoken and written debate and discussion will solidify each component of the trivium in our students on a daily class by class basis.

The environment is designed to be one of safe, healthy learning, where students feel prepared to take "at-bats" with the material frequently, coached through their stance, approach and path in a nuanced manner. Classrooms are intended to be lively where students and teachers pass the ball, so to speak, frequently and there is an onus on the student participating constantly. When a student feels safe, healthy, and confident they will take risks, accept small failures, and achieve great successes.

Provide a synopsis of the planned curriculum, including:

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

In explaining classical education, Terrence Moore, a Hillsdale College professor, tells people, "This is the kind of education your grandparents received." A school administering a classical curriculum gives students a

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content-driven education that includes basic grammar and writing, U.S. and world history, rigorous math and science, and classic literature. Classical education was prevalent in public schools from their origin in the 17th century until the early 20th century when it was abandoned for more progressive forms of public education. Synthesizing years of psychological and pedagogical research, UVA professor of education E.D. Hirsch demonstrated that abandoning classical content for progressive critical thinking methods deprives children of the ability to think and communicate. Hirsch notes, "One cannot build a tower with no material". This deprivation affects students from every socioeconomic group and research indicates that it may be falling hardest on poor and minority children.

Classical education has remained prevalent in high performing private schools and homeschools throughout the country, however, Fortis believes that if the most successful educational model in history is being used primarily in private and home schools, then this wonderful, proven curriculum is being effectively denied to the 89 percent of school aged children who attend public schools.

Fortis Academy plans to use this classical approach in alignment with the Common Core and NC Essential State Standards to ensure students are prepared for testing under the NC Accountability Model. According to the North Carolina Department of Public Instructions Accountability Services Division, the NC Accountability Model's mission is to promote academic achievement for all North Carolina public school students by improving student learning to subsequently increase graduation rates and close achievement gaps. Fortis Academy believes their language-focused, rigorous, and systematic classical curriculum will adhere to supporting this mission and aid students to achieve to their highest potential. National statistics from The Association of Classical and Christian Schools show that students who receive a classical education on average will score higher on the SAT and ACT preparing students for higher learning opportunities, which ultimately and importantly support Fortis' mission of preparing students for the academic and career challenges ahead.

The physical conditioning and health and wellness component of the Fortis curriculum also finds its roots in classical education, particularly as it relates to the Greek influence. Their educational system, in addition to core academic subjects, consistently emphasized the importance of "arete" or individual, physical excellence and achievement. Physical excellence and ability was just as important as intellectual excellence. Greek children from age 7-14 attended two schools: a palaestra where they learned to wrestle, and a conservatory where they learned reading, recitation, writing, arithmetic and the arts. From age 10-14 students would continue with their physical training at a gymnasium where they studied wrestling, boxing, running, the long jump, and throwing the discus and javelin. These skills had an impact on the scholars mental stamina and endurance in complex problem-solving. This combination created an ideal educational foundation for the Greeks, a society that gave us the enduring form of modern democracy and made vast contributions to the arts, literature, and world culture. Fortis believes that the healthy symbiosis of mind and body has been lost in the current system. In reviving it, we will offer students a curriculum with a long, successful history aligned with modern standards. We will provide this academic environment in tandem with a physical program that provides

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the tools for them to build a healthy, successful academic and professional career.

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

The primary instructional strategies that Fortis Academy will encompass will be directly related to the teaching methods entwined in the classical model of the Trivium. This kind of teaching requires teachers to comfortably, effectively, and skillfully use a wide range of instructional strategies to teach students how to think clearly and express themselves eloquently. Teachers will receive extensive professional development, in-house as well as through the state, to ensure successful and accurate implementation.

Teachers/coaches must be able to facilitate student instruction and student engagement in a whole-group setting as well as a small-group and one-on-one remedial or enrichment type setting. In each setting, teachers must be able to incorporate various learning modalities into each lesson consisting of presenting information and integrating visual, auditory and kinesthetic strategies to accommodate different learning styles. As well as accommodating their teaching to different learning styles, teachers will be expected to effectively differentiate instruction based on student need and be aware of the rights and needs of EC and ELL students.

In the earlier grades, the grammar stage, teachers will introduce the basic building blocks of education using a direct instruction approach. This intensive intervention is designed to increase, not only the amount of learning, but also the quality by systematically developing important background knowledge through recitation, drills, and memorization of facts and rules. Research shows that students in this stage of learning find memorization fun and Fortis teacher/coaches will be expected to capture this enjoyment with games and active learning tools.

As students progress into the logic phase, a child's mind begins to think more analytically. Therefore, teachers must be skilled at using the Socratic Method. In this method, teachers incorporate thoughtful questions to arouse student curiosity and help students think critically about complex topics through an incremental process, often modeling their own thinking. Answers to questions generate further questions, allowing for a richer, deeper, subtler understanding of the subject.

Although Fortis Academy will not serve as a high school, students will begin the rhetoric stage prior to the completion of seventh grade by applying the rules of logic learned in middle school to the foundational information learned in the early grades and be able to express conclusions in clear, forceful, elegant language. Teachers in advanced middle school courses will be able to effectively lead debates and discussions as students will be starting to write and speak with force and originality.

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

The classical curriculum model applied through the trivium of grammar, logic, and rhetoric is a time tested, proven model. Fortis' application of

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this model will be applied faithfully and rigorously to ensure success. The trivium is structured to show progress. Each section of the trivium builds upon the proceeding section while new input is being synthesized. This structure allows for progress to accurately measured, quantitatively as well as qualitatively.

As stated elsewhere in the application, Fortis will meet or exceed all state performance standards, achieve goals as defined by the NC accountability model, and measure these successes against other nationally normed tests and in-house assessments. Students will have several assessments throughout the year to ensure mastery, growth and meeting target goals. The assessments will vary from formative to summative and will be relevant, equitable, comprehensive, and modified based on student need. Fortis Academy will use quarterly benchmarks in core subjects, Dibels fluency checks, presentations, research papers, rubrics, and standardized testing. These assessments will be used to ensure that each Fortis student progresses towards the academic (and physical goals) outlined in our goals section. These clearly defined, highly attainable goals along with regular, consistent assessment culminate in our required student exit standards:

- Proficient on EOY assessments according to North Carolina's Accountability Model
- Meeting or exceeding target AMOs in coursework and class proficiency
- Proficient on benchmarks
- Meeting attendance requirements

The physical program of Fortis is designed to both enhance the grade to grade success of the student and to produce a fitter, healthier, and more confident performer at the end of a student's time at Fortis. The extended day allows for more movement and activity time for the students. Classroom enhancements such as standing desks, pedometers, and open space will allow for physical expression and encourage the student to remain engaged during class time in addition to the movement periods. Studies have linked extended physical activity to a reduction of student health risks, absenteeism, behavioral issues, and disciplinary problems. The success of the physical program will only embolden the grade to grade success of the student.

With a highly structured, developed curriculum and regular, extensive assessments being bolstered the health and wellness component of the school, Fortis scholars will grow from grade to grade and will complete the 8th grade as articulate, physically fit young students.

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

Fortis currently plans on having an 8:30-5 extended day model. This time frame allows for Fortis students to have multiple daily movements sessions and still have ample time to receive educational instruction. This daily

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schedule also relieves time constraints from two income households and working parents, allowing for a healthier schedule for Fortis families.

The calendar provides for 185 days of instruction so with an extended day, Fortis students will have more time under instruction than your average student. This extra time will allow for better retention rates and performance.

Special Programs and "At-Risk" Students

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

Fortis Academy will utilize core elements of the Response to Intervention (RTI) rubric in conjunction with its curriculum, assessment programs provided by the state, and selected in-house programs. Fortis Academy will institute an RTI system based on three tiers of intervention:

Tier 1 (High-Quality Classroom Instruction): Classrooms use differentiated instructional strategies, learning activities and curriculum materials to address the needs of all students. The Fortis Academy instructors, curriculum coaches, mentors and administrators will provide frequent opportunities for targeted support within the classroom.

Tier 2 (Targeted Interventions): For students who continue to struggle, Fortis Academy will offer targeted, data-driven programs to meet individual student needs. Fortis Academy's instructional support staff will provide push-in and pullout support in one-on-one and small group settings. Literacy intervention will be typically conducted through small group pull-out sessions, while math interventions will usually be in-class support, with inclusion being the main goal. Some students may need more assistance than can be provided during regular instructional periods, thus the instructional support and leadership teams, in consultation with the teacher and parents, will determine if tutoring is necessary.

Tier 3 (Intensive Interventions): The goal of Tier 3 is remediation of severe problems that require intensive and sustained intervention.

Under the RTI framework, any student who does not meet certain benchmarks established in the curriculum and assessment program will be identified as needing extra attention:

Typical Tier 1 Strategies:

- Small group or one-on-one instruction, guided reading, etc.
- Breaking tasks down into smaller, manageable parts
- Previewing material/Reviewing material
- Extra review/remediation (i.e. reviewing letters/sounds or phonics rules learned earlier in the day)
- Graphic organizers
- Systematic sight-word instruction

Typical Tier 2 strategies:

- Focused small group learning
- Foundations dose: a individualized short review of foundation material

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-One on one literary interventions

Fortis Academy will also implement frequent progress monitoring for all tiers as an organized method of tracking students to assess the progress and performance of student learning and achievement. A teacher can use these measurements to gauge the effectiveness of teaching and to adjust instructional techniques to meet the needs of the individual student. A student who is not responding adequately to Tier 1 instruction moves on to Tier 2 and increasingly intensive levels of intervention and instruction.

According to the National Center on Student Progress Monitoring, progress monitoring has the following benefits when it is implemented correctly: 1) students learn more quickly because they are receiving more appropriate instruction; 2) teachers make more informed instructional decisions; 3) documentation of student progress is available for accountability purposes; 4) communication improves between families and professionals about student progress; 5) teachers have higher expectations for their students; and, in many cases, 6) there is a decrease in special education referrals.

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

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

1. English Language Learners who transfer in from other schools and who are already identified as ELL students will qualify for the English as a Second Language (ESL) program at Fortis Academy and will automatically receive services. ELL students who are new to the school system will be identified through Home Language Surveys (HLS). These surveys are part of the student enrollment packet that all students will be required to return prior to the school year. Students who list a language other than English on their Home Language Survey will be required to take the WIDA Access Placement Test (W-APT). Based on the results of the assessment, the student may qualify for ESL services. The school's Limited English Proficiency (LEP) team will then meet to discuss which services the student would benefit from. The team may include the student's classroom teacher, the ESL instructor, the parent(s), administrators, and others, such as an EC teacher, who may also work with the student. The services that will be discussed at the meeting are:

- a) the amount of one-on-one time needed per week by ESL instructors
- b) the amount and level of accommodations and/or modifications for class work and testing
- c) the amount/type of assistive technology devices (such as native language dictionaries, etc.) the student will use, if any.

2. Fortis Academy will have an ESL teacher that will develop LEP (Limited English Proficiency) plans for all students identified as ELL and will vary in intensity based on the tier level achieved on the W-APT. LEP plans will be developed with the collaboration of the students, teachers, parents, and EC staff and will provide accommodations to ensure they are given equal and comparable lessons in amount, scope, sequence, and quality that is provided

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to non-ELL students. Accommodations can include, but are not limited to: read aloud, separate setting, extended time, chunked text, and one item per page.

3. All ELL students will be tested annually during the WIDA ACCESS testing window, typically February through mid-March. Students who receive Level 4.0(Expanding) or below on the ACCESS test would qualify to continue receiving ESL services. Those who test out would continue to receive ESL services only if the team deems it necessary and funding is available. Students who have become proficient in English but are struggling academically would qualify for other services, such as weekly teacher tutoring, At-Risk Tutoring Services, and the after school study group.

ESL instructor(s) will monitor the ELL student's achievement by keeping daily records of lessons taught and the students accomplishments. Evaluations will take place during regular meetings between the ESL instructor and the classroom teacher.

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

a) *Specific instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.*

b) *Plans for monitoring and evaluating the progress and success of intellectually gifted students.*

a) In accordance with a Free and Appropriate Public Education (FAPE), all students will be taught at a rigorous and challenging level to ensure student engagement, a strong sense of self, and subject mastery. Fortis instruction will be differentiated to help all students achieve growth, which includes those that are identified as Academically/Intellectually Gifted (AIG).

Fortis Academy will ensure that the process to identify AIG students is clear, equitable, consistent and comprehensive, and will comply with procedural safeguard requirements in accordance with the North Carolina AIG Program.

The screening process will include benchmark data, state assessments, EOY assessments, cumulative grades, and teacher recommendations. The process will be clearly articulated and disseminated to the school community.

In addition to North Carolina's AIG program, there will be a multitude of other enrichment programs to ensure the growth of intellectually gifted students. Gifted learners possess the ability to think with more complexity and abstraction and learn at faster rates; therefore, they require challenging, differentiated curriculum and instruction which are developmentally appropriate and will prepare them for the 21st century. These programs include designated "curriculum paths" geared to motivate students towards higher learning, various academic teams, curricular modifications for higher achievement groups to include more complex tasks, exposure to a broadened scope of information, an emphasis on multiple perspectives, and a more rapid pace of instruction.

b) Growth and proficiency for all students, including intellectually gifted and high performing students, will be monitored and evaluated to ensure that

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all programs and services are effective in meeting the academic, intellectual, social, and emotional needs of gifted learners.

Fortis Academy will develop and document a student plan that articulates the differentiated curriculum and instructional services that match the identified needs of the K-8 AIG student, such as a Differentiated Education Plan (DEP). This document is reviewed annually with parents/families to ensure effective programming, and continuum of services.

Fortis Academy will employ an AIG-licensed educator as the lead coordinator to guide, plan, develop, implement, revise, and monitor each students Differentiated Education Plan (DEP).

Fortis Academy will also ensure collaboration among AIG personnel, classroom teachers, administration, curriculum specialists, and others related to AIG students.

Exceptional Children

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

Identification and Records

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

1. In accordance with the requirements of the Individuals with Disabilities Education Act (IDEA) and in compliance with Child Find requirements (34 CFR300.125), Fortis Academy will identify, locate, and evaluate students with disabilities.

Upon enrollment at Fortis Academy, parents will be required to fill out enrollment packets, which will inquire about any services their student may have received at a previous school or any diagnosis that may affect the students learning. In addition, Fortis Academy will formally request this information upon receipt of the students prior school records.

2. Fortis Academy will comply with the federal Child Find mandate to identify and evaluate all students who either have, or are suspected of having disabilities and need special education services. Teachers, parents,

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support staff, the student, and school administrators will be an integral part of the identification process as students may exhibit behaviors or disabilities only in certain areas. Students who are struggling with the curriculum will be given additional support both within the classroom and outside of the classroom according to our tiered RTI system. Teachers will provide necessary individual support for struggling students either before or after school. Their academic progress will be monitored on an ongoing basis. If there is a need to investigate the students' progress with the curriculum further, the parents will be asked to attend a meeting with the classroom teacher. At this time, the teacher may request that the parents allow the student to be presented to the Student Intervention Team (SIT), which will consist of the student's teachers, lead teachers, department chairs, EC teachers and other support personnel. The student will then commence the SIT process with parental permission.

EVALUATION

The SIT team will conduct the initial evaluation within ninety days of receipt of a written referral from the referring teacher. The team will evaluate the student through a wide variety of assessment tools including, but not limited to, data collection, classwork, observations, eyesight and hearing assessments, and the trial of various classroom accommodations and interventions.

DETERMINATION AND ELIGIBILITY

Upon completion of the evaluation, the SIT team will reconvene to determine whether the student is qualified for a 504 plan or an Individualized Education Plan and will work with the parents on their findings and recommendations.

3. Requesting Records: Within 30 days of student enrollment, Fortis Academy will request the student's prior records, including IEPs and supporting documents and/or 504 Accommodation plans from previous schools. The student's name, date of birth, and district ID number will also be requested.

Record Confidentiality (on-site): All student education records will be kept confidential in accordance with the Family Education Rights and Privacy Act (FERPA) and IDEA. Files will be kept in a locked facility and will be authorized in accordance with NC 1505-2.5.

Record Compliance (on-site): All required student records will be prepared, retained, and disposed of in a manner consistent with federal and state statutes. Paper records will be stored in fireproof cabinets or reduced to electronic documents for storage. Records will be retained per state and federal guidelines and will be destroyed by burning or shredding in accordance with chapters 121 and 132 of the North Carolina General Statutes after records have exceeded expiration.

Exceptional Children's Education Programming

1. *Describe the educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities.*
2. *Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).*

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3. *Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents and relevant staff.*
4. *Describe the proposed plan for providing related services.*

Fortis Academy will adhere to all provisions of federal law relating to students with disabilities, including the IDEA Section 504 of the Rehabilitation Act of 1973, and Title II of the Americans with Disabilities Act of 1990. Fortis Academy will work with surrounding district and county schools as well as the state to ensure that all students with disabilities who qualify under the Individuals with Disabilities Education Act (IDEA) will have a free and appropriate public education (FAPE) available to them. Fortis Academy will ensure these students are:

- a) appropriately identified and evaluated as described in the previous section
- b) provided with an individualized educational plan (IEP) or 504 plan with appropriate and attainable goals
- c) receive an appropriate education in the least restrictive environment
- d) included in the development of and decisions regarding the IEP and 504 plan

Fortis Academy will offer an inclusion model for students to the highest extent possible as research has shown evidence that those students with exceptional needs can learn and succeed in a regular classroom setting and actually benefit from doing so. And, although Fortis Academy will seek to offer the least restrictive environment, the special education teacher will work in conjunction with the classroom teacher to ensure IEP goals are met by making necessary modifications within the classroom and pulling students out for smaller groups and/or one-on-one instruction, as needed, for additional support and assessment.

Fortis will also strive to accommodate safely all EC and disabled students within the fitness and wellness programs that are offered. Studies have shown that regular physical activity can enhance the quality of life, morale, and learning capacity of students with disabilities.

Some accommodations that may be offered to exceptional children at Fortis Academy include the following:

- * Extended Time on Assignments
- * Multiple Sessions
- * Individual Pull-Out Instruction
- * In-Classroom Collaboration with the Special Education Teacher
- * Preferential Seating
- * Small Group Instruction
- * Peer Tutoring
- * Differentiated Assignments
- * Specialized movement groups
- * One on one movement/range of motion training

2. Each student with a disability is entitled to receive a free appropriate public education (FAPE) in the least restrictive environment that will enable the student to progress in the general curriculum to the maximum extent possible. The school shall provide remediation, tutoring, contracted services, a special education department with an EC program offered to all

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students that qualify. The department will use a multitude of services to meet the needs of all students in an inclusion driven environment, unless the severity of the disability is such that education in a regular class with the use of supplementary aides and services cant be achieved satisfactorily.

Placement will be decided in accordance with the least restrictive environment (LRE) provisions with input from everyone on the IEP or 504 team along with any relevant documentation.

3. EC teachers will monitor students with disabilities to ensure they achieve their goals specified on their IEP and will update and report to parents via quarterly progress reports. EC teachers will collaborate with classroom teachers to make certain the student is performing in the classroom and in other academic settings. IEPs will be reviewed by the EC department, IEP team, teachers and parents annually and re-evaluated every 3 years to determine if the student still qualifies as a student with disabilities in accordance with IDEA.

4. As needed, the school will work collaboratively with the district to identify the best possible providers of related services, such as speech-language pathology, audiology services, interpreting services, psychological services, and physical and occupational therapy.

Student Performance Standards

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

Fortis performance standards will be challenging, comprehensive, and attainable to keep students engaged and achieving. The expectation is that all students meet or exceed proficiency as defined by the school and assessed using quarterly benchmarks. Based on the current district performance and proficiency data, Fortis Academy strives to achieve these two main goals:

Percentage of Fortis scholars achieving a rank of "solid command" (Level 4) or "superior command" (Level 5) on the NC End of Grade Test and the percentage of eighth grade scholars who will meet or exceed high school readiness indicators:

Year 1: >45%, N/A
Year 2: >55%, N/A
Year 3: >65%, >60%
Year 4: >75%, >70%
Year 5: >85%, >75%

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Percentage of Fortis Scholars achieving NWEA-MAP Mathematics and Reading Scores above the national, mean RiT scores and the percentage of Fortis Scholars achieving growth over prior year NWEA-MAP Mathematics and Reading RiT scores

Year 1: N/A - Baseline Year

Year 2: >50%, >70%

Year 3: >60%, >80%

Year 4: >65%, >90%

Year 5: >75%, >90%

Students will have several assessments throughout the year to ensure mastery, growth and meeting target goals. The assessments will vary from formative to summative and will be relevant, equitable, comprehensive, and modified based on student need. Fortis Academy will use quarterly benchmarks in core subjects, Dibels fluency checks, presentations, research papers, rubrics, and standardized testing.

Immediately following a formal assessment, teachers and coaches will conduct in-depth data meetings to review individual growth and performance as well as students areas of collective weakness and strength. Teachers can focus on possible causes of a given data result and determine what aspects of instruction need to change or be adjusted so that students ultimately demonstrate their mastery on future assessments. At data meetings, teachers generate strategies with attached deadlines to target specific assessment items. This deliberate, ongoing curricular review will ensure that all students are supported by their curriculum.

Fortis Academy will require students to take the required state assessments, including but not limited to, EOGs, EOCs, NC Final Exams, NC Read to Achieve, any field assessments, and any additional testing necessary to follow the North Carolina Accountability Model and ensure Future-Ready students.

Fortis Academy will have explicit promotion guidelines that will be clearly communicated to parents through the website, handbook, and parent meetings. Promotion guidelines will be a combination of factors including classroom proficiency and mastery, state and school level assessment results, attendance, and teacher recommendations.

Decisions regarding retention will be made by a team of teachers, parents, administration and other appropriate participants if needed. It will never be a surprise to parents if their child is a possible retention, as the student will have been invited to remediation and tutoring sessions and parents will have signed off on progress and report cards as well as reviewed assessment results. Promotion decisions for EC students will include IEP goals being met, and all interventions and accommodations will be applied. Students will exit our school and be promoted to high school in accordance with the North Carolina Accountability Standards.

Fortis' exit standards will require that students are:

Proficient on EOY assessments according to North Carolina's Accountability Model

Meeting or exceeding target AMOs in coursework and class proficiency

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Proficient on benchmarks

Meeting attendance requirements

Students who are at risk of not meeting the objectives to successfully exit 8th grade will be identified early in previous grades, and appropriate interventions, accommodations, and individualized plans will be incorporated into their learning plan. Students with IEPs will need to meet the goals specified on that plan and the requirements of NC 1503-4 and NC 1503-5.1.

Student Conduct:

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

Provide a draft copy of the student handbook specific to the proposed charter school within the appendices (Appendix D).

Be sure to include:

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

1. Fortis Academy believes that effective school discipline is critical to promoting successful learning and well-being. Effective practices ensure the safety and dignity of all students and staff, preserve the integrity of the learning environment, and address the causes of a students misbehavior in order to improve positive behavioral skills and long-term outcomes. Specifically, effective school discipline:

- is viewed within the context of learning and seeks to teach and reinforce positive behaviors to replace negative behaviors
- is clear, consistent, and equitably applied to all students
- employs culturally competent practices
- safeguards the well-being of all students and staff
- keeps students in school and out of the juvenile justice system
- incorporates family involvement

Fortis Academy will dedicate the opening weeks of school to explicitly model and reinforce the desired behaviors. Teachers will use positive narration in order to build a positive school culture and encourage appropriate behavior. Student behavior in K-5 is tracked via a color-coded visual displayed at the front of the classroom that visualizes for students which "color", or behavior, the student is currently exhibiting. In grades 6-8, a merit/demerit system is used to explicitly reinforce positive and negative behaviors.

2. While Fortis Academy will use suspension and expulsion as sparingly as possible, there are some situations which affect the safety of students or

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the effectiveness of the learning environment that warrant such measures. The following behaviors may result in a student being suspended or expelled as allowed by North Carolina Law:

- Possess, use, provide, or sell students a firearm, weapon, or destructive device
- Unlawfully possess, use, sell students, provide, or be under the influence of any controlled substance or intoxicant, including alcohol, drugs and tobacco, or a de facto representation of that substance.
- Cause or attempt to cause physical assault and/or bullying/harassment which includes fighting, threatening behavior, assaulting students or adults
- Commit theft or extortion and/or knowingly accept stolen materials
- Cause or attempt to cause damage to school or other private property on school grounds
- Unlawfully arrange or negotiate to sell students any drug paraphernalia
- Disrupt school activities by causing or participating in riots or chaos
- Trespassing
- Knowingly participate in gang activity
- Pornography and/or sexual/obscene behavior
- Bomb threat or false alarm

3. If a student served under the Exceptional Children's program participates in one of the actions listed above, in accordance to federal law and regulations (G.S. 115C-391), within 10 days of the incident a manifestation determination will be conducted to ascertain whether or not the violation is linked to the student's disability and the consequence will be reviewed as required by IDEA. There is the "10-day rule" which must be taken into consideration if a student is being removed or suspended. In actions involving suspension or expulsion of a special needs child for more than ten days in a school year, we will ensure that the student has available all due process rights (G.S. 115C-109.6). If a decision is made to change a student's placement, parents will be apprised of any decision and provided the Procedural Safeguard Notice.

4. Students who have been suspended may appeal the suspension beyond the Principal to the Fortis Academy's Board of Directors which will determine the final decision, unless the suspension warrants the involvement of the judiciary system. This appeal must be made within five school days of the suspension notice. The appeal shall be written and clearly focused on the issues raised regarding the suspension. The Fortis Academy Board shall make a reasonable effort to hear the appeal within seven days of the request. At minimum two Board members shall hear the appeal, and they will record the decision.

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Section III: Education Plan Concerns and Additional Questions		
What are the concepts from KIPP and Great Hearts? Why KIPP? Are the targeted students similar to the population at Great Hearts school? What is the research from universities and which ones?	Kristen Vandawalker	Instructiona
The underpinnings of the curriculum are clear; however, the narrative does not indicate whether the curriculum is teacher-created or whether an existing program (e.g., Core Knowledge) will be used. Question for interview: what materials comprise the curricular materials? While there is a reference to data evidencing the successes of the classical approach, from the Association of Classical and Christian Schools, data is not included that supports this assertion.	Kathryn Mullen Upton	Instructiona
The applicant has provided information from the classical curriculum program. How will this be specifically implemented in the school? Standing classroom for all learners.. Is there any research to support this classroom environment?	Lisa Swinson	Instructiona
How is a classroom resembling a "beehive" a good thing? Will students stand or move all day? is this supported by research? how will this program work for non kinesthetic learners? Will ALL students, especially those with low-incidence special needs, be well-served by this model? how will this impact discipline? The actual student-teacher ration is 1:22. Are the aides trained paras? student teachers? How do classic instruction methodologies fit with the frenetic enviroment described? Is this one large classroom with five adults and 66 kids? Will reconfiguring desks mid-class distract from time on learning? Classical education isn't really a "curriculum," no information on specific curricular materials is provided. How will students who are not athletically/physically inclined fare? Lack of specificity around instructional methodology, and no connection to how the overall program or instructional methods will connect with students and improve their learning/academic outcomes. Only five days to set up physical space? Only four days of staff development? How will the staff be ready to present classical curriculum/teach in unique space with only five days of PD? How will families react to such a short winter break? Scope and Sequence in Appendix B is wholly inadequate. Not in the format requested, vague, lacks clear outcomes.	Kristen Vandawalker	Curriculum a
The curriculum framework provides insight on the academic side of the school's mission but evidence of how physical activity will be linked to it is not evident. Information provided is not specific.	Lisa Swinson	Curriculum a
Need clarification on the curriculum question, above.	Kathryn Mullen Upton	Curriculum a
This section regurgitates RTI norms but does not connect them to the curriculum/instructional model/unique learning environment. No information on who will provide the interventions. Are all ESL instructors dedicated to serving LEP/ELL students? What are "EC staff"? How will one ESL teacher be able to serve students in seven grade levels? What would be the anticipated % of ELLs? What is the anticipated AIG population? what does differentiation look like?	Kristen Vandawalker	Special Prog
This section seems vague. There is no specific information provided.	Lisa Swinson	Special Prog
No Tier 3 strategies were included. Question for interview: what are some examples of intensive and sustained interventions in Tier 3?	Kathryn Mullen Upton	Special Prog
When/how will before or after school support be provided given the 8:30-5pm school day? Will techers be compensated for extra hours? What if a parent is unresponsive or declines the SIT process.	Kristen Vandawalker	Exceptional
Although the information follows state and federal requirements, there does not seem	Lisa Swinson	Exceptional

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to be a understanding of how this will be implemented in the school.		
How will the school address referrals made by the parent? How will the school document the review of the special education record by school staff? What will the school do if there are incomplete special education records? Please describe the process in which all teachers of students with disabilities will be informed of the requirements of the student's IEP.	Carol Ann Hudgens	Exceptional
How will the school provide EC services for students that require a separate setting or have intensive needs? What are the plans for providing adapted PE and special transportation? In-Class collaboration with the SPED teacher is listed as an accommodation, please describe what those activities include. Will a Physical Therapist be needed for students with disabilities? Please provide more detail regarding the collaboration with the school district regarding related service providers and how those services will be provided. Please describe the process that will be utilized to develop, review and revise the IEP. Describe the adaptations and modifications that will be provided for students with physical impairments in order to access the physical components of the fitness and wellness program.	Carol Ann Hudgens	Exceptional
Vague, although it does address in a limited way the physical education component of the program.	Kristen Vandawalker	Exceptional
Promotion standards were included in the student handbook.	Kathryn Mullen Upton	Student Perf
There are no student performance goals for wellness.	Lisa Swinson	Student Perf
How are teachers and coaches different? How often do "data meetings" occur? What types of data are reviewed? Performance standards are not differentiated from annual goals. Are additional assessments beyond state mandates used? If so, what are they? No description of data-driven program elements, how data will drive improvements to curriculum. SMART responses are not provided. Unclear what types of "classical" evaluations will be used. Section as a whole is vague. No clear promotion policies grade-to-grade are included.	Kristen Vandawalker	Student Perf
How will the transition from color coding (is this the R/Y/G stoplight?) to merit-demerit system be handled? The process for expulsion is unclear, as is the appeal and hearing process. Does the appeal process happen automatically, or is the principal (or whatever the HOS is called) able to be the final decider? The language in the handbook is inconsistent. COuld this be indicative of plagiarism? School day begins at 7:45 according to handbook, not 8:30 as stated earlier in the narrative. Why 18 absences with 8 unexcused? this seems arbitrary. Why is 25 days the maximum for waivers? Language regarding absence due to illness is contradictory. What is a "temporary cause acceptable to the principal?" This seems to give the principal a lot of leeway to push students out? Who has final determination on course credit/promotion? Page 6 indicates the board, but the rest of the policy implies the principal? Is it typical to try to identify sex offenders before allowing people into the school? what are the core values of the school? 'Excellence' is mentioned on p. 11 of the handbook, no prior mention? The division of offenses makes little sense (cheating and porn and firearms all in the same tier?	Kristen Vandawalker	Student Cond
The student discipline policy is included in the handbook (Appendix D); however, it is not clear which violations trigger which consequences. Additionally, the handbook states that the school will make a reasonable effort to notify the parents of suspended students before the student is sent home (p. 16). This is not an appropriate approach for elementary students (especially the younger ones), who should be in the care of a parent/guardian or other authorized adult instead of left to their own devices. There are no details on procedural aspects of expulsion, aside from a statement that the school will follow state law. Question for interview: please describe the expulsion process.	Kathryn Mullen Upton	Student Cond

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<p>In response #3, the description does not include references to the NC Policies Governing Students with Disabilities [NC 1504-2]. While some procedures are listed for disciplining students with disabilities, there are missing components (providing services upon the 11th day of suspension, functional behavior assessments, behavior intervention plans, etc.). If students are suspended more than 10 school days, the school has a requirement to continue to provide services. Change in placement requires prior written notice. The involvement of the IEP team is not articulated in the response.</p>	<p>Carol Ann Hudgens</p>	<p>Student Cond</p>
<p>Handbook states "any eligible student who agrees to be bound by the school pledge and adhere to the school's policies will be accepted". Students can not be bound to a pledge to be enrolled. Students can not be withdrawn from the school if they do not return an Letter of Intent.</p>	<p>Lisa Swinson</p>	<p>Student Cond</p>

Reviewer	Score
Carol Ann Hudgens	Fail
Kathryn Mullen Upton	Pass
Lisa Swinson	Fail
Helen Nance	
Kristen Vandawalker	Fail
Joe Maimone	
Eric Sanchez	
Mike McLaughlin	
Tammi Sutton	
Sherry Reeves	
Steven Walker	

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IV. GOVERNANCE and CAPACITY

(No more than ten total pages in this section)

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

Governance:

Private Nonprofit Corporation:

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

Name of Private Nonprofit: Fortis Academy, Inc.

Mailing Address: 181 6th St. Northeast Apt. 413

City/State/Zip: Winston Salem NC 27101

Street Address: 181 6th St. Northeast Apt. 413

Phone: 828-289-1769

Fax: 828-575-5360

Name of registered agent and address: Dylan Parkes
181 6th St. Northeast Apt. 413
Winston-Salem, NC 27101

FEDERAL TAX ID: 47-1925033

Tax-Exempt Status 501 (c)(3)

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

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

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

Governance and Organizational Structure of Private Non-Profit Organization:

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

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

Board Member Name	Board Title	County/State of Residence	Current Occupation	Past or Present Professional Licenses(s) Held	Has any disciplinary action been taken against any of these
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					professional licenses?
Steven Hargrave	Board Member	DAVIDSON	Retired Air Force Staff Sergeant		
Kimberly Nix	Board Member	DAVIDSON	IT Program Manager		
Karen Burns	Board Member	FORSYTH	Operations Director		
Dylan Parkes	Board Member	FORSYTH	Self-Employed		
Lyn Tillett	Board Member	MECKLENBURG	Teacher		

Please provide the following in this location of the APPLICATION:

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

In accordance with NCGS 115C-238.29E(d) the primary function of the Board of Directors of Fortis Academy will be to "...decide matters related to the operation of the school, including budgeting, curriculum and operating procedures." The Board of Directors has been established in conventional fashion with non-compensated officers and directors and shall operate in accordance with ratified bylaws. The board will retain ultimate and final authority and responsibility for decision-making with regard to policy, procedure, finance, curriculum and other operating, instructional and non-instructional matters. That said, the Board of Directors will observe the boundary between governance and management, delegating management tasks and charges to the Principal. The Principal will be hired by the board after a careful review of qualifications, experience and integrity are duly considered. The Principal will be subject to an employment agreement specifying terms of employment, including provisions specifying the chain of command. The Principal will be evaluated annually by the board or committee thereof via a process that will include official and unofficial feedback surveys from faculty and parents as well as a quantitative and qualitative analysis and review of academic, financial and operational performance. The Board may also utilize established, market-based modules and tools such as the Kellogg Leadership Assessment Tool, Management Research Group Leadership Effective Rubric, and applicable assessments applied to faculty (guaranteeing peer and oversight competency) to evaluate its Principal.

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

Since membership on the governing Board of Fortis will not be a passive position, the Board is and will be populated with directors who are committed to active participation in the governance of a charter school. The Board will always strive to have directors who possess personal and professional backgrounds in areas such as education, law, accounting, child

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care, medicine, parenting, counseling and other skills that are relevant to serving on a charter school board. Board members should be engaged in community or public service and committed to the success of public education. Constituencies represented on the board include taxpayers, parents, merchants, educators and community leaders. The board will, pursuant to its bylaws, have a minimum membership of three and a maximum membership of eleven.

The Board will be charged with the organizational, pedagogical, oversight, risk management, long range planning and other duties required to open and operate a functional, successful public charter school. The Board of Directors is legally accountable for all aspects of the operation of Fortis Academy and will be required to answer to stakeholders for the academic, financial, and operational performance of Fortis. The responsibilities of the Board as described above shall include but not be limited to: facilitating the development of fiscal, operating and personnel policies and procedures; hiring, supervising and evaluating the Principal; negotiating contracts with vendors, compliance with the terms and conditions of the Charter contract; compliance with applicable state and federal laws; development of the annual budget and regular monitoring of budgetary performance and facilitation and review of the annual, independent financial audit. The Board of Directors will not engage in the day-to-day management of Fortis Academy, but will empower and provide direction to the Principal who will oversee the management of the school.

The diverse composition of the board will contribute to the operational and educational success of the school. Each board member will bring his/her unique knowledge, talents, experiences and networks to the table to create a synergistic process from which a framework of integrated policy, procedure, strategic planning, successful implementation and periodic evaluation will emerge. This framework will serve as the drivetrain for the mission, vision and operational and educational goals of Fortis.

The Fortis Board of Directors will facilitate the annual evaluation of the Principal. The evaluation process will utilize tools designed to produce a measurable, specific assessment of performance, in both quantitative and qualitative terms, in key areas such as academic performance, financial performance, operational performance, staff satisfaction, parent satisfaction, etc.

The Board will conduct an annual self-evaluation as well. This evaluation process will employ a systematic means for gathering input from the various stakeholders (staff, faculty, parents, etc.) with a vested interest in the success of Fortis and its leadership combined with specific data driven components from the annual financial audit, student testing performance and enrollment/retention statistics. The results of the evaluation will provide a basis for assessment, ongoing improvement, goal-setting, planning and realignment.

The Board will invite and welcome input from key stakeholders and will set aside time during each board meeting for public comment during which stakeholders can speak directly to the Board as to the school's perceived successes and shortcomings, the effects of proposed or ratified policies and procedures and general concerns. In addition, the Board will actively

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encourage stakeholders to become part of the school leadership process through service on subcommittees of the Board.

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

The founding Board of Fortis Academy is a diverse cross-section of educators, professionals and community leaders who have subscribed to the mission of Fortis and are committed to opening and operating a successful charter school that will have a positive impact on the education landscape in the community. Board members have been recruited based on their interest and enthusiasm for working collaboratively to open a high quality school of choice in Lexington and based on the talents and experience that they bring to the table. In the event that a Board member's seat becomes vacant, the remainder of the board will endeavor to seek applications from interested parties and select an individual to fill the vacancy who can contribute constructively to the opening and ongoing operation of Fortis Academy.

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

The board will meet at least 9 times per year in addition to an annual, May meeting.

- 5. What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation (Board Policies Draft: Appendix J).*

New board members will take part in a 1/2 day orientation within 120 days of joining the Board. The orientation will address board policy and procedure, board member responsibilities and expectations and the fundamentals of governance. Annually, the entire Board of Directors will undergo a full day of board training. Topics covered will include governance vs. management, keys to effective governance, the qualitative aspects of charter school leadership, conducting effective meetings, managing legal matters, managing parent matters, conflict resolution and an SBE Policy review. The first board training will take place within 90-days of charter approval by the SBE.

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

The Board realizes the gravity of its members being charged as stewards of the public trust and that each member's ethical conduct is a reflection on the entire board. The members of the board of directors recognize that they hold authority not as individuals but as members of the board. In order to make a clear public statement of its philosophy of service to the students of the district, the board has adopted a Code of Ethics (See Appendix J - Board Policy Manual, Policy Code 801402 "Code of Ethics", Pages 122-123) that addresses the board's responsibilities as it relates to ethical standards such as non-discrimination, confidentiality, collaboration, honesty and objectivity.

The Fortis Academy Board of Directors is committed to preserving the public trust by taking proactive measures to ensure the highest ethical standards are observed and practiced by every board member particularly as it relates

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to conflicts of interest. To that end, the Board has adopted a comprehensive conflict of interest policy with the purpose of avoiding conflicts of interest and potential conflicts of interest between a board member's private interests and the board member's public duties (See Appendix J - Board Policy Manual, Policy Code 801404 "Conflict of Interest", Pages 123-125). The policy requires that current and prospective covered persons examine, evaluate, and disclose those personal and financial interests that could be or cause a conflict of interest or potential conflict of interest between the board member's private interests and their public duties. Every board member has an affirmative duty to provide any and all information that a reasonable person would conclude is necessary to fully disclose any existing conflict of interest or potential conflict of interest.

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

The Fortis Academy Board of Directors has already adopted a comprehensive set of policies (See Appendix J) as a requirement of this application, however, upon being granted preliminary approval, those policies will be subject to a more comprehensive review and adoption process.

Adoption of school policy by a quorum of the board at a legally called meeting will be the culmination of a process that seeks (via a subcommittee of the board) input from interested/affected constituent groups within the school community, research of available alternatives, careful study of the impact and costs of a potential policy and thoughtful deliberation of preliminary solutions. Upon completion of this process, the subcommittee will make a policy recommendation to the Board of Directors which will give the matter consideration and either ratify the recommendation, take no action or refer the matter back to the subcommittee for additional input, research, study and deliberation.

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

The Fortis Board of Directors is ultimately responsible and accountable for the actions, performance and success of the charter school. It will, therefore, not utilize advisory boards, councils or associations within its organizational chart. The organizational chart for Fortis reflects a clear decision-making authority at every level which is accountable to the level above. That notwithstanding, the Fortis board will welcome input and feedback from constituent groups (parents, faculty, staff, community members, regulators, recognized and credentialed experts) as part of the process of developing and evaluating policies and identifying areas of improvement.

It should be noted that the organizational chart does specify a PTO, which will be accountable to the Principal of Fortis Academy. The PTO is not an advisory body or council. Rather the PTO will serve strictly as a support organization for student events and activities.

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

The Board will establish a standing Grievance Committee. The purpose of the Grievance Committee is to evaluate and determine the merits of a properly filed grievance by a parent or member of the faculty or staff and to possibly make a recommendation to the Board for consideration. Filing a valid grievance requires that the aggrieved party address the issue with the following individuals in the proper sequence as follows:

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STAFF:

First Step - Seek resolution of the matter with whom the staff member has the disagreement

Second Step - Seek resolution via the employee's immediate supervisor

Third Step - Seek resolution via the Principal

Assuming no resolution, the staff member may file a grievance with the Board.

PARENTS:

First Step - Seek resolution with the child's Instructional Coach

Second Step - Seek resolution with the Instructional Coach's department chair or supervisor (if applicable)

Third Step - Seek resolution with the Principal

Assuming no resolution, the parent may file a grievance with the Board.

Grievance forms are to be provided without cost by the Principal within 48 hours of being requested by the aggrieved. The aggrieved is not required to provide a reason to the Principal as a condition of receiving the grievance forms. The forms must be completed and submitted to the Grievance Committee Chairperson per the address and/or email prominently displayed on the grievance forms. Multiple grievances may not be combined on one form, however, multiple grievances may be submitted concurrently on separate forms. Grievances must be individually submitted and individually reviewed by the Grievance Committee.

The aggrieved party has a right to an expeditious, objective and thorough review of the grievance. Upon receipt of the grievance, the Chairperson of the Grievance Committee shall convene a quorum of the Grievance Committee within a reasonable time, not to exceed twenty (20) calendar days from the date of receipt.

The Grievance Committee will consider all available evidence but is neither required to conduct hearings nor to hear verbal testimony. Upon thoughtful review, the Committee may elect to dismiss the grievance (i.e. take no action), request additional information or recommend action to the Board of Directors.

If the Committee chooses to dismiss the grievance, the Chairperson of the Committee will issue a letter to the aggrieved notifying them that the committee has chosen to dismiss the grievance and indicating the reason for dismissal. The letter must explicitly state that the aggrieved may appeal the matter directly to the Board of Directors by submitting a letter to the Secretary of the Board stating "I appeal the decision of the Grievance Committee" and providing the basis of the appeal. The findings of the Board of Directors upon appeal by the aggrieved shall be final.

If the Grievance Committee chooses to recommend action to the Board of Directors, the Chairperson will issue a letter to the aggrieved stating that the grievance has been referred to the Board of Directors for further action. In addition, the Committee Chairperson will issue a letter to the Board detailing the specific action that the Committee is recommending to the Board of Directors. The Board may accept the recommendation of the Grievance Committee, take action in a manner that it deems fit regardless of the recommendation of the Grievance Committee or take no action. The

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Board's decision upon recommendation of an action by the Grievance Committee shall be final.

All records submitted or reviewed during the grievance process are to be preserved in accordance with the school's retention schedule. Grievance records containing protected information under the law are not public documents and are not to be disclosed, published or released in full or in part. Grievance Committee members may not make any comment regarding the grievance deliberations or final outcome.

Governance and Organizational Structure of Private Non-Profit Organization (continued)

Include in the Appendices:

1. A well-defined organizational chart showing the relationship of the Board of Directors to the parents and staff of the proposed charter school. This chart should also include lines of authority to and from any outside entity that will play a role in managing or supporting the charter school (such as educational service providers, advisory bodies or parent/teacher councils). (Appendix F)
2. A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form (Appendix G).
3. The proposed by-laws, which must include a Conflict of Interest Policy for board members and a stated commitment to the NC Open Meetings Law (Appendix H).
4. A copy of the articles of incorporation from the NC Department of the Secretary of State. (Appendix I)
5. Copy of any board policies if adopted already (Appendix J).
6. Copies of meeting minutes (if available), relevant to the development of the charter school plan, during the application process (Appendix K).

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

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

X Not Applicable

Private School Conversions: complete ONLY if the proposed charter is a private school conversion.

Otherwise, mark "Not Applicable" and follow the direction #3 in the Application Specifications.

X Not Applicable

Applicable" and follow the direction #3 in the Application Specifications. Understand that the replication means that a new charter school will be governed separately from the charter school the application is modeled after.

X Not Applicable

Projected Staff:

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

The positions anticipated by Fortis and the number hired in Years 1/2/3/4/5 are as follows:

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Instructional:

Core Content Faculty 21/24/27/28/29
Music/Arts Faculty 2/2/3/4/4
Physical Education Faculty 2/3/3/4/4
Fitness and Wellness Director 1/1/1/1/1
Faculty Assistants 4/5/5/6/6
EC Director 1/1/1/1/1
EC Faculty 1/2/3/4/4
EC Teacher Assistants 1/1/2/2/3

Administrative:

Principal 1/1/1/1/1
Assistant Principal 1/1/1/1/1
Business Manager 1/1/1/1/1
Admin/PowerSchool Clerk 1/2/2/2/3
Guidance Counselor 0/0/0/1/1
Full-Time School Nurse 0/0/0/0/1
Part-Time School Nurse 0/0/1/1/0
Full-Time Food Service Staff 1/1/2/2/2
Part-Time Food Service Staff 0/1/0/0/0
Full-Time Custodians 1/1/2/2/2
Part-Time Custodians 0/1/0/0/0

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

Fortis Academy believes that offering competitive salaries and benefits are an integral part of its recruitment plan, however, we also intend to actively promote the unique, collaborative, health-conscious work environment. Our goal is to build a culture among the staff that is focused intently not only on student improvement, but on improvement of your colleagues and, in turn, yourself. We will trumpet Fortis' commitment to helping every teacher achieve their professional and personal goals. We envision a faculty with a team-oriented mindset that lives the ethos of Fortis Academy by encouraging healthy lifestyle changes, inspiring intellectual curiosity and leading by example.

Consistent with Fortis' philosophy of balance, we will seek to recruit faculty from all walks of life who have a demonstrated history of accomplishment in their college or teaching careers. We plan to reach out to the colleges and universities in North Carolina as well as the Charlotte office of Teach for America to provide teaching opportunities for newly certified teachers. New teachers bring a unique energy and outlook to the classroom and the teacher workroom. In the same respect, Fortis will also recruit experienced, highly regarded, mid and late career teachers who are seeking new opportunities in their career. Experienced educators bring a mature, level-headed dynamic to the school and provide the groundwork to build a teacher mentoring program through which classroom instruction is in a state of constant improvement as seasoned school teachers share their knowledge and mentor to the more novice teachers and the novice teachers renew in experienced teachers the inspiration and excitement behind their call to be educators.

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We believe that by targeting the best teachers and by creating a positive culture in an environment of shared knowledge and leadership, Fortis will effectively minimize turnover and become the workplace of choice for high-quality teachers.

- 2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board. Provide as Appendix O, a draft of the employment policies to be implemented by the proposed charter school.*

Although the board retains final authority over all faculty and staff at Fortis, it must recognize the line that exists between management and governance. Therefore, the Fortis Academy Board will delegate the duties of hiring, evaluation, discipline, promotion, assignment and termination of faculty and staff to the Principal in accordance with adopted employment policies. The Principal will remain accountable to the board for all decisions made with regard to personnel.

In an effort to keep the Board of Directors engaged and to decrease the perceived "distance" between board members and the faculty and staff, employees will elect a staff representative annually to serve as a liaison to the board of directors. This liaison will attend board meetings, provide faculty and staff insights on issues of importance and provide feedback to the board with regard to policy and procedure. In addition, teachers and staff will be encouraged to serve on subcommittees of the board.

In addition, the Board of Directors will communicate with and receive input from the faculty and staff through instruments such as faculty surveys, the O.A.R. and a monthly, 10-minute carve-out at each board meeting for a faculty member to highlight to the board the achievements of the students in their classrooms or the co-workers at their side.

Although it is the board's goal to be accessible and responsive to the needs of the faculty and staff, it should be noted that the chain-of-command will be held in high regard. The board will at no time serve as a work-around for a faculty member to draw attention to a matter or issue that should be addressed with the Principal.

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

The hiring process will generally include the following steps:

1-Initial applications for employment will be screened by designated personnel for appropriate experience, certification, education, credentials and other stated prerequisites for the position. A qualitative review of applications will then be conducted by the personnel committee or other designated team and qualified candidates will be granted a first-round interview.

2-First-round interviews will be conducted with the Principal and any other relevant designees of the board. A candidate chosen from the first-round interviews to proceed to a second interview

3-Assuming a successful second interview and the return of a favorable background check, satisfactory references, verified credentials and licensure and clean drug screen, an offer of employment will be extended to the candidate.

An applicant's or employee's criminal history may indicate that the

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applicant or employee is not fit to work in the Fortis Academy. Therefore, in accordance with N.C.G.S. 115C- 332, a criminal records check of an individual's county, state or federal criminal history will be conducted on all applicants for employment who accept an offer of employment or re-employment, including full-time, part-time, substitute and temporary employees.

Fortis will establish a comprehensive protocol for evaluating employees. In instances where staff or faculty members are identified as underperforming, the staff/faculty member will be counseled by the Principal and may be required to participate in a corrective action plan that establishes clear expectations, timelines and benchmarks for continued employment. Progress will be monitored periodically through the expiration date of the plan. Upon re-evaluation, the employee will be retained or discharged based upon progress. Employees who commit acts of violence, endangerment or other behaviors that compromise student and workplace safety may be discharged without notice.

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

SALARIES

Faculty Salary Range (including EC): \$34,500 - \$39,000 with adjustments up or down for experience and credentials

Faculty Assistant Salary Range: \$22,000 - \$24,000 with adjustments up or down for experience

Principal salary: \$54,500 with adjustments for experience

Assistant Principal salary: \$45,000

Business Manager Salary: \$35,000

Administrative Personnel Salary: \$25,000

Food Service and Custodial Salary: \$26,000

Guidance Salary (Yrs 4 & 5) \$40,000

Nurse Salary (Yrs 3, 4 & 5) \$30,000

BENEFITS:

Employees will receive major medical insurance through the state health program. Fortis intends to pay a portion of the premium cost (for the sake of conservatism, the budget assumes 100% of employee premium costs, but economic conditions and uncertain market dynamics -- particularly related to the implementation of the Affordable Care Act -- may not make it economically feasible for the school to fund the entire premium).

Fortis will also make supplemental insurance available through a Section 125 cafeteria plan. Such coverage includes cancer, dental, short/long term disability, life, vision and other insurance. Initially, the Section 125 plan premiums would be the employee's responsibility.

Fortis will offer participation in a tax-deferred, defined contribution

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retirement plan. Fortis will provide a dollar-for-dollar match (or portion thereof) for employee contributions up to a maximum amount as defined in the plan documents.

Fortis will also provide each full-time employee with a fixed number of personal leave days that can be used for illness, vacation, bereavement and other personal time. Fortis will be subject to the Family Medical Leave Act (29 USC 2601 et seq.; 29 CFR Part 825)

Every employee of Fortis Academy will have access to the Fortis's fitness facility as a means of improving and maintaining their personal health and, if desired, will have access to an on-staff, personal trainer.

6. Provide the procedures for employee grievance and/or termination.

The Board will establish a standing Grievance Committee. The purpose of the Grievance Committee is to evaluate and determine the merits of a properly filed grievance by a member of the faculty or staff or by a parent and to possibly make a recommendation to the Board for consideration. Grievance processes for employees are outlined in detail per Board Policy Code 701445 (Board Policy Manual, Appendix J, Page 117).

Prior to beginning the formal steps of the grievance process, employees should attempt to resolve the grievance directly with the person with whom the matter pertains. Assuming that is unsuccessful, grievances are handled through a 3-step process.

First Step The grievance is submitted in writing to the principal for resolution. If that is unsuccessful...

Second Step The grievance is submitted to the Boards Grievance Committee. If that is unsuccessful...

Third Step The grievance may be submitted to the Board of Directors.

In accordance with federal law, Fortis forbids retaliation when it comes to any aspect of employment, including grievances and complaints.

Termination or non-renewal may result from conduct or performance shortcomings outlined in the Personnel Policy. Fortis recognizes that a staff or faculty member who leaves employment, whether voluntarily or involuntarily, represents a forfeited investment of time and money. To that end, and whenever possible, Fortis will make every effort to remediate employees exhibiting conduct or performance shortcomings through corrective action plans, improved communication and periodic evaluation. This shall in no way, however, be construed as Fortis forfeiting its rights to terminate employment immediately under the doctrine of employment-at-will, particularly in matters involving the health and safety of students, faculty and staff.

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

The school is not planning to hire employees with dual responsibility roles.

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

Fortis Academy is committed to hiring highly qualified staff to meet the needs of its Exceptional Children (EC), English Language Learner (ELL), and Academically and Intellectually Gifted (AIG) student populations.

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All special education teachers will have a Bachelors degree in education, curriculum and instruction, or related field from an accredited college or university and will hold a teachers certification reflecting mastery of the principles of exceptional child education, special education curriculum and instructional theory and use of data to drive student progress and program improvement. Hiring preference will be given to candidates holding certification in more than one area (EC, ELL, AIG). The EC Director will, in addition to the forgoing requirements, be required to hold a Master's Degree and have at least 5 years of successful experience managing Special Education.

The faculty will include at least one certified teacher with ESOL/ELL certification or endorsement.

9. *Provide a narrative detailing the roles and responsibilities, qualifications and appropriate licenses that each position must have to be hired by the non-profit organization and effectively perform the job function(s).*

Faculty and staff will be required to hold the appropriate licenses, certifications, endorsements and experience necessary to faithfully and satisfactorily fulfill the roles and responsibilities for which they were hired and as required by their job description. Faculty and staff will conduct their work in a manner consistent with the mission of the School, the needs of every student and the expectations of all stakeholders.

FACULTY ("INSTRUCTIONAL COACHES"):

Core content faculty at Fortis Academy will hold a valid North Carolina Standard Professional ("SP") 1 Professional Educators License and the School will develop, maintain, and, as necessary, have approved by the NCDPI a teacher licensure program, allowing teachers to progress from a SP1 License to a SP2 License and renew SP2 Licenses from time to time. Educators who qualify for Lateral Entry in North Carolina will be considered for employment as teachers. Teachers designated as Department Heads will be responsible for necessary evaluation and reporting on programs and staff and will possess experience and/or advanced credentials commensurate with the position.

PRINCIPAL

The Principal will provide educational and operational leadership, contractual accountability and logistical direction as part of his/her responsibility for the day-to-day management of the school. The Principal is accountable to the Board of Directors. Minimum qualifications include a Bachelors Degree and at least 5 years of experience applicable to the spectrum of responsibilities required at the executive leadership level.

ASSISTANT PRINCIPAL

Assistant Principal is responsible for interim management of the school in the absence of the Principal and reports to the Principal. The Assistant Principal will also supervise the evaluation of instructional and non-instructional staff, will oversee and coordinate professional development programming and will serve as the chief disciplinarian in the event of student misconduct. Qualifications include possession of a valid state teaching certificate with preference given to those candidates with administrative certification through a recognized or accredited training program.

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BUSINESS/FINANCE OFFICER

The Business/Finance Officer is responsible for managing the purchasing, accounts payable, payroll, budget and financial reporting functions of the school. The Finance Officer will provide regular financial and budget reports (via the O.A.R.) to the board, assist in drafting the annual budget and coordinate the annual audit. Qualifications include a bachelor's degree in finance, accounting or a related field. In lieu of a bachelor's degree, candidates may qualify by demonstrating comparable experience in school business.

GUIDANCE COUNSELOR

The primary function of the Guidance Counselor is to provide a comprehensive competency-based counseling program focused on the learning, personal/social and career/vocational needs of all students. The Guidance Counselor will hold a Master Degree in Guidance and preferably be licensed or certified in the field of counseling. The Guidance Counselor will have a minimum of three years of teaching, counseling, or other experience working with children similar in age to the position hired.

HEALTH AND WELLNESS DIRECTOR

The Health and Wellness Director will be responsible for coordinating curricular programming related to nutrition and physical fitness. The Health and Wellness Director will hold a Bachelors Degree in a fitness or nutrition-related field and be certified in personal training or comparable qualification.

OTHER ADMINISTRATIVE/SUPPORT PERSONNEL

Other administrative and support personnel will be responsible for carrying out support functions as delegated to them by the Principal and will require applicable credentials and requisite experience based on the position's duties and responsibilities.

Staff Evaluation and Professional Development

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

The Assistant Administrator, directed by the Chief Administrator and assisted by applicable administrative support staff, is responsible for maintaining teacher licensure and professional development.

2. *Provide a detailed plan noting how the school will mentor, retain, and evaluate staff in a format that matches the school's mission, educational program, and meet the teacher certification and licensure requirements for teachers as prescribed by state law and No Child Left Behind. Be sure this overview matches with the projected staff and funding of the proposed budget section.*

Fortis will model the North Carolina Teacher Evaluation Process which is based on the Framework for 21st Century Learning and the North Carolina Professional Teaching Standards in order to assess the teachers performance in relation to those standards and to design a plan for professional growth. In addition, the school will develop an evaluation rubric modeled after the Rubric for Evaluating North Carolina Teachers. The Chief Administrator or a designee will conduct the evaluation process in which the teacher will actively participate through the use of self-assessment, reflection, presentation of artifacts, and classroom demonstration(s).

Instructional staff will be evaluated based on the six aligned standards

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adopted by the NCSBE (Leadership, Establishing a Respectful Environment, Content Knowledge, Facilitation of Learning, Critical Reflection, Contribute to Academic Success).

The evaluation process will include the following components:

Component 1: TRAINING

Before participating in the evaluation process, all teachers, administrators and peer evaluators must complete training on the evaluation process.

Component 2: ORIENTATION

Within two weeks of a teachers first day of work in any school year, the Chief Administrator will provide teachers with the evaluation rubric that will be used during the evaluation process and a schedule for completing each component of the evaluation process.

Component 3: SELF-ASSESSMENT

Using the evaluation rubric along with feedback, growth and improvement plans from previous evaluations, the teacher will conduct a performance self-assessment from the beginning of the year through to the date of the most recent evaluation period.

Component 4: PRE-OBSERVATION CONFERENCE

Before the first formal observation, the Chief Administrator will meet with the teacher to review and discuss the self- assessment, the teachers most recent professional growth plan, and the lesson(s) to be observed. The teacher will provide the Chief Administrator with a written lesson plan. The goal of this conference is to prepare the Chief Administrator for the observation. In the event that there are multiple observations, pre-observation conferences are not required for subsequent observations.

Component 5: OBSERVATIONS

Formal observations by the Chief Administrator will be made for a minimum of 45 minutes or the entire class period. If a class period is less than 45 minutes, then the evaluation will be made over two class periods to fulfill the minimum time requirement. Those teachers who are designated as Probationary will undergo no fewer than three formal classroom observations, one of which must be conducted by a peer designated by the Chief Administrator. Career teachers will be evaluated no fewer than two times per year. During observations, the Chief Administrator and the peer will note, in writing, the teachers performance in relation to the standards contained in the evaluation rubric.

Component 6: POST-OBSERVATION CONFERENCE

The Chief Administrator (and peer for probationary teachers) shall conduct a post-observation conference with the teacher being evaluated no later than ten days after each formal observation. During the post-observation conference, the Chief Administrator and teacher shall discuss and document on the evaluation rubric the performance strengths and weaknesses during the observed lesson.

Component 7: PROFESSIONAL DEVELOPMENT PLAN

Based on the teacher's performance, a professional development plan will be crafted that outlines specific areas for improvement, strategies for

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improvement, benchmarks to be met and a timeline for re-evaluation.

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

The Fortis professional development plan has as its nucleus a commitment to a mission-driven charter school, high quality instruction and constant improvement of student learning. Through the use of qualified contractors, trained in-house staff, professional conferences, guest speakers and online learning the professional development program will include topics of current interest and contemporary relevance such as effective classroom management, evidence-based instructional strategies, engaging parents and families in the educational process, technology in the classroom and other applicable topics. In addition to self-study or a strict group lecture format, professional development programs will emphasize small group instruction and discussion, peer collaboration and teamwork. Workplace issues will also be incorporated into the professional development program covering topics such as maintaining a safe workplace, First Aid/CPR/AED training, effective communication, preventing sexual harassment and cultivating a culture of diversity in the workplace. The Fortis professional development plan will also show a commitment to the personal side of faculty development with programming focusing on personal nutrition, fitness and well being, and strategies for developing a long term health and fitness plan.

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

Pre-opening professional development will begin 2 weeks (10 weekdays) prior to the first day of school for students. Faculty and staff will report to school at 8am and remain until 2pm. Each day will include approximately 60-90 minutes for classroom setup and readying and 30 minutes for lunch. The remaining 35-40 hours will be used for professional development. Approximately 10-15 hours will be used to train the staff on all operating policies and procedures including school safety plans, Code of Ethics, employment policy review, student referrals for discipline, student referrals for special education, managing/reporting workplace violence (including sexual harassment) and other procedural, safety and policy topics. An additional 5-10 hours will be designed to build a culture of collaboration among the staff through icebreakers, team building exercises, simulations and small-group problem solving. The remaining time will be used to orient the staff toward school-wide instructional objectives during which the instructional goals and measurement criteria for student performance will be discussed in detail as a group. Here we, also, will be addressing the fitness component of Fortis and how that applies to the faculty and staff in their classrooms as well as their professional development. Breakout time will be incorporated into the instructional objectives program for instructional/grade teams, led by grade leaders, to meet and define specific objectives within their grades, develop team-wide instructional strategies, create action-plans for anticipated obstacles and challenges, coordinate lesson plans and synthesize curriculum components within the grade.

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

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The school calendar provides approximately 20-25 hours of designated staff development time throughout the school year in the form of 6 half-days in September, October, November, January, February and April. School will not be in session for students during these days but faculty and staff will be required to report to work. The programming for each day will be determined based on trending hot-topics and needs identified by the board, administration and/or faculty and staff. In addition, the school will advise teachers of short (1-2 hour) topic-specific online and webinar based voluntary learning opportunities that are available throughout the year. If teachers choose to participate in such opportunities, arrangements will be made in advance so that classes can be covered during the time that the teacher is participating in staff development.

Enrollment and Marketing:

Reaching the full capacity for enrollment will be critical to obtain the necessary financial resources to keep your school viable and operating efficiently. In addition, it is required by law that charter schools provide equal access to all students. Read the charter school state statute regarding admissions GS 115C.238.29F(g) (1-7) carefully.

Marketing Plan

Marketing to potential students and parents is vital to the survival of a charter school. Provide a plan indicating how the school will market to potential students and parents in order to reasonably reflect the racial/ethnic and demographic composition of the district in which the charter school will be located or of the special population the school seeks to serve: (G.S.115C-238.29F(g)(5)).

The School will use a variety of methods to promote the school and attract students and families. Some of these methods may include, but are not limited to the following: 1) Holding periodic informational meetings with local community, civic and religious organizations along with individual meetings with local business and civic leaders and other people who may be able to inform and/or influence families and students to enroll at the School; 2) Creating a referral network by fostering relationships with local childcare centers, the Boys and Girls Club of Davidson County, community sporting leagues and the J. Smith Young YMCA ; 3) Advertisements throughout the community; 4) Creation and promotion of online marketing videos and 5) Promotion of the school website where parents can find enrollment and recruitment literature.

The Board recognizes the importance of community awareness and recruitment of parents and students. In order to promote a neighborhood school environment, the marketing strategy will start in the immediate area and then broaden to the mass market. Marketing to residents in the surrounding communities will be the primary focus. In order to ensure strong demand, marketing will occur to all appropriate populations (e.g., geographic, ethnic, age, etc.). We anticipate that the majority of students will live within a 25-mile radius of the school and, thus, reflect the local community being served. Targeted marketing will be used to focus on this geographic area. Additionally, select marketing materials will be created and produced in multiple languages based on the demographics of the local area.

Parent and Community Involvement

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

Fortis sees volunteers, parents and community members as much more than a source of free labor, monetary support or potential customers. The school believes that engaging these groups creates meaningful ways to include individuals in emotional experiences that help them connect to the school's mission and core values. We value them for what they can do as evangelists for the cause of public education, specifically public charter schools. To that end, drawing parents and community members into the everyday work, progress, disappointments and victories is crucial. To achieve this level of engagement, Fortis will host community events, public forums and information meetings where the communication is two-way. We will utilize parental suggestions and guidance when developing certain aspects of the school's instructional and non-instructional programming and we will actively welcome and enlist volunteers to share the message and mission of Fortis. In addition, Fortis will seek to nurture partnerships and relationships with other area charter schools and non-profit organizations committed to student learning by sharing information, expertise and talent as a means of fostering mutual support.

Admissions Policy

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

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

Except as otherwise provided by law or the mission of the school as set out in this charter, Fortis Academy shall not limit admission to students on the basis of intellectual ability, measures of achievement or aptitude, athletic ability, disability, race, creed, gender, national origin, religion, or ancestry.

Pre-admission activities will be limited to providing interested parents with a letter of interest that will include the child's name, grade and contact information for the parents. The letter of intent will be clearly marked so as to identify that it is not an enrollment document or an application. It will be used for continued outreach and as a preliminary planning tool for resources and staffing. We will enroll for the 2016-2017 school year, beginning the day following final approval by the NCSBE and continuing through April 2016. At that time, the determination will be made regarding a necessary lottery or whether to continue rolling enrollment until all spaces are filled. If there is a need for the lottery, it will be

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held in late April 2016.

We will enroll any eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, class, grade level, or building. In this case, students shall be accepted by lot. Once enrolled, students are not required to reapply in subsequent enrollment periods. Notwithstanding any law to the contrary, Fortis Academy may refuse admission to any student who has been expelled or suspended from a public school under G.S. 115C390.5 through G.S. 115C390.11 until the period of suspension or expulsion has expired.

Any student, residing in the state of North Carolina, must complete the application process to be considered for enrollment. The required application will consist of, and may not be limited to, the following: a personal application form which includes student's name, place of residence, parent/guardians' names and addresses, student's birth date, present school enrollment, current grade.

Following the first year of operations, Fortis Academy may give enrollment priority to siblings of currently enrolled students who were admitted to Fortis Academy in the previous year and to children of the school employees. If multiple birth siblings apply for admission to a charter school and a lottery is needed under G.S.115C238.29F(g)(6), the charter school will capitulate with prevailing law regarding admission of multiple birth siblings.

No criteria for admission will be utilized other than a completed application form and residence in North Carolina. A waitlist will be maintained in the event that space becomes available and the school chooses to continue to fill any open enrollment positions. The parents of students may withdraw or transfer their children at any time. Students' records will be forwarded as official documents to the child's receiving school. In order for parents to re-enroll their students at a later time, they must go back through the school's admission process.

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PROJECTED ENROLLMENT

2016-17 through 2020-2021

IDENTIFY LEA FROM WHICH STUDENTS WILL PROBABLY COME

- LEA #1 Lexington City Schools
- LEA #2 Davidson County Schools
- LEA #3 Thomasville City Schools

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

	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	LEA 291	LEA 290	LEA 292	LEA 291	LEA 290	LEA 292	LEA 291	LEA 290	LEA 292	LEA 291	LEA 290	LEA 292	LEA 291	LEA 290	LEA 292
Kindergarten	46	13	7	46	13	7	46	13	7	62	18	8	62	18	8
Grade 01	46	13	7	46	13	7	46	13	7	46	13	7	62	18	8
Grade 02	46	13	7	46	13	7	46	13	7	46	13	7	46	13	7
Grade 03	46	13	7	46	13	7	46	13	7	46	13	7	46	13	7
Grade 04	46	13	7	46	13	7	46	13	7	46	13	7	46	13	7
Grade 05	46	13	7	46	13	7	46	13	7	46	13	7	46	13	7
Grade 06	46	13	7	46	13	7	46	13	7	46	13	7	46	13	7
Grade 07	0	0	0	46	13	7	46	13	7	46	13	7	46	13	7
Grade 08	0	0	0	0	0	0	46	13	7	46	13	7	46	13	7
	322	91	49	368	104	56	414	117	63	430	122	64	446	127	65
	462			528			594			616			638		

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Section IV: Governance and Capacity
Concerns and Additional Questions

Reviewer

**Page
Reference**

Reviewer

Score

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V. OPERATIONS

Transportation Plan:

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

Fortis expects that many children in the Lexington area will require transportation to-and-from school as a condition of attending. In accordance with state law, Fortis must ensure that transportation is not a barrier to attendance or a deterrent to children who wish to enroll at Fortis. With these two facts in mind, Fortis has made provisions within its budget to provide a limited busing option that will establish designated school bus drop-off and pick-up points throughout the community. School leaders will encourage parents to work with one another to arrange for children to be delivered to the pick-up and drop-off locations.

For those parents who will be driving their children to school, we will facilitate the creation of a car pooling network among parents.

Fortis will also meet with the Davidson County Department of Transportation to arrange for a public transit options for our students on the Lexington Circulator Loop, a public busing route consisting of 22 stops throughout Lexington. Fortis has allocated an amount within its budget to purchase discounted bus passes for our students and we will provide transportation to-and-from the Lexington Circulator Loop stop closest to the school's location.

Lastly, Fortis will reach out to Davidson County Schools, Thomasville City Schools and Lexington City Schools to open a dialogue regarding the options available for shared busing of students, including the identification of district schools to serve as shuttle stops for Fortis buses or possibly compensating the school districts for the transportation of Fortis Academy students.

School Lunch Plan:

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

As part of the stated mission of Fortis, all students will have access to quality nutrition during their day. Fortis currently intends to participate in the USDA National School Lunch Program (often referred to as the free and reduced lunch program) as a means of ensuring that no child is lacking a daily meal. Fortis's goal is to ensure that meal costs are not a burden for parents of children who make Fortis their school of choice. The budget currently includes an investment in child nutrition to ensure that no child lacks a daily meal and Fortis Academy intends to seek reimbursement under the NSLP and Title I programs to replace funds currently allocated in the budget from local and state ADM dollars.

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Aligning with its nutrition and health-focused mission, Fortis will seek to provide educational activities to students that emphasize food, farming, and nutrition by qualifying to participate in the USDA's Farm-to-School program. Across the country, an increasing number of schools and districts have begun to source more foods locally. This nationwide movement to enrich children's bodies and minds while supporting local economies is referred to as "farm to school." The term encompasses efforts that bring local or regionally produced foods into school cafeterias; hands-on learning activities such as school gardening, farm visits, and culinary classes; and the integration of food-related education into the regular, standards-based classroom curriculum. The United States Department of Agriculture (USDA) supports such efforts through its Farm to School Program, which includes research, training, technical assistance, and grants.

Lastly, Fortis will reinvest any funds reimbursed through federal school nutrition funds to enhance the child nutrition program by offering school-provided, healthy snacks throughout the day and the addition of nutrient rich meal offerings, all-organic options, gluten-free meals and vegetarian/vegan choices.

Civil Liability and Insurance (GS 115C-238.29F(c)):

The Charter School shall obtain and maintain insurance at a minimum in the following amounts:

1. Errors and omissions: one million dollars (\$1,000,000) per claim;
2. General liability: one million dollars (\$1,000,000) per occurrence;
3. Boiler and machinery: the replacement cost of the building;
4. Real and personal property: the appraised value of the building and contents;
5. Fidelity bonds: no less than two hundred fifty thousand dollars (\$250,000) to cover employee dishonesty;
6. Automobile liability: one million dollars (\$1,000,000) per occurrence; and
7. Workers' compensation: as specified by Chapter 97 of the General Statutes.

Area of proposed coverage	Proposed amount of coverage		Cost (Quote)
Comprehensive General Liability	\$1,000,000		\$4,340.00
Officers and Directors/Errors and Omissions	\$1,000,000		\$900.00
Property Insurance	\$1,000,000		\$1,738.00
Motor Vehicle Liability	\$1,000,000		\$1,100.00
Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$625.00
Other	\$2,500,000		\$8,995.00
Total Cost			\$17,698.00

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

Health and Safety Requirements:

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

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115C238.29F (a).

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

dparkes12 09/26/2014

(Board Chair Signature)

(Date)

Facility:

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

What is your plan to obtain a building? Identify the steps that the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. If a facility has been identified please fill out the Facility Form (Appendix Q).

Fortis Academy has identified two potential sites that could serve as the facility location for the school. The first is a former graphics plant with 40,000 sq feet of space available sitting on a 5 acre parcel. The facility is centrally located to Lexington and available for sale. We would plan to work with a developer such as Charter School Capital who would purchase the property, invest in necessary upgrades and renovations and lease it back to us under a long-term lease. Since the facility itself would not provide the total amount of square footage that Fortis would need to operate, we would also work with Mobile Modular or a similar modular facility provider to place modulars the property to supplement our space needs. The long-term goal would be to acquire an adjoining, 4 acre parcel and begin construction on a permanent facility. Very rough estimates would put the total, initial project costs (excluding modulars) at \$1.5M. The annual lease rate through the developer would be 10% of the total project cost with a 1.03 multiplier beginning in Year 3. The estimated annual costs of placing modulars on the site would be \$87,000 plus setup fees.

Our second facility option is an 18 acre parcel of land located less than a mile from I-85 Business, US-29 and US-70. Our plan for this piece of property would be to establish a modular solution with a long term plan to build a permanent facility. The land is central to Lexington, zoned for educational use and is already equipped with infrastructure such as water, sewer and natural gas. A modular setup on this property would cost approximately \$22,000 per month plus setup fees.

When the Fortis Academy preliminary charter is awarded, the board will immediately reach out to the developer who will begin working with its real-estate broker to evaluate both sites. We will have a review conducted by a structural engineer on the first site to determine necessary up-fitting (and associated costs) required for obtaining a certificate of occupancy. Fortis will also begin discussions with the modular provider to design space needs and layout for the modular piece of the solution. After the applicable due

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diligence, we will select a site and begin construction.

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

Average per square foot costs for the options above range from \$4.90 - \$6.38/sq ft/yr. According to Loopnet Market Trends, the 2013 average specialized use lease rate in Lexington was \$5.73/sq ft/yr.

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

In the event that our identified sites are not available or if adequate sales/leasing rates cannot be agreed upon, a contingency facility will be identified within the same, general vicinity. The facilities committee for Fortis will meet semi-monthly to monitor the status of the identified sites and will be charged with identifying an alternate, contingency site should circumstances warrant.

Ideally, any contingency site will meet space requirements and will minimize the need to eliminate or curtail any programming. A contingency site with fewer square feet of usable space would also have to include sufficient property to supplement the square footage with a modular setup. Possible contingency sites may include a church facility with instructional classrooms, a community center or other such facility that will provide sufficient, interim space for instructional programming and daily operations or the development of unused retail space. Fortis would also explore other available raw land, including a large, retail parking lot, as an option to install a temporary modular facility until such time as a permanent facility can be completed. As a last resort, if instructional square footage is at a premium, administrative offices for the business operations as well as storage for supplies might be relocated off site.

Preparation for a contingency site will begin immediately upon award of the preliminary charter. Fortis has already identified a commercial realtor with knowledge of the Lexington real estate market who has worked with several charter schools throughout North Carolina. This broker will contact property owners as well as organizations that occupy/own available space to explore potential alternate sites.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
A plan for the related service of "special transportation" for students with disabilities was not described in the application.	Carol Ann Hudgens	Transportati
Including the local school district in the plan may not be favorable if a relationship has not been established.	Lisa Swinson	Transportati
unclear how or who will be responsible for undertaking these actions, when they will take place, or how costs were determined. Unclear what portion of carpooling or PT costs would be covered by the school. Have any other schools managed to share buses with a district?	Kristen Vandawalker	Transportati
The narrative does not indicate how the school will provide the lunch program (e.g. in-	Kathryn Mullen Upton	School Lunch

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house, contracted). Question for interview: please describe how food service will be provided.		
This school lunch plan is aligned with the school's mission.	Lisa Swinson	School Lunch
Unclear who or how these plans will be carried out. Will standard FRL meals meet the requirements of the wellness program (they don't at my child's school). Is acceptance into the FTS program guaranteed or competitive.	Kristen Vandawalker	School Lunch
The figure here and the figure in the expenditure budget differ slightly.	Kathryn Mullen Upton	Civil Liabil
\$87,000 for modular doesn't seem realistic.	Lisa Swinson	Facility and
unclear whether the applicant has spoken in detail to any of the organizations mentioned and /or where the numbers mentioned come from. unclear whether the \$/sf numbers are realistic, the basis for the numbers provided, or how they compare to other school rental amounts. No true plan to acquire a permanent, temporary, or contingency facility exists.	Kristen Vandawalker	Facility and
If the school enters into an agreement with a property developer, care should be taken to ensure the terms of the lease are fair and reasonable.	Kathryn Mullen Upton	Facility and
Contingency sites have not been identified.		

Reviewer	Score
Joe Maimone	
Carol Ann Hudgens	
Kathryn Mullen Upton	Pass
Eric Sanchez	
Helen Nance	
Mike McLaughlin	
Sherry Reeves	
Kristen Vandawalker	Fail
Tammi Sutton	
Lisa Swinson	Pass
Steven Walker	

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VI. FINANCIAL PLAN

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

Budget: Revenue Projections from each LEA 2016-17

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

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

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

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

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

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

REFER TO RESOURCE GUIDE FOR ADDITIONAL INFORMATION AND SOURCE DOCUMENTS

LEA #1 291 - Lexington City Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$5,052.24	322	\$1,626,821.28
Local Funds	\$1,107.91	322	\$356,747.02
Federal EC Funds	\$3,768.11	49	\$184,637.39
Totals			\$2,168,205.69

LEA #2 290 - Davidson County Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$4,555.24	91	\$414,526.84
Local Funds	\$1,089.77	91	\$99,169.07
Federal EC Funds	\$3,768.11	14	\$52,753.54
Totals			\$566,449.45

LEA #3 292 - Thomasville City Schools

Revenue	2014-2015 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2016-2017
State Funds	\$5,228.05	49	\$256,174.45
Local Funds	\$1,126.04	49	\$55,175.96
Federal EC Funds	\$3,768.11	6	\$22,608.66
Totals			\$333,959.07

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Total Budget: Revenue Projections 2016-17 through 2020-2021

INCOME: REVENUE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
-State ADM Funds	\$2,297,523	\$2,624,043	\$2,952,260	\$3,061,949	\$3,171,129
-Local Per Pupil Funds	\$511,092	\$583,996	\$657,010	\$681,365	\$705,689
-Exceptional Children Federal Funds	\$260,000	\$298,434	\$335,739	\$348,173	\$360,608
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$3,068,614	\$3,506,473	\$3,945,009	\$4,091,487	\$4,237,426

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

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

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Personnel Budget: Expenditure Projections 2016-17 through 2010-2021

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

BUDGET EXPENDITURE PROJECTIONS Personnel	2016-2017			2017-2018			2018-2019			2019-2020			2020-2021		
	Num Staff	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary	FTE	Avg Salary	Total salary
Administrative & Support Personnel:															
Principal	1	\$60,000	\$60,000	1	\$61,500	\$61,500	1	\$63,038	\$63,038	1	\$64,538	\$64,538	1	\$66,038	\$66,038
Asst Principal	1	\$40,000	\$40,000	1	\$41,000	\$41,000	1	\$42,025	\$42,025	1	\$43,025	\$43,025	1	\$44,025	\$44,025
Business Manager	1	\$35,000	\$35,000	1	\$35,875	\$35,875	1	\$36,772	\$36,772	1	\$37,772	\$37,772	1	\$38,772	\$38,772
Admin / Clerical	1	\$25,000	\$25,000	2	\$25,625	\$51,250	2	\$26,266	\$52,532	2	\$27,054	\$54,108	3	\$27,865	\$83,595
Guidance	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$40,000	\$40,000	1	\$41,200	\$41,200
Food Service	1	\$26,000	\$26,000	1	\$26,650	\$26,650	2	\$27,316	\$54,632	2	\$28,136	\$56,272	2	\$28,980	\$57,960
Food Service - Part Time	0	\$0	\$0	1	\$13,000	\$13,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Custodial	1	\$26,000	\$26,000	1	\$26,650	\$26,650	2	\$27,316	\$54,632	2	\$28,136	\$56,272	2	\$28,980	\$57,960
Custodial - Part Time	0	\$0	\$0	1	\$13,000	\$13,000	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0
Nurse	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$31,827	\$31,827
Nurse - Part Time	0	\$0	\$0	0	\$0	\$0	1	\$15,000	\$15,000	1	\$15,000	\$15,000	0	\$0	\$0
A - Total Admin and Support:	6		\$212,000	9		\$268,925	10		\$318,631	11		\$366,987	12		\$421,377
Instructional Personnel:															
Core Content Teacher(s)	21	\$34,500	\$724,500	24	\$35,363	\$848,712	27	\$36,247	\$978,669	28	\$37,334	\$1,045,352	29	\$38,454	\$1,115,166

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Electives/Specialty Teacher(s)	5	\$34,500	\$172,500	6	\$35,363	\$212,178	7	\$36,247	\$253,729	9	\$37,334	\$336,006	8	\$38,454	\$307,632
Exceptional Children Teacher(s)	2	\$37,000	\$74,000	3	\$37,242	\$111,726	4	\$37,823	\$151,292	5	\$38,741	\$193,705	5	\$39,903	\$199,515
Subs (Days)	280	\$110	\$30,800	330	\$115	\$37,950	380	\$120	\$45,600	420	\$125	\$52,500	420	\$130	\$54,600
Teacher Assistants	5	\$22,400	\$112,000	6	\$22,892	\$137,352	7	\$23,639	\$165,473	8	\$24,348	\$194,784	9	\$24,999	\$224,991
B - Total Instructional Personnel:	313		\$1,113,800	369		\$1,347,918	425		\$1,594,763	470		\$1,822,347	471		\$1,901,904
A+B = C - Total Admin, Support and Instructional Personnel:	319		\$1,325,800	378		\$1,616,843	435		\$1,913,394	481		\$2,189,334	483		\$2,323,281
Administrative & Support Benefits															
Health Insurance	6	\$5,200	\$31,200	8	\$5,720	\$45,760	10	\$6,292	\$62,920	11	\$6,921	\$76,131	12	\$7,613	\$91,356
Retirement Plan--Other	6	\$2,025	\$12,150	8	\$2,010	\$16,080	10	\$1,902	\$19,020	11	\$1,995	\$21,945	12	\$2,089	\$25,068
Medicare	6	\$489	\$2,934	8	\$486	\$3,888	10	\$460	\$4,600	11	\$482	\$5,302	12	\$505	\$6,060
Social Security	6	\$2,093	\$12,558	8	\$2,077	\$16,616	10	\$1,965	\$19,650	11	\$2,062	\$22,682	12	\$2,159	\$25,908
Unemployment	6	\$280	\$1,680	8	\$251	\$2,008	10	\$251	\$2,510	11	\$251	\$2,761	12	\$251	\$3,012
D - Total Admin and Support Benefits:	30		\$60,522	40		\$84,352	50		\$108,700	55		\$128,821	60		\$151,404
Instructional Personnel Benefits:															
Health Insurance	33	\$5,200	\$171,600	39	\$5,720	\$223,080	45	\$6,292	\$283,140	50	\$6,921	\$346,050	51	\$7,613	\$388,263
Retirement Plan--Other	33	\$2,025	\$66,825	39	\$2,074	\$80,886	45	\$2,127	\$95,715	50	\$2,187	\$109,350	51	\$2,240	\$114,240
Medicare	33	\$489	\$16,137	39	\$501	\$19,539	45	\$514	\$23,130	50	\$528	\$26,400	51	\$541	\$27,591
Social Security	33	\$2,093	\$69,069	39	\$2,143	\$83,577	45	\$2,198	\$98,910	50	\$2,260	\$113,000	51	\$2,315	\$118,065
Unemployment	33	\$280	\$9,240	39	\$280	\$10,920	45	\$281	\$12,645	50	\$282	\$14,100	51	\$283	\$14,433
E - Total Instructional Personnel Benefits:	165		\$332,871	195		\$418,002	225		\$513,540	250		\$608,900	255		\$662,592
D+E = F - Total Personnel Benefits	195		\$393,393	235		\$502,354	275		\$622,240	305		\$737,721	315		\$813,996
A+D = G - Total Admin	36		\$272,522	49		\$353,277	60		\$427,331	66		\$495,808	72		\$572,781

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and Support Personnel (Salary & Benefits)														
B+E = H - Total Instructional Personnel (Salary & Benefits)	478		\$1,446,671	564		\$1,765,920	650		\$2,108,303	720		\$2,431,247	726	\$2,564,496
G+H = J - TOTAL PERSONNEL	514		\$1,719,193	613		\$2,119,197	710		\$2,535,634	786		\$2,927,055	798	\$3,137,277

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Operations Budget: Expenditure Projections
2016-17 through 2020-2021

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
	Administrative & Support:					
Other	Ff&E Purchases And Leasing	\$65,000	\$68,000	\$71,000	\$25,000	\$25,000
	Fitness Equipment Leases	\$20,000	\$21,000	\$22,050	\$10,000	\$10,500
	Office Equipment Leases	\$3,000	\$3,000	\$3,000	\$3,000	\$3,000
	Marketing	\$7,500	\$2,000	\$2,000	\$2,000	\$2,000
	Admin Computers And Software	\$5,000	\$2,000	\$2,000	\$4,500	\$2,000
	Insurance	\$17,968	\$18,866	\$19,809	\$20,800	\$21,840
	Telecommunications	\$5,000	\$5,500	\$5,665	\$5,834	\$6,010
Professional Contract	Audit	\$0	\$10,000	\$10,000	\$12,000	\$12,000
	Operations, Hr, Compliance And Training Support	\$219,450	\$190,080	\$196,020	\$0	\$0
	Planning Year Assistance (Pd Over 3 Yrs)	\$42,000	\$42,000	\$42,000	\$0	\$0
	Legal Services	\$2,500	\$3,500	\$3,500	\$4,500	\$4,500
	Child Nutrition	\$250,000	\$275,000	\$288,750	\$300,000	\$315,000
Facilities	Facilities Lease	\$255,000	\$265,000	\$275,000	\$275,000	\$275,000
	Maintenance	\$7,500	\$8,250	\$9,075	\$9,982	\$10,980
	Custodial Supplies	\$17,000	\$19,000	\$20,000	\$22,000	\$24,000
	Pest Control	\$2,000	\$2,100	\$2,200	\$2,300	\$2,400
	Security Monitoring	\$1,000	\$1,100	\$1,200	\$1,300	\$1,400
	Utilities	\$67,500	\$70,000	\$72,500	\$75,000	\$80,000
Transportation	Bus Leases	\$40,000	\$45,000	\$50,000	\$52,500	\$55,000
	Fuel / Maintenance / Inspections	\$41,625	\$48,900	\$56,000	\$58,000	\$60,000
	Drivers (Contracted)	\$45,000	\$47,500	\$50,000	\$52,500	\$55,000
	Public Transportation Vouchers	\$5,000	\$5,250	\$5,500	\$5,750	\$6,000
	K - TOTAL Administrative & Support Operations	\$1,119,043	\$1,153,046	\$1,207,269	\$941,966	\$971,630
	Instructional:					
Books And Supplies	Textbooks	\$100,000	\$10,000	\$10,000	\$10,000	\$10,000
	Instructional And E.C. Supplies	\$15,000	\$16,500	\$18,000	\$20,000	\$22,000
	Paper, Printing And Supplies	\$17,500	\$19,500	\$21,500	\$22,500	\$23,000
	Dues And Subscriptions	\$1,200	\$1,400	\$1,500	\$1,750	\$2,000
Classroom Technology	Student Technology And Devices	\$8,600	\$1,500	\$1,500	\$1,500	\$1,500

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	Instructional Software	\$7,500	\$3,500	\$3,500	\$3,500	\$3,500
	Hardware, Peripherals, Wiring	\$5,000	\$2,500	\$1,000	\$1,000	\$1,000
	Classroom Projectors And Interfaces	\$5,000	\$5,000	\$2,500	\$2,500	\$2,500
Instructional Contract	E.C. And Speech Services	\$10,000	\$13,000	\$13,500	\$14,000	\$14,500
	Psychological And Guidance	\$7,500	\$7,500	\$7,500	\$5,000	\$5,000
	Fitness Assessments And Tracking	\$7,500	\$8,000	\$8,500	\$9,000	\$9,500
	Tutoring And Enrichment	\$3,500	\$4,000	\$4,500	\$5,000	\$5,500
	Workshops, P.D. And Certification Courses	\$15,000	\$10,500	\$11,000	\$11,500	\$12,000
	L - TOTAL Instructional Operations	\$203,300	\$102,900	\$104,500	\$107,250	\$112,000
	K+L = M - TOTAL OPERATIONS	\$1,322,343	\$1,255,946	\$1,311,769	\$1,049,216	\$1,083,630

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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021
J - TOTAL PERSONNEL	\$1,719,193	\$2,119,197	\$2,535,634	\$2,927,055	\$3,137,277
M - TOTAL OPERATIONS	\$1,322,343	\$1,255,946	\$1,311,769	\$1,049,216	\$1,083,630
J+ M =N TOTAL EXPENDITURES	\$3,041,536	\$3,375,143	\$3,847,403	\$3,976,271	\$4,220,907
Z - TOTAL REVENUE	\$3,068,614	\$3,506,473	\$3,945,009	\$4,091,487	\$4,237,426
Z - N = SURPLUS / (DEFICIT)	\$27,078	\$131,330	\$97,606	\$115,216	\$16,519

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

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

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

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

Provide the break-even point of student enrollment.

EVIDENCE OF DEMAND FOR SCHOOL CHOICE

Davidson County is among the 40+ North Carolina counties that lacks a school public charter school option. According to data compiled by the NC Department of Administration, 10.6% of Davidson County, Lexington City and Thomasville City students were home-schooled during the 2011-12 school year. This compares with a statewide homeschooling average of 6.5%. Additionally, just under 1,000 Davidson County students attend private schools or charter schools in other areas, according to the Department of Non-Public Instruction. With nearly 15% of parents in Davidson County, Lexington City and Thomasville City seeking out alternatives to the traditional public school system, it's clear that demand currently exists for a charter school in central North Carolina.

COMMUNITY SURVEYS

The Board of Fortis Academy wanted to ascertain whether local demand existed in the target area before beginning preparations and making application for a charter school, so between June and September, we distributed 500 surveys throughout Lexington, Thomasville and certain areas of Davidson County. We received a response rate of 43% (215 responses), more than 2/3 of which came from parents living in and around Lexington. When asked if the respondent would support a quality school of choice in Davidson County, 99% responded 'Yes'. Of those who completed the surveys, 74.2% stated that they had children who would be enrolling in Grades K-6 in the fall of 2016. Additionally, we held a community meeting on August 14th in Lexington during which the majority of the 60+ attendees expressed support for a school of choice, including a Davidson County school teacher who had been named the Teacher of the Year.

PERFORMANCE LAGS

The performance lag in Lexington City Schools has been highlighted in earlier sections of this application as it relates to need. Davidson County is a culturally and economically diverse community with several segments of minority populations represented. Davidson County test results show representative academic improvement among all segments of the population,

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however, Lexington City shows virtually none of the population segments of the community performing above the state level or showing adequate academic improvement. Lexington schools superintendent, Rick Kriesky recognized those academic achievement struggles in a recent interview when he responded to the question of whether the local district had a ways to go in increasing growth. Kriesky responded, "Absolutely. We do have challenges."

Fortis believes that its enrollment targets are reasonable based on the dimensions we've outlined above supporting demand for a school of choice.

We calculated the student enrollment break-even point in Years 1-5 of Fortis's operations. The break-even enrollment is as follows:

Yrs 1/2/3/4/5
Enrollment 462/528/594/616/638
Break-even 431/476/519/504/619

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

In the event that unforeseen circumstances occur that negatively affect revenues, two strategies will be employed depending upon the cause.

Assuming a shortage arising from under-enrollment, Fortis Academy will increase marketing efforts and use every available resource to improve enrollment including expanded outreach to the community, seeking referral partners, and increased exposure and visibility through advertising.

Assuming changes in student funding, Fortis Academy will charge its finance committee with presenting a plan to reduce costs in the following order:

1st - Reduction or elimination of any non-essential fixed costs and renegotiation of leases and non-instructional contracts

2nd - Reduction or elimination of any non-essential, non-instructional variable costs (including non-instructional and administrative salaries and benefits)

3rd - Analysis and strategic reduction, consolidation or combination of expendable, non-essential instructional costs

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

The budget does not rely on sources of funding outside the state and local ADM funding.

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

1:22

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

Student accounting and financial services will be managed on-site by an

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administrative clerk and a business manager, respectively. We have contracted with Prestige Preparatory Schools during our first three years to train, monitor and evaluate the work and progress of those employees. We selected Prestige after a site visit at one of their client schools that opened in Georgia recently. The school opened at full capacity of 760 students with a waiting list of over 700 and they were moving into a new \$8.7M facility. The Chairman of the Board of Directors told us that Prestige had easily invested over 1,500 hours into the school's planning year. The Principal of the school told Fortis that their success was due in large part to Prestige's work. Because of the size of the proposed contract, we carefully scrutinized Prestige's references and the experience of the company leadership. We were also comfortable with the simple termination provisions, which essentially allow for a 180 day notice. Prestige will be providing support and training for other segments of our staff and our school leadership over the next four years. They will be working alongside us during our planning year and then during the first three years of our operations. Throughout that time they will assist with various start-up, instructional and non-instructional functions and help the board and the school leadership implement best-practices that are critical in the early stages of a charter school's development.

Fortis will also contract for specialized student support services in the areas of guidance, counseling, speech therapy, etc. These contracts will be overseen by the Principal.

Regardless of the nature or size of any contract or purchase, a consistent process will be used to select the best provider. First, whenever practical, an RFP (Request for Proposals) will be issued, particularly for large contracts and purchases, wherein prospective providers submit competitive proposals highlighting their experience, history of success, recommendations from prior clients/customers and pricing. RFP opportunities will be published on the Fortis website and publicized using local media outlets. The appropriate board subcommittee and/or the Principal will evaluate proposals, contact references and award the contract based on the best fit and value. The contract deliverables will be evaluated regularly by the administration and annually by the board to determine performance and effectiveness. Fortis will give preference to contractors, suppliers and providers who are local to Lexington. Fortis will also, whenever possible, seek contract terms that are the least restrictive or cumbersome in terms of termination and allow room for reasonable recourse in the event of non-performance.

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

Fortis Academy's mission focuses on integrating the intellectual and the physical. It emphasizes the importance of not only training the mind, but also the body. We have developed our budget with the same confluence of goals.

We begin by offering competitive salaries and benefits to our faculty, but we go beyond to encourage the faculty to grow in much the same way as the students. Our investment in staff development and certification is intended to help our faculty members not only develop their skills in the classroom

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but to also seek out instructor certifications in areas such as physical training, dietetics and nutrition, cycling, marathoning, yoga, etc. Also included in our first year Professional Development is a \$4,500 carve-out for a 3-day classical education training seminar presented by Dr. Christopher Perrin. Dr. Perrin is considered one of the foremost experts on implementing classical studies into a curriculum and will provide hands-on training to better prepare the Fortis faculty team to approach classical instruction.

Fortis has also made provisions in its budget for the acquisition of fitness equipment. This equipment will part of Fortis's on-site physical training studio (similar to a gym or fitness club) and accessible not only to students, but also to faculty and parents. Although physical activity is a critical component of our curriculum, part of maintaining a healthy lifestyle is the ability to assess and track progress and Fortis has included \$7,500 in the first year for fitness assessments with a gradual increase in the investment in subsequent years.

Fortis acknowledges that it must also be mindful of the economic dynamics of the community in which it lives. Although transportation is not permitted to be a barrier to attendance at a charter school, we often know that a lack of transportation in certain communities is a barrier to attendance. Although Fortis cannot make a provision for door-to-door pickup and drop-off of every student at their home, we have included in the budget an allowance for a limited transportation solution that would enable Fortis to lease buses (or contract with a qualified provider) to transport children to and from school from several, designated drop-off/pick-up points throughout the Lexington and Thomasville area. (See the transportation plan section for more information)

Lastly, Fortis is investing in a child nutrition program. Fortis will participate in the NSLP and make application for reimbursement for free and reduced meals and our hope is that the reimbursements will supplant existing ADM funding that we have segregated for child nutrition so that we can then supplement our USDA child nutrition program with school-provided, healthy snacks throughout the day and the addition of farm-to-table, nutrient rich meal offerings.

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

Describe how the school will develop the fund balance.

Fortis goal is to achieve consistent, annual growth to the fund balance of at least 10% over the prior year balance. We believe that measuring growth over the prior year fund balance is more reliable and provides a better benchmark from which to track financial growth and communicate it to constituents.

Fortis will develop its fund balance through a combination of cost-conscious procurement and by enacting fiscal policy that requires a balanced operating budget from year-to-year. The school will leverage debt financing sparingly and only in instances where it is absolutely necessary for operations or preserving working capital.

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Fortis will also make application under several federal grant programs with the expectation that any federal grants received will supplant ADM funds that have been allocated to lines such as special education, child nutrition or staff development, in which case those ADM funds can be reinvested in the educational program or accumulated in the fund balance for future investments or debt reduction.

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

FACILITIES

Fortis's facility will be leased at first. Ideally, the school will be able to identify a space that can be purchased by a developer, such as Charter School Capital, renovated and leased back to the school with room for growth. In this case, the lease would be a long-term lease. The best case scenario would be to work with a lessor who is willing to establish a graduated lease rate that reduces short-term lease payments by deferring them to later years.

TRANSPORTATION

Fortis expects to finance the purchase of 3-5 quality, used school buses and estimates an average acquisition price of \$25K per bus. Through a lender such as Balboa Capital, which has experience in lending to charter schools, Fortis would expect terms and conditions for a 48 month loan at 7.75% interest.

FF&E FINANCING

Fortis Academy will preserve first-year working capital by financing its furniture, fixtures and equipment through Kingsbridge Holdings or a similar FF&E lender. FF&E financing is typically 3 years at 7.5%.

OTHER EQUIPMENT LEASES

Certain equipment, such as photocopiers and laptop computers, are more practically financed through an operating lease. An operating lease is a monthly lease where the equipment is not owned by the lessee at the end of the lease term but is returned to lessor. Generally, with expendable, high use electronics an operating lease makes more sense because the lessor replaces the equipment with new equipment and a renewed lease upon expiration of the lease term. Such arrangements, while slightly more expensive, ensure that the school has the latest technology in good repair. Fortis will leverage operating leases on equipment when it makes good sense to do so.

FITNESS EQUIPMENT LEASES

Because of the large up-front cost of obtaining fitness equipment and the need to preserve working capital, Fortis will lease its fitness equipment using a Fair Market Value (FMV) equipment lease, again through a group such as Balboa Capital. This solution will enable Fortis to obtain equipment that is critical to its mission. At the end of the lease period (typically 3-years) Fortis can take advantage of one of three options: return the equipment, purchase the equipment for a specific amount (typically 3 additional payments) or continue to rent the equipment on a monthly basis. This is the most flexible option for the school. Most FMV leases for equipment are 3-year leases at 9%-11%.

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

The school does not expect to have assets from other sources.

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

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

The Fortis Board, via its finance committee, will establish internal control standards as well as financial policies and procedures to ensure compliance with the Fiscal Control Act and to facilitate annual financial audits, the audit procedures, and the audit requirements adopted by the State Board of Education for charter schools.

Pursuant to instructions received from our meeting with an auditor, the Finance / Audit Committee will be responsible for the oversight of the financial accounting and audit functions at the school. Duties will include:

*Working with school leadership to draft and submit to the board for approval an annual budget

*Meeting with the principal and the business manager on a monthly basis to review the budget report, cash flow and financial performance

*Establishing fiscal policy and procedure in accordance with generally accepted accounting principles

*Issuing the RFP and overseeing the selection process for an annual, independent auditor

*Establish the audit timeline and schedule for fieldwork

*Reviewing and presenting the results of the annual audit to the Board of Directors for approval

*Draft the Management Discussion and Analysis ("MD&A") that accompanies the audit report

*Contribute to the preparation and review of the annual Form 990

*Review potential financing/leasing instruments

*Draft and oversee implementation of organizational and functional level internal controls

Fortis will also employ a full-time, on-site business manager. He or she will be responsible for ensuring compliance with generally accepted standards of fiscal management and for overseeing the day-to-day implementation of fiscal policy and procedure. The Business Manager will also be responsible for all UERS compliance functions and reporting.

Lastly, the board has hired Prestige Preparatory Schools to train, monitor and periodically submit to the board an evaluation of the business manager's work in the functional areas of charter school accounting, financial reporting and budget management. Prestige will also provide annual

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governance training to the Board of Directors that includes an extensive study/lecture unit on Financial Fiduciary Duties of the Board.

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

Fortis is unaware of any known or possible related party transactions at this time.

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

The following firm is being explored to perform the annual, independent financial audit:

Goodson & Taylor, CPAs

4406 Raspberry Rd

Wilmington, NC 28405

(910) 392-4650

(910) 392-3240 - Fax

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Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
The numbers in the narrative don't align with the numbers in the budget.	Lisa Swinson	Personnel Bu
Salaries don't seem to match the personnel section. In particular, the principal salary appears higher and the AP seems lower. Unclear whether salaries are the same for all teachers (this seems unreasonable)? Also, the salaries are only competitive for new teachers without NBCT.	Kristen Vandawalker	Personnel Bu
As noted previously, school leader and staff salaries appear low.	Kathryn Mullen Upton	Personnel Bu
Why do ffe & fitness leases drop off in years 4/5? will less equipment be needed? why are office equipment casts flat? are the "operations" and "planning year" support lines paid to prestige? what is included in these line Is this marketing budget realistic given a 25 mile attendance zone? Why is there such a steep drop off in year 2? What's the basis for facilities and related item expenditures? Are buses leased or purchased? the narrative and this budget seem to disagree. What's the basis for assuming a year/long bus lease will be only \$8k, and that drivers will be only \$9k/year? Why do textbook costs drop off after year 1 and remain flat, even though grades are being added? what type of technology is included here for classrooms? \$8.6k will only buy 34 chromebooks? What type of services and how many students can be served given these low estimates for EC and related services? What does \$3500 cover for tutoring and enrichment? it's relatively common for schools to stipen teachers who provide extracurricular supports nearly this much for a single program	Kristen Vandawalker	Operations B
Instructional contracts do not include related service providers for special education (occupational therapists, physical therapists). It is unclear where costs are budgeted for special education evaluations.	Carol Ann Hudgens	Operations B
Legal services look low, especially in year one.	Kathryn Mullen Upton	Operations B
How did the applicants derive the lease number? What is the fee for Prestige?	Lisa Swinson	Operations B
Fund balances in years one and five are very thin and do not leave much room should an unforeseen financial circumstance arise.	Kathryn Mullen Upton	Total Expend
First and first year surplus is minimal.	Lisa Swinson	Total Expend
There are no bus drivers in the budget, yet the school expects to purchase budget. Who will drive the buses? is the appropriate insurance included? Where are fees paid to prestige included in the budget? Has a relationship with Balboa been established? are there quotes in place to support the assertions about fitness equipment leases? What is the basis for the assertions regarding laptop and copier leases? This is certainly not the norm in IL. Has a relationship with kingsbridge been established? What about Charter School Capital. There is no explanation for the basis of caluculations on enrollment or budget breakeven. No contingency plan is present. A true contingency plan would specify elements to be reduced or eliminated. There is no evidence that a partnership with Presitge has been developed, that support is guaranteed, or that Prestige schools are successful (let alone with similar student populations).	Kristen Vandawalker	Budget Narra
The contingency plan states that in the event revenues do not meet projections, a series of reductions/elimination of non-essential costs will occur. Those non-essential costs	Kathryn Mullen Upton	Budget Narra

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are not detailed. Question for interview: what are the non-essential costs referred to in the narrative? Based on the expenditure budget, the school will not meet its 10 percent fund balance goal in years three or year five. A description of financial systems was and processes was not included.		
The fund balance for years 1 and 5 do not reflect the school's plan of having 10% in reserves.	Lisa Swinson	Budget Narra
Audit procedures were not included.	Kathryn Mullen Upton	Financial Au

Reviewer	Score
Mike McLaughlin	
Carol Ann Hudgens	
Helen Nance	
Sherry Reeves	
Joe Maimone	
Lisa Swinson	Fail
Steven Walker	
Kathryn Mullen Upton	Pass
Kristen Vandawalker	Fail
Eric Sanchez	
Tammi Sutton	

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VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-238.29B(e) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 26, 2014 5:00 pm EST deadline. Payments will be accepted in the form of a check or credit card. The Credit card Form is found on the Office of Charter Schools website. Cash is not accepted.

**Application Note: The applicant must mail the check or credit card form along with a letter indicating the name of the proposed charter school, contact information, and the enclosed payment amount to be received before or on the due date of September 26, 2014 5:00 pm EST. Failure to submit payment by the stipulated timeline to the Office of Charter Schools will deem the application incomplete.*

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

*North Carolina Department of Public Instruction
Office Of Charter Schools
6303 Mail Service Center
Raleigh, NC 27699-6303*

I understand the requirements pursuant to G.S. 115C-238.29B(e).

dparkes12

Date: 09/26/2014

Applicant Signature:

The foregoing application is submitted on behalf of Fortis Academy (*name of non-profit corporation or individuals submitting application*). The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations.

Print/Type Name: dparkes12

Board Position: Founder

Signature: _____

Date: 09/26/2014

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

Notary Public Official Seal

My commission expires: _____, 20____.

Fortis Academy - Fortis Academy endeavors to integrate the academic habits of a scholar with the devotion to physical health of an athlete thereby creating articulate, physically fit competitors who are prepared for the academic and career challenges ahead.

OVERALL ASSESSMENT

Would you as the Advisory Board deem this application complete? The decision of the Advisory Board regarding completeness is final. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total Initial Screening Votes</u>	
No	Yes
0	11 AH, JM, PG, HN, SR, AQ, ES, TS, BT, CT, SW

Would you, as an external evaluator, recommend an interview for this application? Remember that an external evaluator has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for subcommittee and Advisory Board deliberations regarding which applicants to invite back for an interview.

<u>Total External Evaluator Votes</u>	
No	Yes
3	0

Would you, as an Advisory Board, recommend this nonprofit group to the SBE to start the Planning year? The State Board of Education gives the final approval to start the Planning Year.

<u>CSAB Votes</u>	
No	Yes
8 HN, AQ, ES, TS, BT, SR, CT, SW	3 JM, PG, AH

Summary comments are to be provided in the appropriate section detailing the findings and/or concerns of the Public Charter School Advisory Council subcommittee.

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<u>Initial Screening</u>	
Mission, Purposes, and Goals	- lsswinso
Education Plan	- lsswinso
Governance and Capacity	- lsswinso
Operations	- lsswinso
Financial Plan	- lsswinso
OVERALL	- dtsmith840 - lsswinso - lsswinso

<u>External Evaluator</u>	
Mission, Purposes, and Goals	<p><u>Educational Need and Targeted Student Population</u> Appendix A provided evidences, but the small sample size does not reflect the projected number of students that could attend the school. Data for wellness is dated and not specific to the area. - lsswinso</p> <p><u>Educational Need and Targeted Student Population</u> Overall, the section is vague. Evidence regarding Davidson Countt academic achievement was not provided. No information about subgroups (race/ethnic, socio-economic, special needs) was provided, nor was information regarding health related factors for LCS. That there is significant academic need is clear from the low at/above school level percentages, however, there is no indication of how a classical program or a wellness focus would serve these particular students better than the existing LCS schools. Cited obesity statistics are five years old. Appendix A. 1. does not provide sufficient evidence of need or support. - dtsmith840</p> <p><u>Purposes of Proposed Charter School</u> Purposes explain how staff will be trained in both Classical teaching, as well as, healthy lifestyles. - lsswinso</p> <p><u>Purposes of Proposed Charter School</u> Are there any classical programs available in the LCS or DCS systems? How does improving teacher's physical wellness change the way they deliver classical instruction? No clear evidence that teachers will be able to participate in the creation of the learning program? - dtsmith840</p> <p><u>Goals for the Proposed Charter School</u> The applicant has provided wellness goals. How will wellness goals align with classical</p>

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	<p>education program? - lsswinso</p> <p><u>Goals for the Proposed Charter School</u> Goals are not addresses in SMART terms, and overall lack rigor. Goals do not indicate what students are being measured in most cases. In essence, are these all school wide averages? this may not be appropriate given serving 7 grade levels in year 1. Goals rely on end of year measures, it does not appear that internal benchmarking and monthly growth will be assessed. MAP goals are especially vague, and seems to imply that not all students will be able to make RIT growth year over year (national norm for growth is ~6 RIT points BOY to EOY, transformative growth is generally defined as >11 RIT points). Growth measures don't appear to figure in the health goals overall, but wouldn't this be easiest to track? No goals related to student or teacher attendance/retention/attrition/satisfaction. No goals related to fundraising or other financial inputs? Unclear whether the OAR will include benchmarking/trend data, how board members will be engaged with/by the data. How do these goals relate to the DPI's performance framework for charter schools? With these goals, would the school be able to achieve high ratings in the framework? - dtsmith840</p>
<p>Education Plan</p>	<p><u>Instructional Program</u> The applicant has provided information from the classical curriculum program. How will this be specifically implemented in the school? Standing classroom for all learners.. . Is there any research to support this classroom environment? - lsswinso</p> <p><u>Instructional Program</u> What are the concepts from KIPP and Great Hearts? Why KIPP? Are the targeted students similar to the population at Great Hearts school? What is the research from universities and which ones? - dtsmith840</p> <p><u>Instructional Program</u> The underpinnings of the curriculum are clear; however, the narrative does not indicate whether the curriculum is teacher-created or whether an existing program (e.g., Core Knowledge) will be used. Question for interview: what materials comprise the curricular materials? While there is a reference to data evidencing the successes of the classical approach, from the Association of Classical and Christian Schools, data is not included that supports this assertion. - dtsmith840</p> <p><u>Curriculum and Instructional Design</u> The curriculum framework provides insight on the academic side of the school's mission but evidence of how physical activity will be linked to it is not evident. Information provided is not specific. - lsswinso</p> <p><u>Curriculum and Instructional Design</u> How is a classroom resembling a "beehive" a good thing? Will students stand or move all day? is this supported by research? how will this program</p>

	<p>work for non kinesthetic learners? Will ALL students, especially those with low-incidence special needs, be well-served by this model? how will this impact discipline? The actual student-teacher ration is 1:22. Are the aides trained paras? student teachers? How do classic instruction methodologies fit with the frenetic enviroment described? Is this one large classroom with five adults and 66 kids? Will reconfiguring desks mid-class distract from time on learning? Classical education isn't really a "curriculum," no information on specific curricular materials is provided. How will students who are not athletically/physically inclined fare? Lack of specificity around instructional methodology, and no connection to how the overall program or instructional methods will connect with students and improve their learning/academic outcomes. Only five days to set up physical space? Only four days of staff development? How will the staff be ready to present classical curriculum/teach in unique space with only five days of PD? How will families react to such a short winter break? Scope and Sequence in Appendix B is wholly inadequate. Not in the format requested, vague, lacks clear outcomes. - dtsmith840</p> <p><u>Curriculum and Instructional Design</u> Need clarification on the curriculum question, above. - dtsmith840</p> <p><u>Special Programs and "At-Risk" Students</u> This section seems vague. There is no specific information provided. - lsswinso</p> <p><u>Special Programs and "At-Risk" Students</u> This section regurgitates RTI norms but does not connect them to the curriculum/instructional model/unique learning environment. No information on who will provide the interventions. Are all ESL instructors dedicated to serving LEP/ELL students? What are "EC staff"? How will one ESL teacher be able to serve students in seven grade levels? What would be the anticipated % of ELLs? What is the anticipated AIG population? what does differentiation look like? - dtsmith840</p> <p><u>Special Programs and "At-Risk" Students</u> No Tier 3 strategies were included. Question for interview: what are some examples of intensive and sustained interventions in Tier 3? - dtsmith840</p> <p><u>Exceptional Children – Identification and Records</u> Although the information follows state and federal requirements, there does not seem to be a understanding of how this will be implemented in the school. - lsswinso</p> <p><u>Exceptional Children – Identification and Records</u> When/how will before or after school support be provided given the 8:30-5pm school day? Will techers be compensated for extra hours? What if a parent is unresponsive or declines the SIT process. - dtsmith840</p> <p><u>Exceptional Children – Identification and Records</u> How will the school address referrals made by the parent? How will the school document the review of the special education record by school staff? What will the school do if there are incomplete special education records? Please describe the process in which all teachers</p>
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	<p>of students with disabilities will be informed of the requirements of the student's IEP. - dtsmith840</p> <p><u>Exceptional Children – Education Programming</u> Vague, although it does address in a limited way the physical education component of the program. - dtsmith840</p> <p><u>Exceptional Children – Education Programming</u> How will the school provide EC services for students that require a separate setting or have intensive needs? What are the plans for providing adapted PE and special transportation? In-Class collaboration with the SPED teacher is listed as an accommodation, please describe what those activities include. Will a Physical Therapist be needed for students with disabilities? Please provide more detail regarding the collaboration with the school district regarding related service providers and how those services will be provided. Please describe the process that will be utilized to develop, review and revise the IEP. Describe the adaptations and modifications that will be provided for students with physical impairments in order to access the physical components of the fitness and wellness program. - dtsmith840</p> <p><u>Student Performance Standards</u> There are no student performance goals for wellness. - lsswinso</p> <p><u>Student Performance Standards</u> How are teachers and coaches different? How often do "data meetings" occur? What types of data are reviewed? Performance standards are not differentiated from annual goals. Are additional assessments beyond state mandates used? If so, what are they? No description of data-driven program elements, how data will drive improvements to curriculum. SMART responses are not provided. Unclear what types of "classical" evaluations will be used. Section as a whole is vague. No clear promotion policies grade-to-grade are included. - dtsmith840</p> <p><u>Student Performance Standards</u> Promotion standards were included in the student handbook. - dtsmith840</p> <p><u>Student Conduct and Discipline</u> Handbook states "any eligible student who agrees to be bound by the school pledge and adhere to the school's policies will be accepted". Students can not be bound to a pledge to be enrolled. Students can not be withdrawn from the school if they do not return an Letter of Intent. - lsswinso</p> <p><u>Student Conduct and Discipline</u> How will the transition from color coding (is this the R/Y/G stoplight?) to merit-demerit system be handled? The process for expulsion is unclear, as is the appeal and hearing process. Does the appeal process happen automatically, or is the principal (or whatever the HOS is called) able to be the final decider? The language in the handbook is inconsistent. COuld this be indicative of plagiarism? School day begins at 7:45 according to handbook, not 8:30 as stated earlier in the narrative. Why 18 absences with 8 unexcused? this seems arbitrary. Why is 25 days the maximum</p>
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	<p>for waivers? Language regarding absence due to illness is contradictory. What is a "temporary cause acceptable to the principal?" This seems to give the principal a lot of leeway to push students out? Who has final determination on course credit/promotion? Page 6 indicates the board, but the rest of the policy implies the principal? Is it typical to try to identify sex offenders before allowing people into the school? what are the core values of the school? 'Excellence' is mentioned on p. 11 of the handbook, no prior mention? The division of offenses makes little sense (cheating and porn and firearms all in the same tier? - dtsmith840</p> <p><u>Student Conduct and Discipline</u> The student discipline policy is included in the handbook (Appendix D); however, it is not clear which violations trigger which consequences.</p> <p>Additionally, the handbook states that the school will make a reasonable effort to notify the parents of suspended students before the student is sent home (p. 16). This is not an appropriate approach for elementary students (especially the younger ones), who should be in the care of a parent/guardian or other authorized adult instead of left to their own devices.</p> <p>There are no details on procedural aspects of expulsion, aside from a statement that the school will follow state law. Question for interview: please describe the expulsion process. - dtsmith840</p> <p><u>Student Conduct and Discipline</u> In response #3, the description does not include references to the NC Policies Governing Students with Disabilities [NC 1504-2]. While some procedures are listed for disciplining students with disabilities, there are missing components (providing services upon the 11th day of suspension, functional behavior assessments, behavior intervention plans, etc.). If students are suspended more than 10 school days, the school has a requirement to continue to provide services. Change in placement requires prior written notice. The involvement of the IEP team is not articulated in the response. - dtsmith840</p>
<p>Governance and Capacity</p>	<p><u>Tax-Exempt Status 501 (c)(3)</u> Not included, but perhaps is pending. Question for interview: what is the status of the 501 application? - dtsmith840</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The narrative explains that the Board will evaluate the principal and delegate tasks. In the organization chart, it appears that the Fortis Academy Principal is not connected to the Board of Directors but rather other stakeholders. - lsswinso</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> Overall this section is vague and neither answers the questions asked in full nor addresses the criteria set out in the rubric. Does the board intend to develop the budget directly, or to charge the staff with developing the budget for board review and approval. What are the board's pedagogical responsibilities? What types on contracts might the board negotiate? How will the "diverse composition" of the board be set and maintained?</p>

	<p>What is the timeline for adding new members to the board? What are the areas of skill/expertise you are prioritizing? When will you add board members? what is the process for identifying and vetting these individuals? Why ten meetings per year? why is the annual meeting in May? Have current board members received any training to date? how many meetings have been held? What individuals or organizations will provide this training? Why is the PTO answering to the principal? Who are vendors working with? the principal? the "subcommittees?" Do they realize they name the trivium wrong in their info forms? The board's qualifications and experience are underwhelming. In the bylaws the board size (5-9) differs from the narrative (3-11). Does NC OMA allow virtual quorums? No committee structure is outlined. Bylaws appear to have been pieces together from various sources, and terminologies changes throughout. Board Policies were created before the AoI were filed, not sure if this matters. Additionally, if the board has not met, how can policies have been adopted? Contract approval at \$2-3k is really low threshold. Board policy manual may have been plagiarized, section on parking, grade levels, etc discuss HS grades. Board policy manual discusses admissions criteria... illegal? - dtsmith840</p> <p><u>Governance and Organizational Structure of Private Nonprofit Organization</u> The organizational chart does not include all of the staff positions that are in the personnel budget. And, it does not clearly show the to whom different positions report; rather, they all (i.e., "faculty and staff") appear to report directly to the principal. Question for interview: please discuss the rationale for the organizational structure. Why don't some positions report to the assistant principal or the business manager?</p> <p>Additionally, the chart indicates that board committees will deal with vendors and suppliers, which is unusual and puts the board in more of an operations position than a governance position.</p> <p>The narrative and bylaws provide conflicting information regarding the size of the board. The narrative states that the board will have a minimum of three members and a maximum of eleven. The bylaws call for a minimum of five and a maximum of nine.</p> <p>Criteria for evaluating the school leader and board are very general.</p> <p>Additionally, new board member training consist of one half day within 120 days of the new member's appointment. Question for interview: why the long window? - dtsmith840</p> <p><u>Proposed Management Organization (EMO/CMO)</u> NA - dtsmith840</p> <p><u>Projected Staff</u> Are they top heavy in year 1 with 5 administrators? No nurse at all the first two years, in a school with a wellness program? Unclear the level for faculty (paras/teachers, tough to judge the ratios effectively, also unclear if the specials teachers fit into that ratio? unclear if all of the instructional</p>
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	<p>positions are FTEs? - dtsmith840</p> <p><u>Staffing Plans, Hiring, and Management</u> Overall this section is so vague that it is difficult to assess. There is no actual recruitment or retention plan, and no demonstration that the applicant has any understanding of the difficulties of hiring HQT. No screening process is presented, and no concrete information on compensation is provided. No differentiation is discussed for specials teachers. Is it realistic to expect teachers to serve on board subcommittees? or as "board liasons", especially given the already long school day? To what extent is the board involved in hiring? this is typically outside the scope unless it is a board member's full time job or under special circumstances? there is no mention of candidate ability screening (sample lesson plans, teaching video, etc.) or other ways to ensure the skills of the teacher. The salaries seem very low for all levels (however, I am unfamiliar with the state norms). Job descriptions are wholly inadequate. Why does the assistant principal have all academic responsibilities as well as discipline? What does the principal actually do? Why does the principal not have to have teaching experience or school leadership experience? - dtsmith840</p> <p><u>Staffing Plans, Hiring, and Management</u> Salaries for the teachers and leadership appear low, and beyond promoting the school culture there does not appear to be a strong plan for retention. - dtsmith840</p> <p><u>Staff Evaluation and Professional Development</u> Now the leadership role names have changed (administrator v. principal). This section is incredibly vague and seems to have been plagiarized (based on a quick google search). PD plan conflicts with school calendar (2 weeks induction v. 1 in calendar). PD plan is vague and poorly structured, does not address the needs of a staff being asked to incorporate a classical education model, or discuss any type of instructional development. - dtsmith840</p> <p><u>Staff Evaluation and Professional Development</u> Professional development plans do not include strategies for working with exceptional children in the general education setting or the requirements regarding the implementation of individualized education programs. Professional development for special education and related service providers was not identified. - dtsmith840</p> <p><u>Marketing Plan</u> This section is wholly inadequate and does not inspire confidence that the applicant can recruit students in six grade levels in year 1, or adequately explain the unique program to the community or prospective students. A 25 mile radius will require significant investment in transportation and marketing materials. No specific marketing materials are named. No indication of who will carry out the recruitment/marketing? - dtsmith840</p> <p><u>Marketing Plan</u> Question for interview: please describe the targeted marketing strategy referred to in the last paragraph of the narrative. \$7,500 looks low given advertising, creation/promotion of videos, and a targeted</p>
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	<p>marketing strategy. Question for interview: please provide the rationale for the \$7,500 figure. - dtsmith840</p> <p><u>Parent and Community Involvement</u> This section is vague and does not include a clear description of how the school will communicate with parents and community or engaged them in the school. - lsswinso</p> <p><u>Parent and Community Involvement</u> The response is wholly inadequate and fails to answer the questions or address the criteria. No communication or engagement plan is present, and no volunteer activities are described. the Aforementioned PTO and subcommittees are not addressed. - dtsmith840</p> <p><u>Parent and Community Involvement</u> The parent engagement strategy described in the narrative is very, very broad, and unlikely to result in the development of strong ties between parents and the school.</p> <p>Additionally, it is deeply concerning and most unfortunate that volunteers, parents and community members are characterized as sources of free labor, monetary support or potential customers. The narrative seems much more focused on what parents can do for the school, as opposed to what the school will do for parents. - dtsmith840</p> <p><u>Admissions Policy</u> There is not an explanation for student withdrawals, re-enrollment or transfers. - lsswinso</p> <p><u>Admissions Policy</u> This section is wholly inadequate. It is unclear what the LOI is, when students may apply, and how enrollment differs from application and admission. no schedule is provided. - dtsmith840</p> <p><u>Admissions Policy</u> The lottery process was not included. Question for interview: please describe the lottery process. - dtsmith840</p> <p><u>Projected Student Enrollment (Table)</u> Why are the numbers constant in years 1 through 3 and then jump for years 4 and 5? - dtsmith840</p> <p><u>Projected Student Enrollment (Table)</u> As noted previously, the survey responses in Appendix A indicated support, but did not indicate how many individuals would be likely to enroll their child(ren) in the proposed school. - dtsmith840</p>
<p>Operations</p>	<p><u>Transportation Plan</u> Including the local school district in the plan may not be favorable if a relationship has not been established. - lsswinso</p> <p><u>Transportation Plan</u> unclear how or who will be responsible for undertaking these actions, when they will take place, or how costs were determined. Unclear what portion of carpooling or PT costs would be covered by the school. Have any other schools managed to share buses with a district? - dtsmith840</p> <p><u>Transportation Plan</u> A plan for the related service of "special transportation" for students with disabilities was</p>

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	<p>not described in the application. - dtsmith840</p> <p><u>School Lunch Plan</u> This school lunch plan is aligned with the school's mission. - lsswinso</p> <p><u>School Lunch Plan</u> Unclear who or how these plans will be carried out. Will standard FRL meals meet the requirements of the wellness program (they don't at my child's school). Is acceptance into the FTS program guaranteed or competitive. - dtsmith840</p> <p><u>School Lunch Plan</u> The narrative does not indicate how the school will provide the lunch program (e.g. in-house, contracted). Question for interview: please describe how food service will be provided. - dtsmith840</p> <p><u>Civil Liability and Insurance</u> The figure here and the figure in the expenditure budget differ slightly. - dtsmith840</p> <p><u>Facility and Facility Contingency Plan</u> \$87,000 for modular doesn't seem realistic. - lsswinso</p> <p><u>Facility and Facility Contingency Plan</u> unclear whether the applicant has spoken in detail to any of the organizations mentioned and /or where the numbers mentioned come from. unclear whether the \$/sf numbers are realistic, the basis for the numbers provided, or how they compare to other school rental amounts. No true plan to acquire a permanent, temporary, or contingency facility exists. - dtsmith840</p> <p><u>Facility and Facility Contingency Plan</u> If the school enters into an agreement with a property developer, care should be taken to ensure the terms of the lease are fair and reasonable. Contingency sites have not been identified. - dtsmith840</p>
<p>Financial Plan</p>	<p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> The numbers in the narrative don't align with the numbers in the budget. - lsswinso</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> Salaries don't seem to match the personnel section. In particular, the principal salary appears higher and the AP seems lower. Unclear whether salaries are the same for all teachers (this seems unreasonable)? Also, the salaries are only competitive for new teachers without NBCT. - dtsmith840</p> <p><u>Personnel Budget: Expenditures 2017-2021 (Table)</u> As noted previously, school leader and staff salaries appear low. - dtsmith840</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> How did the applicants derive the lease number? What is the fee for Prestige? - lsswinso</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u></p>

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	<p>Why do ffe & fitness leases drop off in years 4/5? will less equipment be needed? why are office equipment casts flat? are the "operations" and "planning year" support lines paid to prestige? what is included in these line Is this marketing budget realistic given a 25 mile attendance zone? Why is there such a steep drop off in year 2? What's the basis for facilities and related item expenditures? Are buses leased or purchased? the narrative and this budget seem to disagree. What's the basis for assuming a year/long bus lease will be only \$8k, and that drivers will be only \$9k/year? Why do textbook costs drop off after year 1 and remain flat, even though grades are being added? what type of technology is included here for classrooms? \$8.6k will only buy 34 chromebooks? What type of services and how many students can be served given these low estimates for EC and related services? What does \$3500 cover for tutoring and enrichment? it's relatively common for schools to stipen teachers who provide extracurricular supports nearly this much for a single program - dtsmith840</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Instructional contracts do not include related service providers for special education (occupational therapists, physical therapists). It is unclear where costs are budgeted for special education evaluations. - dtsmith840</p> <p><u>Operations Budget: Expenditures 2017-2021 (Table)</u> Legal services look low, especially in year one. - dtsmith840</p> <p><u>Total Expenditure Projections (Table)</u> First and first year surplus is minimal. - lsswinso</p> <p><u>Total Expenditure Projections (Table)</u> Fund balances in years one and five are very thin and do not leave much room should an unforeseen financial circumstance arise. - dtsmith840</p> <p><u>Budget Narrative</u> The fund balance for years 1 and 5 do not reflect the school's plan of having 10% in reserves. - lsswinso</p> <p><u>Budget Narrative</u> The contingency plan states that in the event revenues do not meet projections, a series of reductions/elimination of non-essential costs will occur. Those non-essential costs are not detailed. Question for interview: what are the non-essential costs referred to in the narrative?</p> <p>Based on the expenditure budget, the school will not meet its 10 percent fund balance goal in years three or year five.</p> <p>A description of financial systems was and processes was not included. - dtsmith840</p> <p><u>Budget Narrative</u> There are no bus drivers in the budget, yet the school expects to purchase budget. Who will drive the buses? is the appropriate insurance included? Where are fees paid to prestige included in the budget?</p>
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	<p>Has a relationship with Balboa been established? are there quotes in place to support the assertions about fitness equipment leases? What is the basis for the assertions regarding laptop and copier leases? This is certainly not the norm in IL. Has a relationship with kingsbridge been established? What about Charter School Capital. There is no explanation for the basis of caluculations on enrollment or budget breakeven. No contingency plan is present. A true contingency plan would specify elements to be reduced or eliminated. There is no evidence that a partnership with Presitge has been developed, that support is guaranteed, or that Prestige schools are successful (let alone with similar student populations). - dtsmith840</p> <p><u>Financial Audits</u> Audit procedures were not included. - dtsmith840</p>
OVERALL	<p><u>Cover Page</u> Verify: what will be paid to Prestige AFTER opening - dtsmith840</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> Verify: Increases 66 students per grade level added, then 22 students in years 4 and 5? What's the logic? - dtsmith840</p> <p><u>Grade Levels Served and Total Student Enrollment:</u> The survey responses in Appendix A indicated support, but did not indicate how many individuals would be likely to enroll their child(ren) in the proposed school. - dtsmith840</p>

Charter School Advisory Board Subcommittee	
Mission, Purposes, and Goals	Proposed K-8 school. The board introduced themselves. Ms. Nance asked if the board thinks that there is a need for the anticipated number of students. The board referred to the packet that was distributed.
Education Plan	Mr. Sanchez asked how the standing classroom is fleshed out and with regards to the EC population. Beehive is referring to the productivity of the students and the excitement. The medical association stated that there are results of sitting for more than 4 hours. Standing increases work and productivity. Mr. Sanchez asked what that looks like. Students would be standing but they have a stool. Mr. McLaughlin replied that it sounds really innovative. Intend to meet students with their IEPs and any accomodations for students will be implemented.
Governance and Capacity	Ms.Nance asked how the program will run and how Prestige will support the school. Some schools that are not managed do not do well in their first year. The prestige model provides training and support for three years.
Operations	Board members read from the application to explain the education plan. Ms. Nance noted that there were parts in the application that addressed high school. The handbook that was provided as a framework. The board policy manual talks about 9th grade admissions. The school will be a K-8 but high school is mentioned. The manual also talks about the Carolina School. Mr. Walker asked how can the board ensure that the documents meet up

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	<p>expectations. The direct answer is complying with any board law or federal body. The document are a draft and it will be amended once the charter is approved.</p> <p>Ms. Nance asked about the facility plans. A facility has been identified and there are some contingent locations. The board is in negotiations for the land. True North is a construction and finance company. The board chair explained that one member of the board resigned and there is a new member. Ms. Nance recalled the information on the board chairs information. She asked what strengths he had to lead a board. He brings the heart and passion and fitness background and he runs a gym. He brought Prestige and a board together. Ms. Taylor asked what the break even is for the board. Mr. Walker made a motion to allow the new board member to speak. Dr. Townsend-Smith replied that it is considered new information. The break even number is 340 students. Mr. Quigley asked about the management fee for Prestige. They are listed under two line items.</p>
Financial Plan	<p>Mr. Walker asked if there is a contingency plan if they are not to meet enrollment projections. It is a standard operations procedure in which anything that is not essential to the school. The break even is less than 34. Based on the budget there is full confidence in the numbers.</p> <p>Ms. Reeves stated that the budget is tight and there is not a lot of surplus. There is a surplus according to the board. Ms. Turner added that the surplus for year five \$1,6000. The concern is 486 year one is ambitious and your break even is 31. What are you planning to do and how you can adjust to make it still work? We are representing from Lexington and 13% margin of the market. Board members believe that the excitement is there. Ms. Sutton asked what if its not there? If you look at other charter school models most of them do not offer transportation or nutrition and there are luxuries and nonfixed costs. Different equipment leases. Ms. Sutton replied you will not know how many students you have until you have them. There is a marketing timeline.</p> <p>Ms. Taylor asked about the partnership with Healthy Start. They have provided us with guidance and support. Mr. Maimone asked if the fee is a flat fee. The fee is a per student fee. The number is diminishing and disappears in three years. The school could also decide not to participate in the retirement plan. The textbook budget has some weight in it and it can be cut. Mr. Sanchez noted that there is some concern cutting and pasting.</p>
OVERALL	<p>Mr. Walker stated that he did a Google search for one of the documents in the application and it was found. The education plan is good. Mr. Sanchez stated that he was never alleging plagiarism. He was concerned with the use of names but the theories were not embedded in the application. It seems like they need another round. Mr. McLaughlin stated that he liked the board and they have a good idea. Mr. Maimone stated they have the support to open a school. It would have been better if they had referenced the documents.</p>

Overall Summary

Initial Screening	The Office of Charter Schools deems this application complete.
10/17/2014	The CSAB voted unanimously to deem this application complete on November 14, 2014.

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<p>Application Review</p>	<p>On January 12, 2015 the CSAB subcommittee voted to move this application to interview. The subcommittee vote was 6 to 0. The full CSAB vote was 10 to 0.</p> <p>Concerns outlined consisted of the following:</p> <p>Finance, governance, and education plan. Mr. Maimone stated that he felt the clarification letter answered all question. What does Prestige do for the school? The representative from Prestige said that they support the school to make sure it makes. It trains the school. The cost of Prestige is based on head count and it decreases year by year. Prestige will leave at the end of the third year. The policy manual seems to be copied and pasted. How much was created by the board vs. how much was taken from other organizations? The board responded that everything came from public documents or statutes. It's based largely on policies from Wake, Guilford, Mecklenburg and maybe 2 more. Nothing is a perfect fit from these there is customization. Why did you choose 462 in K-6? we are serving three areas with 70% coming from Lexington City. There is no school of choice and the need is high for a school of choice. 462 students is very ambitious for the first year. There is concern that 30 fewer students is their break even number. Will people choose the school? Great Heart Program and Kipp how does that fit your school? The board responded that they are looking at leading programs for best practices. It was just a reference for best policies. Concern that this is in the application although there is no plan to use them. Extended day to help two working parents. Ms. Nance made the motion to move them forward to interview. Ms. Reeves made a second. Concern that the external evaluators had three fails with valid concerns. Somethings have been clarified others have not.</p>
<p>Application Interview</p>	<p>n February 10, 2015 the CSAB not recommend this application to the SBE to start the planning year. The full CSAB vote was 8 to 3.</p>
<p>OVERALL</p>	<p>This application will not be forwarded to the SBE to start the preliminary planning year.</p>