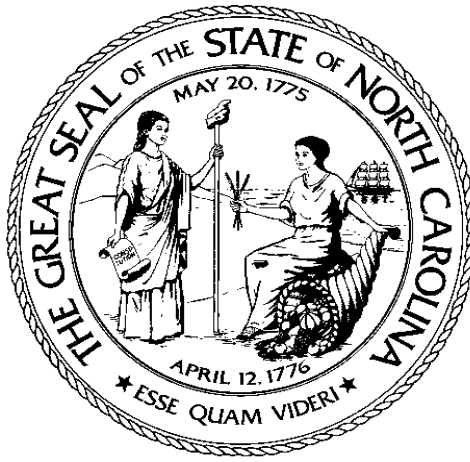




Application Preliminary Evaluation Packet

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.

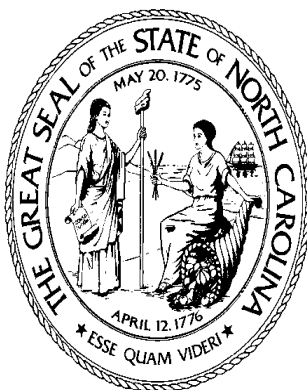
- § Pass: The response demonstrates an understanding of key issues and the ability to start a charter school successfully although minimal clarification may be needed in places. It addresses the topic with clear, specific and accurate information that reflects thorough preparation. The application meets 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:

Lindalyn Kakadelis
Joe Maimone
Jonathan Bryant
Kenneth Tucker
Amy Ruck Kagan
Alex Quigley
Tammi Sutton
Kebbler Williams
Kristen Parker
Phyllis Gibbs
Shannon Sellers
Sherry Reeves
Glenn Allen

Date of Review:

09/27/2017



NORTH CAROLINA CHARTER SCHOOL APPLICATION

Tillery Charter Academy

Public charter schools opening the fall of 2018

Due by 5:00 pm, September 19, 2016

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

OCS September 2016

CHARTER SCHOOL
2016 Application Process
To open a charter school in the 2018-2019 school year

APPLICATION DUE DATE/TIME

September 19, 2016 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 19, 2016 at 5:00 pm EST. **All applications must be submitted using the online portal** and applicants are to use the following specifications:

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

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Tillery Charter Academy - Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

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I. APPLICATION CONTACT INFORMATION

Name of proposed charter school: **Tillery Charter Academy**

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

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

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: ***Christine Fisher***

Title/Relationship to nonprofit: ***Board Chair***

Mailing address: **191 Memory Lane**
 Mt. Gilead NC 27306

Primary telephone: **704-290-6783** Alternative telephone: **704-236-1234**

E-Mail address: **chrissy.lavoie@gmail.com**

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

County: **MONTGOMERY**

LEA: **620-Montgomery County Schools**

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

No:

Yes: X

If so, provide the name of the third party person or group. **Goodall Consulting Corporation**

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.

Goodall Consulting ("GC") provided guidance, advice, resources, administrative assistance, and editing for this application. The mission, purposes, goals, and ideas expressing the board's vision contained in the application are those of the board. GC will provide guidance and assistance to the board through the evaluation and interview process and CSAB approval

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Subsequently, and until State Board of Education (SBE) approval, GC will help with marketing, including helping design and implement presentations for prospective parent meetings, designing and driving social media, assisting with public relations including press releases, continuing the development of employee policies including the head of school search, and attendance at all board meetings. Fees will be provided to GC only upon the successful opening of the charter school in 2019.

There is language and terminology that GC assisted with and which may appear in other charter school applications. That content provided by GC herein should therefore be considered original source content of this applicant.

* See the Governance and Budget Narrative sections of the application for a complete description of business services to be provided, including costs.

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

No: ☒

Yes:

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

No: ☒

Yes:

Acceleration

Yes:

No: ☒

To be considered for acceleration applicants must meet four specific criteria. Provide supporting evidences of the following:

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

Partner with a two of four year institution of higher education in North Carolina

Attach Appendix A from the four year institution of higher education in NC to demonstrate a partnership

Verify the absence of a charter school in the proposed county of location

Yes:

No: ☒

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

Yes:

No: ☒

What is the name of the nonprofit organization that governs this charter school? Tillery Charter Academy

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

Grade Levels Served and Total Student Enrollment:

Tillery Charter Academy - Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

Projected School Opening: Year 2019

Month August

Will this school operate on a year round schedule?

No: ☒

Yes:

Proposed Grade Levels Served and Total Student Enrollment (
5

Years)

Academic School Year	Grade Levels	Total Projected Student Enrollment
Year 1	K, 01, 02	144
Year 2	K, 01, 02, 03	192
Year 3	K, 01, 02, 03, 04	240
Year 4	K, 01, 02, 03, 04, 05	288
Year 5	K, 01, 02, 03, 04, 05	288

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.

arodriguez2187

Signature

arodriguez2187

Printed Name

Christine Fisher, Board Chair

Title

09/19/2017

Date

**Section I: Application Contact Information
Concerns and Additional Questions**

Reviewer

**Page
Reference**

<u>Reviewer</u>	<u>Score</u>
<u>Lindalyn Kakadelis</u>	
<u>Joe Maimone</u>	<u>Pass</u>
<u>Jonathan Bryant</u>	<u>Pass</u>
<u>Kenneth Tucker</u>	
<u>Amy Ruck Kagan</u>	<u>Pass</u>
<u>Alex Quigley</u>	<u>Pass</u>
<u>Tammi Sutton</u>	
<u>Kebbler Williams</u>	<u>Pass</u>
<u>Kristen Parker</u>	<u>Pass</u>
<u>Phyllis Gibbs</u>	
<u>Shannon Sellers</u>	<u>Pass</u>
<u>Sherry Reeves</u>	<u>Pass</u>
<u>Glenn Allen</u>	

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:

Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

Clearly describe the mission of the proposed charter school:

Tillery Charter Academy will provide a rigorous classical education by utilizing the Core Knowledge curriculum. This curriculum allows the school to set high expectations and challenging goals. The Academy also has three core values, Courage, Respect, and Spirit of Adventure that will be incorporated in the classroom and out in the community.

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.*

Tillery Charter Academy will target Montgomery County as a whole to achieve a similar racial and ethnic composition as the local school system. The board plans to achieve the following student population: 63.2% White, 18.9% African American, and 15.5% Hispanic. The board is planning to locate the school in the county's largest city, Troy. Troy is centrally located, which will allow the Academy to provide adequate transportation for all students in the county from Candor to Mt. Gilead.

Over the past four years, Troy's local school districts have not seen increases in student proficiency. Elementary school students in this LEA have no charter option and Tillery Charter Academy will offer families a much-needed choice with a challenging classical curriculum.

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

The total enrollment at the end of year five will be 288 students in grades K-5 which is 14.7% of the LEAs K-5 population. In year one, the Academy will start with 144 students in grades K-2 which is only 7.3% of the LEAs total K-5 population.

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

Tillery Charter Academy will utilize the Core Knowledge curriculum and sequence, supported by Shurley English. The Academy will also use Saxon Math. The curriculum is in great contrast to the LEA, as the Academy will have students study American History every year, along with purposeful and meaningful cross-curricular instruction. The Academy will also implement character education, as supported by the schools core values (Courage, Respect, and Spirit of Adventure).

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.*

2. Hold schools accountable for meeting measurable student achievement results:

The Academy's board will ensure that the school is meeting our goals set for each year. We will make sure that the Academy is increasing the school's proficiency rate and consistently outperforming the average of Montgomery County Elementary Schools. The board will have an Academic Committee that will include the principal to evaluate the academic success of the school on a monthly basis. The Academy will also have a School Improvement Team led by the principal. The team will consist of one teacher representative from each grade, one board member, and a minimum of two parents. The team will make recommendations to the school improvement plan and assist in ensuring the school is reaching its academic goals.

3. Provide parents and students with expanded choices in the types of educational opportunities that are available within the public school system:

Tillery Charter Academy - Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

Based on the need outlined in Appendix A and the lack of a charter school and private school options in Montgomery County, Tillery Charter Academy will provide parents with a completely new option, one not currently found in the county and the only option that would be tuition-free for all students. No other school in the county utilizes the Core Knowledge Sequence or has our three core values that guide the school.

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.*

Operational Goals:

Goal 1: The Academy will have an average attendance rate of 94% in year one, 95% in year two, and 96% in year three.

Goal 2: The Academy will meet or exceed its enrollment projections in the first five years.

Goal 3: The Academy will have less than a 10% attrition rate each year.

Financial Goals:

Goal 1: The Academy will have a cash reserve at end of year one of \$30,000 and increase that by a minimum of \$30,000 annually to achieve a reserve of \$90,000 at end of year three.

Goal 2: The Academy will make finances of the school transparent by putting the completed annual audited financial report on our website.

Goal 3: The Academy will receive an annual, unqualified audit on our financial statements and receive no financial non-compliance letters.

Academic Goals:

Goal 1: The Academy, beginning in year 2, will exceed the results of the EOG (Proficiency) results of the Montgomery County district elementary schools, exceed it by 2% points in year 3, by 4 points in year 4, and by 6 points in year 5.

Goal 2: The Academy will achieve at least a "B" rating according to the NC Accountability Model by the end of year five.

Goal 3: Students will demonstrate their understanding of the Academy's core values at the end of each year through a presentation or a project.

Governance Goals:

Goal 1: The board will meet a minimum of 10 times a year and have an 80% cumulative attendance rate or higher.

Goal 2: The Academy will maintain a five-year record of governance compliance.

Goal 3: Every board member will receive a minimum of 8 hours of group, in-person governance training each year.

Communication to the Board, Parents, Teachers, Students, and Stakeholders: The principal will prepare all academic and operational goal reports and will present to the full board a minimum of four times per year. Depending

on the specific goal, the Academic Committee or School Improvement Team may review the report and then offer recommendations, if needed. All financial reports will be prepared by the treasurer and our LINQ service provider, then presented to the Financial Committee for full evaluation and recommendations. All recommendations will be discussed and voted on by the full board. Parents, teachers, students, and stakeholders will all be notified when the reports are presented to the full board.

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

The school-wide goals have been designed to measure the pillars of the Academy's mission: a rigorous classical education and a focus on our three core values throughout the school and in the community. The board will be made aware of the school's progress toward meeting its goals through periodic reports from the School Improvement Team, monthly reports from the principal, testing and survey data, and an annual report prepared by the principal. Given all of the data available to it, the board will get a clear picture of how well the school is working towards meeting its school-wide goals which will be a reflection on how well the school is meeting its mission.

Section II: Mission and Purposes Concerns and Additional Questions	Reviewer	Page Reference
Applicant needs to clarify: What is meant by a "classical education?"	Kristen Parker	Mission Stat
The mission is based on a "classical education," but this is not further described nor detailed in the description.	Shannon Sellers	Mission Stat
Applicant needs to clarify: Why is the board seeking to have a student population as outlined in the application? Does it reflect the overall makeup of the area in which the school is located? What is the board does not achieve this racial makeup?	Kristen Parker	Educational
Applicant needs to clarify: How will using Core Knowledge and Saxon Math differ from the local LEA?		
Applicant needs to clarify: Appendix A1 shares two survey questions but what information was given to the people surveyed?		
***The applicant has not demonstrated an educational need for this school. Just because there are no other charter schools in Montgomery County, that is not sufficient evidence of a need to open a new school, especially with only 50 parents indicating interest to date. As for the performance of Montgomery County Schools...In 2016-17, there were 5 schools that contained grades 3-5. All 5 schools met or exceeded growth and all 5 schools have a School Performance Grade of C, which is equivalent to 44.2% of elementary schools across the state.	Kebbler Williams	Educational
Enrollment is large percentage of overall district	Amy Ruck Kagan	Educational
Please provide additional rationale as to why the district needs this option		
Why was the targeted student population selected? The application does not address a need for the charter school. What rationale for the charter school is there?	Shannon Sellers	Educational
Would like more information on the survey - especially exact number of responses. How many responses were received? Are respondents interested in attending any charter school or a charter school based on a classical education specifically? Is classical education desired in this community? Application does not highlight specific academic issues within the existing district - issues are only referenced in a very general way.	Jonathan Bryant	Educational
Applicant needs to clarify: How will you hold schools accountable to meeting student achievement results? What type of assessments will be used and how will you measure progress each year? This is particularly important starting out as a K-2 school, there will be no state assessment to compare results to.	Kristen Parker	Purposes of
Not sure what the applicant means by "classical education." Is there an established desire for this type of education in this area?	Jonathan Bryant	Purposes of
How will the school be held accountable for meeting measurable academic achievement?	Shannon Sellers	Purposes of
weak academic goals	Amy Ruck Kagan	Goals for th
Academic goals - clarifying point: will exceed all EOG proficiency results or only on certain tests? Academic Goal #3 - how is this measurable? If the presentation or project is completed then this goal is accomplished?	Jonathan Bryant	Goals for th
Applicant needs to clarify: How will the school monitor progress towards academic goals throughout the year? What plans are in place to adjust progress towards goals, if needs arise?	Kristen Parker	Goals for th
Applicant needs to clarify: What is meant by demonstrate understanding of the core values? How will this vary from grade level to grade level?		
why no MAP goals?	Joe Maimone	Goals for th

Tillery Charter Academy - Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

Reviewer	Score
Lindalyn Kakadelis	
Joe Maimone	Pass
Jonathan Bryant	Fail
Kenneth Tucker	
Amy Ruck Kagan	Pass
Alex Quigley	
Glenn Allen	
Tammi Sutton	
Sherry Reeves	Pass
Shannon Sellers	Pass
Phyllis Gibbs	
Kristen Parker	Fail
Kebbler Williams	Pass

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.

The Academy is committed to meeting the needs of every student in the county and surrounding areas. The Academy's instructional program will be anchored by the Core Knowledge sequence, a classical-like approach to education. The Core Knowledge sequence is a detailed outline of specific content, aligned with the North Carolina State Standards. By offering a challenging approach to education, our targeted demographic will be able to spend time building that bank of knowledge and receiving the help they need along the way. The cross-curricular pedagogy with content alignment across disciplines brings strength to the curriculum.

The School will support the Core Knowledge sequence with the Core Knowledge Language Arts Program, Core Knowledge Science, Core Knowledge History and Geography, Core Knowledge Visual Arts, Core Knowledge Music, Saxon Math, and Physical Education.

The School will support its English Language Learners through Shurley English's "Stepping Stones to English." This four-phase ELL supplement will complement the Core Knowledge Language Arts.

The Academy's board has chosen to use Core Knowledge's Language Arts Program. There is a specific K-3 curriculum and a 4-5 curriculum. The K-3 Language Arts Program is broken up into two strands, the Skills Strand and the Listening & Learning Strand. The Skills Strand has students learning, reading and writing together, building language skills, and being able to translate that onto paper through spelling (spelling words). The Listening & Learning Strand focuses on comprehension. While students are learning how to read and spell, the Listening & Learning Strand allows students to understand the meaning of these words. The 4-5 curriculum focuses on the mastery of the skills learned in grades K-3. The Academy will use DIBELS to assess student progress. Core Knowledge History and Geography is pulled from the Core Knowledge Foundation and aligns perfectly with the sequence. The Academy will also use the Core Knowledge Science curriculum which provides direct alignment and cross-curricular opportunities.

The Academy has chosen to use Saxon Math (recommended by the Core Knowledge Foundation). Saxon Math continually reinforces previously mastered concepts. There is a reduction in knowledge gaps through the spiraling of instruction, as students are continually using previous knowledge to master new concepts.

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The Academy has three core values, Courage, Respect, and Spirit of Adventure, which students will learn about at monthly school-wide seminars. Through the seminars, students will see what living out these values looks like both in school and out in the community. Teachers and students will be expected to exemplify these three core values both inside and outside the classroom. The Academy will seek out parents, community leaders, and business owners to help the school live out these values.

Courage: To speak up for what is right and just.

Respect: To respect your fellow citizen.

Spirit of Adventure: Take the knowledge you have gained and be an innovator.

Teachers will be able to use a variety of methodologies, allowing them to use best practices and teach with confidence. Using a wide range of teaching techniques will help reach each student in the way that he or she learns best. Teaching methods that the teachers may use include but are not limited to direct instruction, experiential learning, collaborative learning, and directed independent study.

To aid in the evaluation of student performance and competencies, we will administer the Northwest Evaluation Association (NWEA) Measures of Academic Progress (MAP) two or three times per year for students in grades 2-5. These interim assessment results will be used by teachers to drive instruction, effectively addressing student needs. For grades K-1, we will administer the NWEA MAP for primary grades. The Academy will also administer the required End-of-Grade tests.

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.

Tillery Charter Academy's learning environment will be traditional, in keeping with its classical approach. Students in K-5 will be taught in self-contained classrooms with one teacher per class. Each grade will have two 24 student classrooms, each with a core content teacher. In the first year, kindergarten will have two teacher assistants while the remaining grades will have a floating teacher assistant.

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.*

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The Core Knowledge sequence and the curricula that supports the sequence aligns with North Carolina's State Standards. The Core Knowledge Language Arts Program meets all the foundational reading skills standards set by the state. The Language Arts curriculum (as mentioned above) provides tools that stretch across North Carolina's standards in getting students to understand text, structure sentences, and being able to compare and contrast (just a few examples).

Saxon Math is aligned with the Core Knowledge Sequence, as well as North Carolina's State Standards. From kindergarteners learning about shapes, to fifth graders diving into fractions, Saxon Math provides a rigorous approach where students build upon the concepts learned. This aligns with the proposed mission by providing a rigorous classical education.

The Core Knowledge sequence aligns with our targeted student population, as shown through other major successes in similar communities. In 2004, the University of Illinois conducted a survey in North Carolina examining ten schools with various school populations (including two that were similar to Tillery Charter Academics target population.) The study concluded that eight of the ten schools outperformed similar district schools on the End-Of-Grade tests. Both of the schools with similar populations to Tillery's target population were in the eight that outperformed the other district schools.

The Academy will incorporate three core values into the school, Courage, Respect, and Spirit of Adventure, encouraging students and teachers to exemplify these values inside and outside of the classroom.

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.*

While the content and sequence of Core Knowledge is regimented, it lends itself to a wide variety of instructional methodologies that allow teachers the freedom to use the method that best reaches each student. Tillery teachers will use a variety of instructional strategies including but not limited to: direct instruction, Socratic method, collaborative learning, and directed independent study. Teachers will also receive training in classroom differentiation and best practices for remediating students who are struggling. Core Knowledge provides resources for teachers to help them address the needs of students with a wide range of differences and abilities.

Teachers will also receive extensive professional development in instructional methods, allowing them to adjust their lesson plans and instruction to ensure each student's success. Specifically, Core Knowledge Language Arts now offers an online guide for at-risk students, how to approach different parts of the sequence.

These trainings will help teachers deliver a more effective product in the classroom, leading to greater academic growth. The Core Knowledge trainings/professional development is proven and provides the tools teachers need to work with struggling students. The 2004 Walberg Study conducted in ten North Carolina schools showed that the professional development provided to educators led to a significant increase in End-Of-Grade test scores.

5. *Explain how the proposed instructional plan and graduation requirements will ensure student*

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readiness to transition from grade to grade and to the next grade span upon program completion.

Tillery Charter Academy will use multiple strategies to ensure that each student will be prepared to transition to the next grade level.

1. A comprehensive, coherent curriculum will be used with fidelity, along with common planning in PLCs and common assessments across the grade levels. While students will still have a wide range of abilities and competencies, they will arrive at the next grade level having been exposed to the same material, giving teachers a more complete picture of what the students already know at the beginning of the year.

2. A multitude of assessment strategies will be used to gauge student learning and adjust instruction throughout the course of the year. Students will be given the NWEA MAP two or three times per year; teachers will use frequent formative assessments throughout lessons to inform instruction; and grade level teams will plan together and use common assessments, analyzing data in PLCs, to improve instruction and student learning.

3. Strategies will be in place to identify and remediate students who are struggling. Teachers will provide individualized tutoring at specified times before and after school. Parent volunteers will be used to encourage and help students by providing classroom assistance during group or center time. Students who are identified as at risk for academic failure will have a Personalized Education Plan (PEP.)

4. Students who need more extensive help will be referred to the School Support Team by teachers, parents, or other staff. The SST will work with each referred family to get help for each student in order to reach his or her potential through classroom interventions, alternate instructional strategies, referral to contracted specialists, or referral to the Exceptional Children team.

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.*

The calendar allows teachers to complete the Core Knowledge Sequence, Saxon Math, and Shurley English in the days and hours provided. The calendar also provides students time to get out into the community and live out the core values of the Academy.

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.*

Tillery Charter Academy will employ a Multi-Tiered System of Support. This model is intended to address the academic needs of students by prevention and early intervention, providing those struggling students with the support

needed to meet standards. When students are identified as not making sufficient or satisfactory progress (classroom assessments, progress monitoring or interim assessments), the MTSS model provides targeted interventions.

Tier 1: All students receive high quality, researched-based core instruction. This core curriculum provides the foundation for instruction upon which all interventions are formulated and aligned. Students should meet grade level standards in Tier 1 instruction. If a review of data shows that 80% of students are not meeting grade level standards and would require Tier 2 or Tier 3 interventions, then instructional modifications must be made at Tier 1. Students who are not progressing in core level instruction and appear to be at risk should continue to receive strong core instruction and additional Tier 2 interventions.

Tier 2: Tier 2 interventions are provided to those students who are not meeting/achieving grade level standards through core instruction alone. These interventions are provided in addition to core instruction and occur outside the CI block. For example, an additional 30 minutes can be allocated for supplemental tier 2 interventions outside the 90 minute reading block. Tier 2 interventions are provided to small groups of students. Ongoing progress monitoring involves reviewing data at both Tier 1 and 2 levels. Ongoing progress monitoring should occur more frequently at a Tier 2 level (at least every 20 days). Data gathered should be used to determine whether interventions are proving effective and to determine whether any changes need to be made. Should a student continue to not meet expectations despite Tier 1 core instruction and Tier 2 additional support being implemented and monitored with fidelity, student may require Tier 3 intensive interventions.

Tier 3: Tier 3 interventions are intensive and are intended for a small percentage of students who are not responding positively to generally effective Tier 2 interventions (effective being defined as 70% of students receiving Tier 2 interventions are meeting or exceeding grade level expectations.) Tier 3 interventions are designed to meet individual student needs by providing instruction that is explicit and intense. These interventions are designed to meet student needs by targeting areas of deficiency. Prior to beginning Tier 3 additional targeted assessments may be required in an effort to isolate deficits and guide intervention design. The intensity of these interventions is defined by frequency, duration and group size (never to exceed 3 students.)

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.*

A Home Language Survey will be completed for each student upon enrollment. Should the HLS identify a student to be a language minority, the NCDPI ESL HLS Process will be followed (see Appendix 0.)

The first phase introduces the Shurley Method (being used through Shurley

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English) in the student's first language. By introducing the student to the Shurley Method in their first language, a student can grasp the instruction.

The second phase introduces a bilingual approach, where English is being eased into the student's vocabulary via the Shurley Method. Phase three is an intensive transition to English and phase four, the student is fully emerged in English, still receiving assistance when needed by the ELL teacher.

Through these phases, the student will be pulled out of class only when needed. The ELL instructor will be able to assist the student in class along with the lesson.

Some students may enter the program at different phases depending on their proficiency. The Shurley Method utilizes spiraled instruction, constantly reinforcing grammar skills, which aligns with the Core Knowledge Language Arts and Shurley English. The ELL teacher will progress monitor students using the formative ongoing assessments provided in the Stepping Stones to English.

Classroom teachers will provide additional support through the implementation of a variety of instructional strategies for ELL students.

Strategies include:

- Incorporation of visuals
- Actively teach vocabulary (including charade games, visuals, word walls etc.)
- Use Rubrics (allowing students to understand all components of what a "good" assignment looks like)
- Developing a classroom library with leveled readers, allowing ELL students to select books that suit their skill level.
- Modeling for students. Modeling a "thinking aloud" process allows ELL students to witness how to problem solve or complete an assignment.
- Using Structured Discussions, encouraging students to participate in academic conversations.
- Using organizers and frames, allowing ELL students to organize information and structure content.

Once identified as ELL, students will be assessed annually using ACCESS ELLs until meeting exit criteria.

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.*

The Academy's curriculum is challenging and carefully designed to provide students with a solid foundation of knowledge and skills necessary for future success. Though the rigorous instruction will adequately meet the needs of many gifted students, should students need a greater challenge, teachers will have the knowledge and flexibility to differentiate

instruction to meet the needs of those students. Because the content and sequence of the Core Knowledge sequence is so important, even students who may be performing high above grade level will not be allowed to miss content. Instead, teachers will design lessons and assignments so that intellectually gifted students can be challenged while benefiting from the shared knowledge and experience of their peers.

Strategies such as supplemental reading materials, challenge spelling words, individualized reading goals, and engaging projects will help students achieve academic growth no matter what level they are on. The spiraling nature of the Saxon Math program makes it well suited for acceleration. Starting in 3rd grade, high achieving students will have the opportunity to accelerate their math and advance to the next grade level. This opportunity will ensure that the most gifted math students are challenged, without sacrificing a firm foundation of math skills. All students' progress will be assessed and monitored using a variety of methods, including the NWEA MAP, NC EOGs, and grade level common assessments.

The teachers and principal will be held accountable for the growth and success of each student, and the School Improvement Team and the Board of Directors will continuously monitor the growth and achievement of different groups of students, including high performing 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)*

As part of the enrollment packet that every student will be required to complete, parents will have the opportunity to provide confirmation about their child's existing IEP or 504 plan. Additionally, EC staff will examine all records from previous schools as they are received to determine if enrolled students have existing IEPs or 504 plans. Upon identification of students with existing IEPs or 504 plans, school staff will alert the EC Director, teachers, and administrators to ensure compliance with any existing plans.

To help identify students who may be eligible for special education services, a School Support Team (SST) will be established. The SST will be made up of teachers and a representative from our contracted EC services. Students may be referred to the SST by administrators, teachers, or parents. Once referred, the SST will make a preliminary evaluation and, with the support and agreement of the parents, make recommendations for either research-based classroom interventions or further formal evaluation. The formal evaluations may be conducted by EC staff or qualified personnel contracted for such purposes. If classroom interventions put into place are found ineffective, the SST will re-evaluate and either put new interventions into place or determine if the student's needs will be best served by an IEP or other special education services.

At all stages of the process the student's parents will be informed and consulted. The SST will continue to monitor all students determined to have special needs or need special assistance until such time as they are determined to no longer need special services. All student records will be maintained with confidentiality and safety in mind. Records will be kept in secure, designated, locked records rooms, in fireproof file cabinets. Student records may be examined on site only by approved personnel and should never be taken off site. A staff member will be designated by the principal to oversee the student records and ensure compliance with all applicable laws. Records will be requested from the student's previous school only after a complete enrollment packet has been received. Upon receipt, student records will be securely stored and treated with strict confidentiality.

Exceptional Children's Education Programming

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

The Academy is committed to meeting the needs of all enrolled students. It will be our policy that every child have a fair and full opportunity to reach his or her full potential and that no child shall be excluded from appropriate educational offerings. To ensure that the needs of exceptional children are met, the School will have an Exceptional Children Department staffed with licensed, highly qualified, well-trained EC teachers. The EC department will be tasked with the screening of all students referred by the School Support Team (SST.) The EC department will further be responsible for developing educational plans and strategies for special needs students.

The EC department will take every reasonable measure to prevent denials of equal educational opportunity on the basis of physical, emotional, or mental handicap; and will assure that the rights of students with special needs and their parents or guardians are protected. The staff of the School will be aware of students with an Individual Education Program (IEP) or a Section 504 Plan and make sure that all requirements are being met as prescribed. The IEP will be updated regularly and adjustments will be made to

accommodate each student. An EC teacher, classroom teacher, parent, and administrator will be given proper notification and invited to attend all meetings. There will be ongoing assessments in classrooms to identify students with special needs.

Students with a Section 504 Plan or identified as being eligible for a 504 plan will be offered accommodations and or services for the identified disability. Accommodations and services for both IEP and 504 plans will include but not be limited to: modification of tests and assignments, supplemental textbooks, adjusted seating, use of study guides and organizational tools, preferential seating, modified recess and PE, and use of necessary health care procedures.

The Academy plans to contract for related services such as speech-language, occupational therapy, and physical therapy with a company that has a proven track record and extensive experience with providing EC services to charter schools.

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.*

Goal: The Academy, beginning in year 2, will exceed the results of the EOG (Proficiency) results of the Montgomery County district elementary schools, exceed it by 2% points in year 3, by 4 points in year 4, and by 6 points in year 5.

The Academy will attain this goal through the NWEA MAP testing two to three times a year, grades 2-5 and ensuring progress through a report three times a year to the Academic Committee from the principal. We will also be measuring fluency through DIBELS to ensure that students are able to take these tests with confidence. The principal will also share the progress with the School Improvement Team. The Academic Committee and the School Improvement Team will then have the opportunity to make any recommendations to the full board on improvements. Once the board is notified, the Academy will notify parents and students on the results in relation to our goal. Teachers will use individual student data from the NWEA tests to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their Professional Learning Communities (PLCs) to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT will use school-wide testing results to make recommendations to the board about school-wide initiatives and programs designed to address deficiencies.

Goal: The Academy will achieve at least a "B" rating according to the NC

Accountability Model by the end of year five.

This goal will be measured by the End-of-Grade assessment required by the state of North Carolina once a year. The metrics that the Academy will use to attain this goal is the NWEA MAP testing for reading and math (two to three times a year). We will also be measuring fluency through DIBELS to ensure that students are able to take these tests with confidence. The principal, with the assistance of the Office Manager will report the results of the NWEA testing to the board's Academic Committee three times a year. The board will then notify parents of their own child/children's results and the Academy's progress as a whole. The Principal will report the results of the End-of-Grade assessment to the full board. Once the board is notified, the Academy will notify parents and students on the results in relation to our goal. Teachers will use individual student data from the NWEA and DIBELS tests to modify strategies and adjust instruction to meet the needs of the students in his or her class. Teachers will use grade level data in their Professional Learning Communities (PLCs) to adjust lesson plans and instruction based on the needs of the students in each grade. The SIT will use school-wide testing results to make recommendations to the board about school-wide initiatives and programs designed to address deficiencies.

Policies and Standards for Promoting Students:

Students who meet or exceed the state standard requirements, where they exist, and have met all of the grade level requirements will automatically be promoted to the next grade. Third grade students must meet the state reading requirements and End-of-Grade assessments. If a student is at risk of being retained, the student's classroom teacher will contact the parents as soon as possible. The teacher, parents, and other necessary staff will formulate a personal education plan which may include a referral to the SST. It will be the policy of the Academy to give each student the tools and support that he or she needs to be successful. If the interventions and support do not result in the student meeting the requirements to be promoted to the next grade, the principal, with input from the teacher, parent, and other involved staff, will make the final decision on whether or not to retain the student.

If a student has either an IEP or a 504 plan, the decision to retain or promote that student will be made with the support of the EC staff and consideration will be given to the student's plan and accommodations. All of the school policies and procedures, including promotion and retention policies, will be available to parents and students in the student handbook and on the school website.

Exit standards will be based off the Academy's promotion standards. In addition to meeting those requirements, students should pass to End-of-Grade assessment and meet all attendance requirements. Students who are at-risk will receive accommodations allowed lined out in their personal education plan.

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.*

It is the goal of Tillery Charter Academy to provide a safe and orderly environment for students, parents, and staff. To this end, we will set high behavior expectations for each student. Teachers will formulate, communicate, and model clear behavior expectations based on the idea that everyone should show kindness and respect. School-wide behavior expectations will be displayed throughout the school, discussed during assemblies, and consistently enforced. The disciplinary process will consist of four levels:

Level 1: Most instances of misbehavior can be addressed by the classroom teacher and every teacher will receive training in classroom management and strategies to address inappropriate or disruptive behavior. Teachers will keep parents informed if their student's behavior is not meeting expectations. If misbehavior persists or rises to a Level 2 offense, then the classroom teacher will refer the student to the administration. Examples of Level 1 behavior include, but are not limited to talking out of turn, refusal to participate, not cleaning up after making a mess.

Level 2: Repeated Level 1 behaviors or more serious misbehavior will result in a referral to the principal. The principal will meet with the student and parents to formulate a corrective action plan that may include disciplinary measures. Possible consequences of a Level 2 offense include but are not limited to after school detention, in-school suspension, writing reflections, and suspension from extra-curricular activities. Examples of Level 2 offenses include leaving class without permission, disrespect of authority, and non-compliance with dress code.

Level 3: If Level 2 misbehavior persists in spite of the corrective action plan or are more serious, the principal will meet with the student and the parents and formulate a corrective action plan that may include an out of school suspension of no more than 10 days. Examples of Level 4 offenses include disobeying school personnel, cheating, stealing, harassing others, and destruction of school property.

Level 4: If corrective action plans do not result in adjusted behavior, or if the misbehavior rises to a Level 4 offense, the principal will meet with the student and the parents and may recommend long term suspension or expulsion. Examples of Level 4 offenses are possession of drugs, threats to others, possessions of weapons, and assault. A parent may appeal a Level 3 or Level 4 disciplinary action by submitting a written notice of appeal to the principal within 24 hours of being notified of the action. The principal will immediately notify the Board of Directors who will schedule a meeting to hear the appeal. The parents will be notified of the date, time, and

place of the meeting and requested to attend. The decision of the Board regarding appeals of disciplinary measures will be final. When considering discipline of students with special needs, the principal, with the help and consultation of the EC teacher, will review the student's file including his or her IEP or 504 plan. The principal will take into account any accommodations or interventions in place and whether or not the misbehavior is a manifestation of the student's disability, and work with the parents to ensure that all of the student's rights are protected.

Section III: Education Plan Concerns and Additional Questions

Unsure that using a specific curriculum will lead to improved results, this section needs more detail.	Jonathan Bryant	Instructiona
This reads as overly abbreviated and demonstrates little understanding of the actual program Provide detail, rationale, data that shows the validity and success of the program. Provide information that details how the program changes over the grade levels. Provide information about how all learners can access the program.	Amy Ruck Kagan	Instructiona
How does this program align with the mission of a classical education? You state that is "classical-like." What documentation exist that core knowledge leads to improved student performance?	Shannon Sellers	Instructiona
***The applicant did not provide a clear and coherent description of the instructional methods. ***The applicant did not provide documented evidence that the proposed approach will lead to improved student performance for its targeted population.	Kebbler Williams	Instructiona
Weak section Calendar appears very traditional and narrative does not provide any detail	Amy Ruck Kagan	Curriculum a
***Has the applicant constructed its calendar based on the following definition of instructional time: "Instructional time is that time during which students are assigned to a teacher for the primary purpose of instruction. Instruction is any activity that leads toward the mastery of specific educational goals as stated in the North Carolina Standard Course of Study and local guides. Though definitely a part of school life, some activities, such as the following, are not considered to be part of instructional time: changing classes, homeroom, lunch, pep rallies, and school dances."	Kebbler Williams	Curriculum a
Is there any concern with 24 person kindergarten classes? - this is significantly higher than traditional LEAs typically. Why is MAP not administered a set number of times? Student readiness from grade to grade is somewhat vague.	Jonathan Bryant	Curriculum a
***What is the applicant's plan to find personnel who speak each English Language Learner's first language to implement the first and second part of the Shurley Method? ***What is the applicant's plan to exit students from ESL services? ***How is the plan for gifted students different from what should be done for all students?	Kebbler Williams	Special Prog
How will students be exited from the ELL program? Are you aware of the ACCESS and WIDA test? How will these test be used?	Shannon Sellers	Special Prog
Applicant needs to clarify: Who will be tasked with providing interventions to students? Will it be the primary teacher or will there be other designated staff members? Applicant needs to clarify: How will students be grouped into the different phases for ELL services in relation to the Shurley Method? Will all students entering at Kindergarten start at the Phase 1? How will you strategically identify where students are and where the best for for them will be? Applicant needs to clarify: What is the specific process that the school will go through to identify academically gifted students?	Kristen Parker	Special Prog
Unclear how this meets the needs of gifted students.	Jonathan Bryant	Special Prog
What is your process for requesting records and follow up? What is your specific child find process if you receive a referral from a parent, teacher, or outside source?	Glenn Allen	Exceptional
***How will the applicant use Child Find?	Kebbler Williams	Exceptional
how is enrollment defined here in relation to legality and IEP/504 designation? How is this information tied to the Tiered Support system? Is money budgeted for EC services/contracts?	Amy Ruck Kagan	Exceptional
You discuss multiple accommodations and modifications. How do you plan to deliver Specialized instruction? Are there any specific interventions or strategies that will be employed and progress monitored?	Glenn Allen	Exceptional

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***How will the applicant ensure that the full continuum of EC services are offered at this school? ***How will IEPs be monitored? ***How does the educational plan for serving Exceptional Children align with the overall proposed curriculum, instructional methods, and the school's mission?	Kebbler Williams	Exceptional
Very low academic goals Office Manager qualifications in order to be helping with data analysis? More detail about School Improvement Team	Amy Ruck Kagan	Student Perf
Promotion standards seem vague.	Jonathan Bryant	Student Perf
The policy for promotion/retention is vague. What are the standards for promotion and retention? What will be considered progress on NWEA Map testing?	Shannon Sellers	Student Perf
Applicant needs to clarify: Will students receive report cards? How will quarterly progress towards proficiency be measured aside from NWEA testing? Applicant needs to clarify: What specific goals will the school have around student proficiency for NWEA testing? Are students expected to be on grade level after each assessment? Will there be a growth goal for every student? Applicant needs to clarify: What specific steps will teachers take when analyzing student data? The application outlines- modifying strategies, but what does that specifically mean?	Kristen Parker	Student Perf
***Why is the board responsible for notifying parents of their children's test results? ***The applicant did not specify clear policies and standards for promotion from one grade level to the next nor exit standards for ALL students.	Kebbler Williams	Student Perf
How will the core values stated in the mission be seen in student conduct?	Shannon Sellers	Student Cond
It should be noted that you will provide services to students with disabilities even when there is a change of placement or it the team determines that the behavior is not a manifestation of the disability.	Glenn Allen	Student Cond
Applicant needs to clarify: Will discipline methods be the same for all grade levels? How will you account for the difference in age and behavior for Kindergarten and 5th grade? Applicant needs to clarify: How will the core values outlined earlier in the application play a role in student conduct?	Kristen Parker	Student Cond

Reviewer	Score
Alex Quigley	
Amy Ruck Kagan	Pass
Kenneth Tucker	
Jonathan Bryant	Pass
Joe Maimone	Pass
Lindalyn Kakadelis	
Tammi Sutton	
Shannon Sellers	Pass
Phyllis Gibbs	
Kristen Parker	Fail
Kebbler Williams	Pass
Glenn Allen	
Sherry Reeves	Pass

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: Tillery Charter Academy

Mailing Address: 191 Memory Lane

City/State/Zip: Mt. Gilead NC 27306

Street Address: 191 Memory Lane

Phone: 704-290-6783

Fax: 704-846-5098

Name of registered agent and address: Dianna S. Lariviere
320 Zion Church Rd.
Mt. Gilead, NC 27306

FEDERAL TAX ID: 82-2685983

Tax-Exempt Status 501 (c)(3)

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

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

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

Governance and Organizational Structure of 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 professional licenses?

Christi ne Fisher	Chair	MONTGOMERY	Homemaker		
Dianna Larivie re	Vice Chair	MONTGOMERY	Paralegal		
Stacey Bruton	Treasu rer	MONTGOMERY	Pharmacist		
Catheri ne Byrd	Secret ary	DAVIDSON	Exceptiona l Children Teacher		
Rhonda Dilling ham	Member	RANDOLPH	Executive Director Charter Associatio n		

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.*

Governance of the school is the direct responsibility of the Tillery Charter Academy Board of Directors, whose paramount goal is the educational success of its students. The Board will ultimately be responsible for all transactions of the charter school including financial management, personnel, academic program, and facilities. The Board will be composed of 5 to 13 members, with a goal of at least one Board member being a parent or guardian of an Academy student.

The Academy Board will provide direction via policies to the principal who will be responsible for the day to day operation of the school. The Board will form work committees which, in cooperation with the administration, will set policies and develop programs and procedures that are in line with the school's mission and designed to meet the school-wide performance goals.

Each Board member will be expected to fully participate in the governance of the Academy. Each board member will sign a conflict of interest statement and a board commitment statement. Each board member will support the school by serving on at least one board committee, participating in school events and activities, and reviewing board materials. They will receive formal training regarding North Carolina charter related statutes, the Open Meetings law, State Board policies, and Office of Charter School directives, while acting in the best interest of the students and the school.

The personnel committee will be tasked with conducting an exhaustive search for the school principal. The job opening will be posted for a minimum of 30 days on such websites as the National Association of Secondary Schools, K12 Job Spot, Ed Week, School Spring, and college and university placement centers. We will also use the "NC School Jobs" new software available to charter schools for the first time in 2017. The committee will look for a candidate who, above all, will share the mission and the vision for the Academy. The personnel committee will also develop an evaluation process for the principal and submit to the full board for approval. Once the Board

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formally hires a principal, the board will evaluate the principal annually using the evaluation tools and processes that have been adopted by the board.

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

The board of the Academy will be comprised of 5 to 13 members. There are currently 5 members but we have two more coming on board within a few days. After enrollment starts, a parent should be added to the board to support the parental partnership that is a critical piece of the Academy mission. Each board member has knowledge and experience that will be beneficial to the governance and long-term success of the school. The founding board includes community members with expertise in charter and district school education, business, finance, accounting, human resource management, governance, fundraising and marketing. The board members have a devotion to the mission, and a common vision for Tillery Charter Academy.

Our board includes Rhonda Dillingham, the Executive Director of the NC Association for Public Charter Schools, a co-founder and Curriculum Director of Uwharrie Charter, and an 18-year classroom teacher. Her influence among and knowledge of the NC charter community, brings leadership to our board and provides expanded relationship development as well as the practical hands on experience of one who has started a charter school.

Our chair and vice chair, Christine (Chrissy) Francis and Dianna Lariviere, are mothers of children who will attend our school. Their investment in evaluating the academic outcomes of the Montgomery County public schools led them to partner with each other in a commitment to do something about the sagging test scores and possible implications for their own children. Chrissy is a homemaker and active in the community. Dianna is a paralegal equally devoted to her community. Both have been instrumental in the development of our application, by describing and manifesting their vision, and actively promoting the prospective school by driving social media, addressing the board of county commissioners and holding community interest meetings.

Stacey Bruton, our Treasurer, is a licensed and practicing pharmacist. Earlier in her career she was a self-employed business owner who managed the accounting and human resource functions of four NAPA Auto Parts stores. We believe her practical business background will augment the educational experience of our board.

Catherine Byrd, our Secretary, is a certified Exceptional Children teacher who may have interest in ultimately working at the school, which hopefully would translate to a continuity of the mission and vision of the founders in the practical application of her work within the school.

To ensure the academic and operational success of the school, the board will work together to make organizational and policy decisions. The board will be ultimately responsible for all operations of the charter school, but will

delegate the day to day operations to the principal. To ensure that the best possible decisions are made, the board will participate in continuing board development and use proven best practices. The board will gather information from a variety of sources including the School Improvement Team, the Parent Teacher Organization, the administration, and surveys of parents, students, and staff. The board will get regular reports from the principal and the board committee that will keep them informed about all areas of school performance and will be used to help them make decisions.

The board is fully determined to achieve the school's governance goals of excellent attendance at board meetings, SBE governance compliance, and annual in-person and group continuing education in best governance practices.

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?*

Dianna Lariviere and Chrissy Fisher met two years ago at a function and discussed their upcoming entry into the public school system and immediately shared a mutual interest in their desire for quality. They then learned that no charter options existed close by and researched charter schools in surrounding counties. They found Anson Charter Academy had applied and Lariviere worked in Wadesboro, but still the drive would be too long for Chrissy Fisher. They opted to explore opening their own charter in the Mt. Gilead area of Montgomery County. Fisher called Eddie Goodall, the then chair of Anson Charter Academy and a series of conversations and meetings followed, at the end of which the two women decided to develop a board of directors and file an application for their county. Goodall Consulting would be hired to provide the application assistance, the subsequent planning year help, and the business services function after the school opening.

Goodall suggested Fisher invite Rhonda Dillingham of the charter association to come speak at a community reception to introduce the charter because he could not attend. She did speak there and was shortly thereafter asked to consider becoming a board member because of her extensive charter practical experience, starting a charter (Uwharrie), as well as the breadth of her knowledge of the state's charter community. Another attendee that evening, the owner of a Troy coffee shop, referred some names to be considered for board membership and from those arose Catherine Byrd and Stacey Bruton. As we stated earlier, there are at least two prospects being considered to increase the board to seven members.

If a new board member is to be added, by vacancy or by annual term expiration, the bylaws call for an affirmative vote of 60% of the board at a duly held meeting. After a nominating vote, any prospective member would receive the conflict of interest policy, the bylaws, Open Meeting and Public Record laws, the charter statutes, SBE policies, the charter contract, and a summary of the fiduciary duties of a not for profit board member to thoroughly review. A candidate would be interviewed by the full board at a meeting, as a discussion item on the agenda, and action only taken at a second board meeting. We believe the determination of board members affects many more than just the other board members and a fiduciary duty of incumbent members includes prudent stewardship of the board positions and officer selection.

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

The board will meet monthly, ten months per year. The annual planning meeting will be in each June before the opening of school.

The board will meet at least monthly until the application is approved and then would likely meet semi-monthly during the planning year and RTO process.

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.*

New board members will be required to participate in the board's Orientation Plan. Key points of the plan include a primer on the charter contract, charter law, SBE CHTR policies, open meetings law, and public records law; attending at least one school community event; and observing in a classroom. Board members will be expected to participate in ongoing board development. The board may use a combination of training provided by the Office of Charter Schools, the NCAPCS, books, professional development coaches, and annual board retreats. A specific requirement for hours of board development for each board member will be laid out and agreed to in the Board Commitment Letter that each board member will sign.

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.*

Tillery Charter Academy board members have a fiduciary responsibility to the school. They avoid or disclose conflicts of interest, and act in an ethical manner that credits the board, the school, and the staff. Each board member will be required to sign a conflict of interest statement and annually disclose any conflicts or potential conflicts of interest.

When a conflict of interest occurs or may even appear to occur, the affected board member should advise the board before any vote or even discussion of the issue. Also, other board members have the obligation to bring before the board any potential conflicts even if the issue involves another board member. If, in the board's opinion a conflict exists, then the member affected shall not participate in any discussion or vote on the matter in question.

We define a conflict of interest as a condition that exists when circumstances create, or are perceived to create, a risk that judgment or actions by a person or entity, regarding their interest in the Academy, will be unduly influenced by a secondary interest of that person or entity. Interests may be pecuniary, professional, personal, or any interest that affects judgment or action.

To avoid conflicts and to mitigate conflicts the board will ensure that its policies and decisions do not enhance the possibilities of conflicts. We will recognize the items in our charter contract and state law involving board relationships, nepotism, and those staffing relationships. We'll also work closely with our accountants and auditors to maintain internal controls and policies reflecting best practices in this area.

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

The Academy board will use a variety of information to aid the decision making process and policy development. New board policies, or revisions of existing policies will start in the appropriate board committee. If the policy does not originate in the governance committee, then the committee recommendation will then go to the governance committee. The governance committee will make a recommendation to the full board about whether a new policy is needed and what it should contain.

In making decisions, the board may consider recommendations from the administration, School Improvement Team, PTO, and board committees. Because important stakeholders are involved with all of these bodies, the board will effectively be getting input from all of the stakeholders. The board may also look at data including test scores, survey results, student performance statistics, community service performed, suspension rates, and reportable incident rates.

Before being finalized and implemented, new board policies will be made public and the board will solicit input from parents and staff. The board will carefully consider any input received before voting on any new policies.

Lastly, the board will encourage a board (and school) culture that allows for missteps. We believe that only by taking chances can one take larger and bolder strides, thus moving more efficiently. Board members will be encouraged to suggest creative ideas, vote independently, and be comfortable with board decisions that may not be unanimous or in their favor. This will make a healthier board and public charter school.

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 Academy will have a couple of important advisory bodies that will help the board in the governance of the school.

SIT: The School Improvement Team will be led by the principal and include other administrators, teachers representing each grade level and department, one board member, and at least two parents. The SIT will be responsible for developing and recommending amendments to the School Improvement Plan on an ongoing basis. They will meet at least once per month. The SIT will analyze, collect data, and make recommendations to the board in all areas of instructional programs, practices, and procedures.

PTO: The Parent/ Teacher Organization will operate as a separate organization sanctioned by the board. The PTO will consist of parent officers, committee chairmen, the principal, assistant principal, and three teacher representatives. The PTO will help oversee and facilitate extracurricular, recreational, social, and community service activities of the school. Both the SIT and the PTO will work collaboratively with the principal and school community and give monthly reports to the board of directors.

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

The staff grievance process, as outlined in the staff handbook, first calls for the staff member to bring up any problems with his or her immediate supervisor. If the issue is not resolved, the staff member will then outline the problem in writing and submit it to the principal. If the principal does not resolve the issue to the staff member's satisfaction, an appeal can be made to the personnel committee of the board. If the staff member is not satisfied with the results of the personnel committee, he or she may request a hearing of the full board of directors.

The grievance process for parents is similar, and will be outlined in the student handbook. The parent must first take the issue to the staff member with whom the parent or student has an issue. If the issue is not resolved, a formal, written grievance may be submitted to the principal. If the principal is not able to resolve the issue, the parent may request a hearing before the full board of directors. At the hearing, the parent and/ or his or her representative will be given a chance to present the grievance.

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

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,

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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.

Year One:

Principal
Office Manager
Core Content Teachers
EC Director
Teacher Assistants
Part Time Elective Teachers

Year Two:

Principal
Office Manager
Core Content Teachers
EC Director
Teacher Assistants
Part Time Elective Teachers

Year Three:

Principal
Office Manager
Core Content Teachers
EC Director
EC Teacher
Teacher Assistants
Part Time Elective Teachers

Year Four:

Principal
Vice Principal
Office Manager
Core Content Teachers
EC Director
EC Teacher
Teacher Assistants
Part Time Elective Teachers

Year Five:

Principal
Vice Principal
Office Manager
Core Content Teachers
EC Director
EC Teacher
Teacher Assistants

Staffing Plans, Hiring, and Management

Include the following information for the proposed charter school:

The board personnel committee will initially recruit a qualified principal. As soon as a principal has been identified, he or she will become a leader

of the recruiting and hiring process. Advertising for open positions will be done through the school website, social media, local newspapers, and college and university placement centers. The Academy's teachers will be professional, high performing teachers who have a strong belief in our mission. We will have a mentoring process that will allow experienced teachers to guide and mentor new teachers. The Academy will offer an administrative team that supports the teacher in his or her pursuit of a safe and orderly environment. We will survey the staff at least once per year and use data from the survey to inform decisions. Teachers will be given a voice as stakeholders by having representatives on the School Improvement Team (SIT) and the Parent Teacher Organization (PTO). The principal and the board personnel committee will develop a clear, consistent rubric that will be used to make salary and bonus decisions and the Academy will have a variety of high-quality and relevant professional development opportunities. The rubric will include the Academy's three core values that teachers are expected to uphold.

2. Provide a description of the relationship that will exist between the charter school employees and the nonprofit board.

The employees of the Academy will be employees of the board of directors. The board will hire and directly supervise the principal who will, with the help of other administrators when appropriate, directly supervise the other staff members. The board will approve all hires, position changes, terminations, staff policies, and staff procedures.

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

The Academy will use a variety of methods to attract interested, qualified candidates; including but not limited to: open house format, word of mouth, and directly contacting distinguished teachers that would be a good fit. Once potential candidates are identified, the board personnel committee or the principal will further vet the candidates and make recommendations for interviews. The board personnel committee, the principal, and the principal's hiring committee will all interview candidates before the principal makes a recommendation to the board of directors for approval. The principal's hiring committee will consist of staff members and at least one parent. Upon approval of the board of directors, new hires will undergo a criminal background check. No candidate will be offered an unconditional offer of employment without passing a criminal background check. The principal will be the direct supervisor of the staff. In that role, it will be his or her responsibility to notice any deficiencies in staff performance. Except for the most egregious offenses, the principal will use available resources at his or her disposal to remediate and develop the staff member so that expectations are met. Forms of development can range from small corrections to formal action plans for improvement. Plans of improvement will include clear performance expectations, support that the staff member will be offered to meet those expectations, and a reasonable, definitive time frame for meeting those expectations. If, after being on a formal action plan, the employee has still not demonstrated the expected improvement in performance, the principal may recommend the employee to the board for termination. The final decision to terminate an employee will belong to the board of directors. If an employee feels as though he or she has been wrongly terminated he or she may follow the formal grievance policy.

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

employment.

Principal: \$62,000- \$73,000

Office Manager: \$27,000- \$33,000

Core Content Teachers: \$37,000- \$47,000

EC Director: \$43,000- \$53,000

EC Teacher: \$42,000- \$51,000 (Starting Year 3)

Teacher Assistants: \$16,000- \$22,000

Part Time Elective Teachers: \$16,000- \$22,000

The Academy will offer a full range of benefits to full time employees, including a retirement plan, life insurance, medical, long and short term disability, and dental plans. Some of the benefits will be offered to employees at the expense of the Academy, while others will be offered as employee paid benefits.

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

The employee grievance policy will offer employees a process for resolving situations in which they feel they have been wronged, including wrongful termination. The first step in the grievance process is for the employee to speak to his or her immediate supervisor about the problem. If the issue is not resolved to the employee's satisfaction, a written grievance may be submitted to the principal. If the principal does not resolve the issue, the grievance will be submitted to the board personnel committee. If the committee does not resolve the issue, the employee may submit a written request for a hearing before the full Board of Directors.

The principal, as the direct supervisor of the employees, will have the responsibility to evaluate and develop employees. If, after an appropriate attempt to develop the staff member, including the action plan outlined above, the principal decides that the staff member is not a good fit for the Academy, he or she may make a recommendation to the board for termination. The final decision to terminate an employee will rest with the board.

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

As a public charter school, many staff members at the Academy may have dual roles and responsibilities. Some employees may be hired as part time employees and may hold positions outside of the Academy. Any employees with dual roles and responsibilities will be funded completely out of the general operating budget.

Starting off, there will be one Core Content Teacher acting also as the Curriculum Coordinator.

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

The special needs population, including ELL students, has been estimated based on the experience of other similar charter schools and staffing for the anticipated EC population is provided for in the budget. The Academy has budgeted for one EC Director starting in the first year. With an initial enrollment of 144 and estimating a 12% EC population, the Academy expects approximately 17 EC students. Some EC services, such as speech therapy, occupational therapy, and psychological services will be contracted out to qualified professionals. The contracted services also includes assistance for the EC Director in the first two years. The budget reflects estimates for those services based on the same projected 12% EC population. The process for hiring qualified EC staff is the same that will be followed for

hiring other staff members.

Gifted students will be served by classroom teachers who have been trained in classroom differentiation and by a rigorous, challenging academic program.

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).*

Principal: The principal will be responsible for overseeing the day to day operations of the school. He or she will implement the policies approved by the board of directors and will, at the direction of the board, supervise the school staff and ensure the school's compliance with all applicable laws, SBE policies, and testing procedures. The principal must be committed to the mission of the Academy and willing to work collaboratively to achieve the school-wide goals as set out in the application and the school improvement plan. Professional education experience and a master's degree in school administration is preferred.

Vice Principal: The Vice principal will report to the principal and perform duties delegated to him or her by the principal. The assistant principal will fulfill the duties of the principal in his or her absence. The assistant principal must be committed to the mission of the Academy and willing and able to work collaboratively to achieve the school-wide goals. Professional education experience and a relevant advanced degree is preferred.

Office Manager: The Office Manager will facilitate purchasing, invoicing, and inventory. He or she will have experience in office management. The manager will be responsible for student data, attendance, communications, and oversight of office procedures. The manager will work hand-in-hand with the third party accounting party to ensure that data is correct and prepared for board meetings.

Curriculum Coordinator: The curriculum coordinator will be one of the core content teachers. They will be responsible for supporting teachers in the implementation of Core Knowledge, Saxon Math, and Shurley English, as well as any other curricula approved by the board. He or she, with support and direction from the principal, will ensure that the Academy's educational program is implemented with fidelity. He or she will support teachers in PLCs, serve on the board academic committee, and work with the Core Knowledge Foundation to coordinate evaluations and professional development that will support the Academy in its efforts to become an official Core Knowledge school. He or she will have a bachelor's degree, will be committed to the mission and goals of the Academy, and have relevant education experience.

Core Content Teachers: Core Content Teachers will be responsible for teaching the subject matter, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Teachers must have the ability to become highly qualified in their subject area. Licensed teachers are preferred.

EC Director: The EC Director will be responsible for overseeing all EC Teachers, ensuring that all teachers are complying with IDEA and state laws. The EC Director is responsible for developing and implementing IEPs, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All EC Teachers must comply with state and federal laws. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Licensed EC Teachers are required.

EC Teachers: EC Teachers will be responsible for developing and implementing IEPs, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All EC Teachers must comply with state and federal laws. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Licensed EC Teachers are required.

Teacher Assistants: Teacher Assistants are responsible for reinforcing lessons presented by teachers by reviewing material with students one-on-one or in small groups. They are responsible for enforcing school and class rules to help teach students proper behavior. All Teacher Assistants will help teachers with record keeping, such as tracking attendance and calculating grades.

Part-Time Elective Teachers: Teachers will be responsible for teaching the subject matter, maintaining safe and orderly classrooms, working collaboratively to further the mission and goals of the school, maintaining accurate records, and contributing to the Academy's community. All teachers must have a complete understanding of the subject matter, and a bachelor's degree. Licensed teachers are preferred.

Staff Evaluation and Professional Development

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

The principal will be ultimately responsible for maintaining teacher licensure requirements and coordinating 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.*

The principal will be responsible for the professional development of all the staff, serving in effect as a mentor to all teachers and staff. Additionally, new teachers will be assigned experienced teachers to serve as mentors. Observations will be conducted in several different ways. The principal (or assistant) will conduct formal classroom observations at least once per quarter. These observations will be followed up with feedback in a post-observation meeting with the administrator. Additionally, an administrator will conduct informal walk-throughs at least twice per quarter. The principal will provide feedback from these informal observations in the form of a walk-through form that will be given to the teacher after the visit. For new teachers, mentors will also observe and provide feedback and support on a quarterly basis.

Retaining high quality teachers will be a priority for the administration

and the board. Teachers will be surveyed once or twice per year. The survey results will be reported to the personnel committee and full board and will help inform the decisions that are made for the school's hiring committee, and various board committees. A teacher evaluation rubric will be developed and used for the annual teacher evaluations. Indicators will include parent surveys, NWEA scores in growth and proficiency, EOGs, NCEES data, parent satisfaction survey results, additional roles and responsibilities, and involvement with the the Academy's community. Scores from the rubrics will be used to determine annual raises and bonuses, if funds are available.

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 staff development plan consists of three distinct kinds of development:

Formal: The formal, staff-wide development will be delivered internally, sometimes by an administrator and sometimes by someone brought in with expertise on a specific topic. Formal development will include most of the before school professional development days and will also occur during many teacher work days and monthly staff meetings.

Individual: Individual professional development includes external, subject specific training. For new teachers, mentors will provide valuable development in the form of frequent feedback and support. Instructional observations, coupled with feedback from the principal and other administrators will provide further valuable professional development for the staff. The curriculum coordinator (designated and experienced core content teacher) will work with teachers individually to provide support, coaching, modeling, and other assistance.

Small Group: Teachers will be expected to meet in small groups weekly. These professional Learning Communities will serve as another way for teachers to evaluate their lessons, plans, and instruction. The administrators and curriculum coordinator will frequently attend these meetings and offer feedback, coaching, resources, best practices, and support with the goal of improving instruction and student learning. New teachers will also participate in new teacher training in the form of monthly small groups where they will receive training and support to help them develop and grow into effective, experienced educators.

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.*

The principal will be responsible for planning the professional development of the staff. Five full days of PD are scheduled before school begins and are reflected in the school calendar. Three of those days will be exclusively Core Knowledge training. Other topics to be covered include how to successfully implement Saxon Math, Shurley English, and Core Knowledge Language Arts. Interpreting NWEA results, classroom management and classroom differentiation will also be covered. Topics from the days before school starts will be revisited periodically throughout the year on teacher workdays and during monthly staff meetings. After the five full days of Professional Development, teachers will have the following Monday and Tuesday to attend their own professional development and setup their

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classrooms before starting school on that Wednesday.

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.*

Six full days of professional development are scheduled throughout the year, indicated as teacher work days on the school calendar. During those days, at the discretion of the principal, topics from the initial pre-opening days will be revisited in more depth. Additional topics may be covered as needed. Additional professional development will also take place at monthly staff meetings and at monthly new teacher training meetings. The principal will work with the assistant principal (after the first year) and the curriculum coordinator to design and implement a coherent professional development plan within the framework outlined here. There are also other professional development opportunities during the school year (on teacher work days) via webinar. There are two teacher workdays at the end of the school year that are dedicated to closing out the year.

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.218.45(a-i) carefully.

Marketing Plan

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

The Academy will market the school in a variety of ways with the intention of allowing as many people as possible the opportunity to apply and be a part of the lottery, if necessary.

Parent Interest Meetings: The Tillery Charter Academy has already held a successful Parent Interest Meeting on August 23, 2017 in Troy. The Academy plans to have more community meetings that generate the same or more interest. At every meeting, board members will collect contact information of attendees to follow up and have them join our Community Outreach Team. This team will assist the board in going door-to-door notifying families about the opportunity to attend Tillery Charter Academy.

Community Events: Representatives from the school will attend community-wide events to promote the opening of the school, such as the Montgomery County Ag Fair, County Commissioner Meetings (as done initially back in August by the board). At these events, the board and volunteers will hand out flyers and letters of intent for parents. This will help the school get an estimate of enrollment numbers and seek out business partners for the school. The Academy has been collecting the emails of interested community members, business owners, parents, and teachers to start building a communications list. This list will be used to notify those interested of upcoming events.

Advertising: The Academy will advertise its open enrollment period in local media, including newspapers like the Montgomery Herald, and online to give

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as many people as possible an opportunity to apply before the lottery is held.

Parent and Community Involvement

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

Tillery Charter Academy will communicate and engage with parents through the following:

- Our website: www.tillerycharteracademy.org currently allows parents to fill out our community interest survey and learn about our mission. The website will expand to include more opportunities for parents and community members to engage such as volunteering, joining the Parent Teacher Organization, and being a part of our crucial Community Outreach Team. All meeting minutes will be posted on the website so parents have easy access to what the board discusses at the monthly meetings. The website will keep updates of how students and teachers are applying the Academy's three core values out in the community. We want to be an integral part of the Montgomery County community and show how we can help.

- Our email: tillerycharteracademy@gmail.com is linked to our Mail Chimp account which allows us to keep a database of emails and lists. Once our school is approved, we will be communicating with families and members of the community already on our lists about enrollment, how to join our Community Outreach Team, and volunteer time to help the Academy open. Parents will be notified via email and phone about a lottery date (if needed) and receive other important enrollment information. Once the school opens, Tillery Charter Academy will use email to communicate important messages to parents, students, and teachers.

- Public Events: The Academy will continue to hold public events to ensure the community is up to date on the progress of Tillery's opening. As in the past, the board has attended county commissioner meetings and held public interest meetings. This is crucial to the success of the school. As the school opens, students, teachers, and the board will be living out the Academy's core values in the community: having the courage to speak up, respecting each unique citizen, and tackling community problems with a spirit of adventure.

Once the school is open and operating, The Academy live out its three core values, Courage, Respect, and Spirit of Adventure in the community. We will seek out community leaders, business owners, and most importantly, the parents to help live out these values in the community. We intend to foster and maintain our relationships to seek new opportunities for the Academy to grow in the community. Parents will have the opportunity to join the Parent Teacher Organization and hold the school/board accountable for upholding its mission and the three core values.

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.*

1. The open enrollment period will begin on the date of final approval from the SBE and end on Friday, February 15th at 5:00 pm. Before final approval, interested parents may fill out a letter of interest. Everyone who submits a letter of interest will be contacted and informed about how to apply as soon as final approval is granted. To apply to Tillery Charter Academy, parents must fill out an application and mail it or hand deliver it to the school's temporary office. There will also be an option to fill out an online application. To be included in the lottery, applications must be in the office by 5 pm on February 15th, 2018.

2. If a lottery is necessary, it will be held in a public place and announced on the Academy's website and Facebook page. All of the names for the lottery will be written on cards and drawn at random. After all of the names have been drawn to fill the available spots, the rest of the names will be drawn and placed on a numbered waiting list. Families need not be present at the lottery to accept enrollment. Families will be notified in writing whether they were drawn in the lottery and will be offered a spot for enrollment or where they were placed on the waiting list. Enrollment paperwork will be sent to students who secure a spot in the lottery process.

The Academy will give preference in the lottery to:

- students of full-time staff
- students of board members

For siblings, multiple birth and otherwise, Tillery Charter Academy will enter one card in the lottery with the names of all of the siblings on it. If the family card is drawn in the lottery, the Academy will offer enrollment to all of the siblings on the card. Following that procedure should ensure that siblings will be able to stay together and all attend ACA. After the first year, siblings of students who were enrolled at the Academy the previous year will also get enrollment preference.

3. If a spot opens, the first student from the waiting list will be offered the spot through the first day of the second quarter. Families will be offered information and a reasonable amount of time to make the decision to accept or decline the spot. If the family chooses to decline the offer of enrollment, the next student on the waiting list will be offered a chance to enroll. If a student wishes to withdraw from the Academy, they will be asked to do so in writing. The parents will fill out a form that asks them to list the reason for the withdrawal. If the reason for the withdrawal is transportation the principal will ask to meet with them to formulate a

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personal transportation plan so that the student can remain at the Academy. The Academy will have no preference for previously enrolled students. If a student wants to transfer to another school, he or she will first have to be withdrawn from the Academy, using the procedure outlined above.

4. There will be no pre-admission activities for students or parents of the Academy.

5. Students withdrawing from the Academy will be asked to do so in writing. The withdrawal form will include the reason for the withdrawal and the school to which the student will be transferring.

Weighted Lottery

Does your school plan to use a weighted lottery?

Yes:

No: X

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

- 1. In no event may a lottery process illegally discriminate against a student on the basis of race, religion, ethnicity, gender, or disability.*
- 2. A lottery process may not be based upon geographic boundaries, such as zip code or current public school attendance zones.*
- 3. A lottery process that deviates from the standard lottery must be based upon the school's unique mission and must be based upon educationally, psychometrically and legally sound practices, protocol and research.*

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

- 1. A thorough explanation of how the specific mission of the school, as set forth in the application, requires the utilization of the weighted or limited lottery.*
- 2. A thorough description of the processes and procedures the applicant intends to use to effectuate the lottery.*
- 3. The underlying research, pedagogical, educational, psychometric and legal, that supports the request and the procedures the applicant is requesting.*

PROJECTED ENROLLMENT

2018-19 through 2022-2023

IDENTIFY LEA FROM WHICH
STUDENTS WILL PROBABLY COME

LEA #1 Montgomery County Schools

LEA #2 Stanly County Schools

LEA #3

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.

	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	LEA 620	LEA 840	LEA 000	LEA 620	LEA 840	LEA 000	LEA 620	LEA 840	LEA 000	LEA 620	LEA 840	LEA 000	LEA 620	LEA 840	LEA 000
Kindergarten	37	11	0	37	11	0	37	11	0	37	11	0	37	11	0
Grade 01	37	11	0	37	11	0	37	11	0	37	11	0	37	11	0
Grade 02	37	11	0	37	11	0	37	11	0	37	11	0	37	11	0
Grade 03	0	0	0	37	11	0	37	11	0	37	11	0	37	11	0
Grade 04	0	0	0	0	0	0	37	11	0	37	11	0	37	11	0
Grade 05	0	0	0	0	0	0	0	0	0	37	11	0	37	11	0
	111	33		148	44		185	55		222	66		222	66	

Section IV: Governance and Capacity Concerns and Additional Questions	Reviewer	Page Reference
How will the board be evaluated? If a staff member has a grievance with the principal, how will that be handled?	Shannon Sellers	Governance a
Stacy Bruton did not appear to respond to the question about previous Board experience. PTO reports directly to the Board? This appears to be contrary to most Board's general purposes. How will a parent be added to the Board - after enrollment starts? What is this process?	Jonathan Bryant	Governance a
***How will the board's governance structure and composition help the board to evaluate the success of the school and school leader? ***The applicant mentioned the possibility of adding 2 more board members. What expertise will these new board members contribute? ***What is the plan for ongoing board training and development including a timetable and specific topics to be addressed? ***Are there any existing relationships that could pose actual or perceived conflicts of interest if the application is approved? ***If a grievance is with the principal, what happens during the grievance process? ***How will the governing board and individual board members be evaluated? ***What is the missing Section 5 in Article 5 of the bylaws? What is considered to be a quorum at board meetings?	Kebbler Williams	Governance a
conflict of interest with Rhonda?	Amy Ruck Kagan	Governance a
Applicant needs to clarify: Will the EC director provide ELL services as well?	Kristen Parker	Staffing Pla
Applicant needs to clarify: A process for hiring is outlined, but how will the school retain high performing teachers?		
***What qualifications must teacher assistants have to be hired? ***What is the employee's course of action if the grievance is with the principal? ***What is the plan for having qualified staff for English Language Learners? ***Is it reasonable to expect that a core content teacher will also be the Curriculum Coordinator? The duties described for this position require someone who can be dedicated to them full-time in order to be most effective.	Kebbler Williams	Staffing Pla
Who will serve the ELL students, as a position is not denoted in the first year? Will the Curriculum Coordinator also be a full time teacher? The description of the curriculum coordinator appears to be a full time job. How will you retain this highly qualified teacher that is performing 2 full time jobs?	Shannon Sellers	Staffing Pla
Criminal background check procedure is not outlined in a detailed manner.	Jonathan Bryant	Staffing Pla
More detail on recruitment and retention of school staff- what the interview will look like, ways to recruit, timeline, etc.	Amy Ruck Kagan	Staffing Pla
Applicant needs to clarify: Will the Principal have enough capacity to maintain teacher licensure and provide appropriate PD for teachers?	Kristen Parker	Staff Evalua
Applicant needs to clarify: How will the proposed methods of professional development support teachers internalization of the Core Knowledge and Saxon Math curriculum? 3 days are outlined at the beginning of the year for this but what will on going PD look like?		
Which evaluation tool will be used for teachers? Core Knowledge typically requires significant PD to achieve fidelity, this plan only allocates 3 days. As a "classical" school - is there any thought to specific PD with regard to this?	Jonathan Bryant	Staff Evalua
Is three days of Professional development enough to thoroughly train teachers on Core Knowledge, Saxon Math, and core values? Can the principal effectively provide the Professional Development for teachers as well as maintain licensure requirements?	Shannon Sellers	Staff Evalua
This plan seems fairly minimal.	Jonathan Bryant	Marketing Pl
***What are the applicant's plans to achieve a reasonable reflection of the racial/ethnic and other demographic composition of Montgomery County Schools?	Kebbler Williams	Marketing Pl
***What is the plan for building engaging partnerships between the family and the school that strengthen support for student learning?	Kebbler Williams	Parent and C
No mission information is currently on website.	Jonathan Bryant	Parent and C

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How will business owners, community leaders and parent "help to live out these values? What is the expectation for these 3 groups?	Shannon Sellers	Parent and C
There is only a meeting with those that wish to withdraw because of transportation?	Jonathan Bryant	Admissions P
concern about high % of local LEA enrollment.	Joe Maimone	Projected St

Reviewer	Score
Alex Quigley	
Amy Ruck Kagan	Pass
Kenneth Tucker	
Jonathan Bryant	Pass
Joe Maimone	Pass
Lindalyn Kakadelis	
Glenn Allen	
Kebbler Williams	Pass
Kristen Parker	Pass
Phyllis Gibbs	
Shannon Sellers	Pass
Sherry Reeves	Pass
Tammi Sutton	

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.

NC law says, "The charter school shall develop a transportation plan so that transportation is not a barrier to any student who resides in the local school administrative unit in which the school is located." Because Montgomery County is large geographically (491 square miles) and has no existing charters, accessibility may be difficult for many students. The Academy will provide one or two buses that we anticipate being the mode of transportation for approximately one-third of our students.

To reach all the students needing a school bus we have budgeted \$60,000 in year one. We have communicated with the Finance & Business Division, and the Transportation Section for assistance in safety, laws and policy, operational requirements, and purchasing.

We will contract with a provider like Eagle Bus Service who will provide us with one or two buses, drivers, fuel and maintenance, and managing the busing process or; we will find used buses that typically have to be retired from the state fleet at 200,000 miles and can be purchased often for under \$5,000. We project, based upon exact numbers from a nearby charter, that we can provide for about 120 miles of daily bus travel from Eagle for the \$60,000.

We will also apply for the new transportation cost refund offered by new state law for charters with 50% FRL student populations. Since the credit award does not apply to bus depreciation or drivers this refund, estimated to be up to \$39,000 per year ($65\% \times \$60,000$), may drive us to choose the bus service as described versus purchasing and operating our own bus(es).

Prior to the opening of school we will use Google mapping and specialty software to connect parents who may consider carpooling in order to have an organized as possible plan for many to carpool on day one and throughout the year. We see other benefits, including early relationship building among parents and students who might carpool and develop friendships earlier than otherwise.

Once we have a location we will devise a car traffic stacking plan and coordinate that with Anson County and DOT officials for local and state compliance, keeping the safety of our students paramount.

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.

We have a duty to holistically care for and nurture the students of the

Academy, not just academically, but socially as well. Therefore, the Academy will strive to make sure all students, regardless of income, are able to have a healthy lunch at school. Students at the Academy will have several options when it comes to lunch at school.

1. Students may bring lunch from home. Milk will be available for purchase or possibly free.

2. On selected days, students may purchase lunch through an outside vendor. The cost of these lunches will have a small profit built in that will be used to help pay for the lunches of the students who cannot afford to purchase one. A target from the "paying" students would be \$10,000 per school year.

3. Cold lunches will be available for students who forget their lunch. A small profit will be built into the cost of these lunches that will be billed to the parents. This mark-up will be used to help pay for the lunches of the students who cannot afford to purchase one.

4. For students who qualify for free and reduced lunch, the Academy will provide a lunch. On days when vendor lunches are available, we will provide those students on free or reduced lunch with a meal from that vendor. On days when vendor lunches are not available, the Academy will provide a cold meal to students on free or reduced lunch.

The Academy has budgeted \$30,000 for meals in its opening year. In that calculation we estimated a maximum of 26,640 total potential meals over 185 days. With half of our students being given free meals at a cost of \$3, given a negotiated pricing menu or volume discounts on purchased foods and beverages, the cost would be \$39,960. That will be subsidized by the paid for meals mentioned above to the extent of \$10,000, bringing the net meals cost down to the \$30,000 budgeted.

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

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	\$1, 155.00
Officers and Directors/Errors and Omissions	\$1, 000, 000	\$3, 057.00
Property Insurance	\$250, 000	\$450.00
Motor Vehicle Liability	\$1, 000, 000	\$181.00

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Bonding Minimum/Maximum Amount	\$250,000	\$250,000	\$332.00
Other	\$1,000,000		\$5,592.00
Total Cost			\$10,767.00

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

Health and Safety Requirements:

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

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

arodriguez2187 08/27/2017

(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.

North Carolina new charters have severe challenges with facilities as they are neither provided for directly, as in district schools, nor funded, directly or indirectly.

The initial facilities will be leased with consideration of purchasing between years 3 and 10 as the Academy builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and the Academy or a transaction including a developer such as Schoolhouse Development, American Charter Development, HighMark, or another partner. These companies assist charters in locating facilities, using their network of local commercial real estate brokers and then purchasing them with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buyout. Many of the agreements add a provision that the developer/lender will later provide a new constructed facility after the term lease of the initial facility.

The facility will be in compliance with all necessary health and safety requirements required as well as any steps necessary to obtain the Educational Certificate of Occupancy.

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Montgomery County is a state designated low-wealth county (75% of the LEA students qualify for FRL) located in the midst of the Uwharrie mountain range. It has primarily five towns, Candor, Star, Biscoe, Mt. Gilead, and the largest municipality and the county seat, Troy. Troy is also in the middle geographically with Mt. Gilead in the southwestern section of the county and Star, Biscoe, and Candor in the eastern section.

There are no public charter schools in Montgomery County and no charter elementary choices close by. This county has endured out-migration with families leaving for better jobs and schools. This has left many vacant or underutilized churches and commercial facilities available.

To date the board has identified several properties. We are looking for a space of 10,000 to 12,000 square feet and growing to about 20,000 to 24,000 at our maximum enrollment of 288.

Our facilities budget of \$72,000 in lease expense was based upon 10,000 square feet at \$7.20 a foot.

We have contacted the Montgomery County Board of Education about two facilities it owns which are expected to be available. One is West Montgomery High School, near Mt. Gilead, and the other is East Montgomery High School in Biscoe. The district is consolidating its only two high schools with a central location in Troy. West Montgomery is a preferred location because of its western county site and its proximity to Stanly County, which has no elementary charter either. The school board chair wrote "East Montgomery and West Montgomery will be razed to provide a clean site for industrial recruitment for Montgomery County," but the newly revised statutes regarding charter use of facilities (N.C.G.S. 115C-218.35 et seq.) exclude "razed to provide a clean site for industrial recruitment" as a use precluding the leasing to another public school. The only reasons to deny a charter use are the "lease is not economically or practically feasible or that the local board does not have adequate classroom space to meet its enrollment needs. For the purposes of this section, a building or land is available if it is closed, vacant, or otherwise unused for classrooms, administrative offices, or extracurricular activities of the schools of the local board of education."

Our offer to discuss is in a letter to the Montgomery BOE and appended in Appendix O.

Other options we have investigated include a 7.5 acre and another 20 acre site on Highway 24-27, east of Troy, the Highland Community Center near Mt. Gilead, several churches, and a shopping center in Troy, the county seat.

Overall, we believe Troy is the most ideal site for our school based upon its size and central location.

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.

Most of the space we have investigated in Montgomery County has depressed purchase and rental rates. We fully anticipate being able to lease space for \$7-\$8 a foot.

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.*

While the Academy board possibly works with a commercial broker and the developers listed above, to find a suitable permanent facility, it will simultaneously be looking for contingency facilities.

The Academy board will identify sites that can be used with limited modifications for a period of sixth months to two years in the event that a permanent site cannot be found in time for a 2018 opening. One of these additional sites, if needed, will allow the Academy additional time to locate and acquire a permanent site. Examples of a site suitable for one to two years include large churches and synagogues.

The Academy board will also identify sites that can be used temporarily, for a period of two to eight weeks, in the event that a permanent site has been identified but is not ready in time for a 2018 opening. One of these back-up sites will allow us additional time to complete any necessary modifications to the permanent site. Examples of a suitable site for up to 8 weeks are churches, community centers, and movie theaters.

Modular classrooms("Educational Cottages") by companies such as Mobile Modular and Vanguard have units already approved for educational units and available quickly for as little as one month.

Any modifications of the programs will depend on the site that is ultimately used. The most likely scenario is that PE will have to be modified if the contingency facility does not have a gym. The Academy will be looking for a facility with 2 administrative offices, outdoor play area, parking for at least 90 cars, and 8-10 classrooms.

Section V: Operations Concerns and Additional Questions	Reviewer	Page Reference
How will you provide transportation to students that have special transportation identified as a related service on their IEP?	Glenn Allen	Transportati
***Why does the board predict that at least 50% of its students will qualify for free or reduced-price meals? ***Why does the board intend to coordinate a car traffic stacking plan with Anson County when the school is going to be located in Montgomery County?	Kebbler Williams	Transportati
IF the school is going to be in Montgomery County, why are coordinating with Anson County in regards to car traffic?	Shannon Sellers	Transportati
What is a cold meal? Earlier in the application, you estimate that 50% of your population will receive Free/Reduced Lunch, will the "mark-up" on the vendor meals and the cold meals be enough to cover the cost for these students' daily meals? How many days will vendors be present, and will this be confusing to parents and students as to when lunch will be served?	Shannon Sellers	School Lunch
***Of what will a "cold meal" consist?	Kebbler Williams	School Lunch
Why "selected days" for vendor lunches, why not all school days? "Cold lunch?"	Jonathan Bryant	School Lunch
Applicant needs to clarify: How will you ensure this process runs smoothly? Having	Kristen Parker	School Lunch

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lunch provided on some days and not on others seems to potentially be confusing for parents and families.		
How does \$7-8/sq foot compare to other properties in the area?	Jonathan Bryant	Facility and
***How does \$7-8 per square foot compare to other commercial and educational spaces in Montgomery County?	Kebbler Williams	Facility and
plans regarding contingency do not include where to place modulares	Amy Ruck Kagan	Facility and

Reviewer	Score
Alex Quigley	
Amy Ruck Kagan	Fail
Tammi Sutton	
Sherry Reeves	Pass
Shannon Sellers	Pass
Phyllis Gibbs	
Kristen Parker	Pass
Kebbler Williams	Pass
Glenn Allen	
Lindalyn Kakadelis	
Joe Maimone	Pass
Jonathan Bryant	Pass
Kenneth Tucker	

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 2018-19

SHOW CALCULATIONS FOR FIGURING STATE AND LOCAL DOLLARS FOR THE PROPOSED CHARTER SCHOOL <i>Refer to the <u>Resource Manual Finance Section</u> for guidance on estimated funding amounts</i>	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 1 st month average daily membership. - In year 1 – Base state allotments are determined by the LEA in which <u>the student</u> resides - In year 2 and beyond- Base State allotments are determined by the LEA in which <u>the school</u> 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 #1 620 - Montgomery County Schools			
	Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
	State Funds	\$5,992.17	111	\$665,130.87
	Local Funds	\$1,329.89	111	\$147,617.79
	Federal EC Funds	\$4,253.55	13	\$55,296.15
	Totals			\$868,044.81
	LEA #2 840 - Stanly County Schools			
	Revenue	2016-2017 Per Pupil Funding	Projected LEA ADM	Approximate funding for 2018-2019
	State Funds	\$5,592.76	33	\$184,561.08
	Local Funds	\$1,242.82	33	\$41,013.06
	Federal EC Funds	\$3,367.15	4	\$13,468.60
	Totals			\$239,042.74

Total Budget: Revenue Projections 2018-19 through 2022-2023

INCOME: REVENUE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
-State ADM Funds	\$849,692	\$1,093,164	\$1,366,455	\$1,639,746	\$1,639,746
-Local Per Pupil Funds	\$188,631	\$249,142	\$311,428	\$373,713	\$373,713
-Exceptional Children Federal Funds	\$68,765	\$91,457	\$114,322	\$137,186	\$137,186
-Other Funds*	\$0	\$0	\$0	\$0	\$0
-Working Capital*	\$0	\$0	\$0	\$0	\$0
Z - TOTAL REVENUE	\$1,107,088	\$1,433,763	\$1,792,205	\$2,150,645	\$2,150,645

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

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

Personnel Budget: Expenditure Projections 2018-19 through 2022-2023

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	2018-2019			2019-2020			2020-2021			2021-2022			2022-2023		
	<i>Num Staff</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>	<i>FTE</i>	<i>Avg Salary</i>	<i>Total salary</i>
Administrative & Support Personnel:															
Principal	1	\$68,000	\$68,000	1	\$71,000	\$71,000	1	\$73,000	\$73,000	1	\$75,000	\$75,000	1	\$77,000	\$77,000
Assistant Principal	0	\$0	\$0	0	\$0	\$0	0	\$0	\$0	1	\$55,000	\$55,000	1	\$55,000	\$55,000
Office Manager	1	\$32,000	\$32,000	1	\$32,500	\$32,500	1	\$33,000	\$33,000	1	\$34,000	\$34,000	1	\$35,000	\$35,000
A - Total Admin and Support:	2		\$100,000	2		\$103,500	2		\$106,000	3		\$164,000	3		\$167,000
Instructional Personnel:															
Core Content Teacher(s)	6	\$42,000	\$252,000	8	\$44,000	\$352,000	10	\$46,000	\$460,000	12	\$48,000	\$576,000	12	\$49,000	\$588,000
Exceptional Children Director	1	\$44,000	\$44,000	1	\$46,000	\$46,000	1	\$48,000	\$48,000	1	\$49,500	\$49,500	1	\$50,000	\$50,000
Teacher Assistants	3	\$19,000	\$57,000	4	\$20,000	\$80,000	5	\$22,000	\$110,000	5	\$22,000	\$110,000	5	\$23,000	\$115,000
Part Time Electives/Specialty Teacher(S)	2	\$20,000	\$40,000	2	\$22,000	\$44,000	2	\$24,000	\$48,000	2	\$26,000	\$52,000	3	\$27,000	\$81,000
Exceptional Children Teacher(s)	0	\$0	\$0	0	\$0	\$0	1	\$46,000	\$46,000	1	\$48,000	\$48,000	1	\$49,000	\$49,000
B - Total Instructional Personnel:	12		\$393,000	15		\$522,000	19		\$712,000	21		\$835,500	22		\$883,000
A+B = C - Total Admin, Support and Instructional Personnel:	14		\$493,000	17		\$625,500	21		\$818,000	24		\$999,500	25		\$1,050,000
Administrative & Support Benefits															

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Retirement Plan-401k	2	\$2,600	\$5,200	2	\$2,730	\$5,460	2	\$2,860	\$5,720	3	\$2,900	\$8,700	3	\$2,980	\$8,940
Life & Disability Insurance	2	\$1,300	\$2,600	2	\$1,370	\$2,740	2	\$1,440	\$2,880	3	\$1,500	\$4,500	3	\$1,540	\$4,620
Medicare, Social Security & Unemployment	2	\$4,325	\$8,650	2	\$4,500	\$9,000	2	\$4,700	\$9,400	3	\$4,800	\$14,400	3	\$4,900	\$14,700
Health Insurance	2	\$4,500	\$9,000	2	\$4,700	\$9,400	2	\$4,900	\$9,800	3	\$5,100	\$15,300	3	\$5,200	\$15,600
D - Total Admin and Support Benefits:	8		\$25,450	8		\$26,600	8		\$27,800	12		\$42,900	12		\$43,860
Instructional Personnel Benefits:															
Retirement Plan- 401k	10	\$2,600	\$26,000	13	\$2,730	\$35,490	17	\$2,860	\$48,620	19	\$2,900	\$55,100	19	\$2,980	\$56,620
Life & Disability Insurance	10	\$1,300	\$13,000	13	\$1,370	\$17,810	17	\$1,440	\$24,480	19	\$1,500	\$28,500	19	\$1,540	\$29,260
Medicare, Social Security, & Unemployment	12	\$2,855	\$34,260	15	\$3,000	\$45,000	19	\$3,150	\$59,850	21	\$3,244	\$68,124	22	\$3,340	\$73,480
Health Insurance	10	\$4,500	\$45,000	13	\$4,700	\$61,100	17	\$4,700	\$79,900	19	\$5,100	\$96,900	19	\$5,200	\$98,800
E - Total Instructional Personnel Benefits:	42		\$118,260	54		\$159,400	70		\$212,850	78		\$248,624	79		\$258,160
D+E = F - Total Personnel Benefits	50		\$143,710	62		\$186,000	78		\$240,650	90		\$291,524	91		\$302,020
A+D = G - Total Admin and Support Personnel (Salary & Benefits)	10		\$125,450	10		\$130,100	10		\$133,800	15		\$206,900	15		\$210,860
B+E = H - Total Instructional Personnel (Salary & Benefits)	54		\$511,260	69		\$681,400	89		\$924,850	99		\$1,084,124	101		\$1,141,160
G+H = J - TOTAL PERSONNEL	64		\$636,710	79		\$811,500	99		\$1,058,650	114		\$1,291,024	116		\$1,352,020

Operations Budget: Expenditure Projections
2018-19 through 2022-2023

BUDGET OPERATIONS EXPENDITURE PROJECTIONS		2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
	Administrative & Support:					
Other	Legal Fees	\$2,500	\$2,600	\$2,700	\$2,800	\$2,900
	Advertising & Marketing	\$2,400	\$2,200	\$2,300	\$2,350	\$2,400
	Insurance	\$13,000	\$13,500	\$14,000	\$14,500	\$14,500
	Communications, Website, Admin Software	\$12,000	\$12,000	\$15,000	\$18,000	\$18,500
	Facility Rent	\$72,000	\$95,000	\$120,000	\$144,000	\$144,000
	Facilities R&M & Janitorial Contract	\$18,000	\$24,000	\$30,000	\$36,000	\$37,000
	Facilities Utilities	\$15,000	\$20,000	\$25,000	\$30,000	\$31,000
	Office Expense & Supplies, Postage	\$6,000	\$8,000	\$10,000	\$12,000	\$12,500
	Linq, Powerschool & Operations Contract	\$50,000	\$60,000	\$70,000	\$80,000	\$80,000
	Student Transportation	\$60,000	\$70,000	\$75,000	\$80,000	\$80,000
	Student Meals	\$30,000	\$53,000	\$66,500	\$79,800	\$80,000
	Technology, Equipment, Capital Assets	\$12,000	\$8,000	\$10,000	\$12,000	\$12,500
	Travel	\$1,800	\$1,900	\$2,000	\$2,100	\$2,150
	I T Services	\$10,000	\$24,000	\$15,000	\$18,000	\$18,000
	Audit Fee (Payable Year 2 Forward)	\$0	\$9,000	\$10,000	\$10,500	\$10,750
	Non Categorized Expenses	\$5,000	\$6,600	\$8,300	\$9,900	\$10,000
	K - TOTAL Administrative & Support Operations	\$309,700	\$409,800	\$475,800	\$551,950	\$556,200
	Instructional:					
Other	Curriculum & Books, Supplies	\$18,000	\$22,000	\$26,000	\$27,000	\$27,500
	Staff Development	\$18,000	\$24,000	\$28,000	\$34,000	\$34,000
	Assessment & Fees	\$5,000	\$6,500	\$8,300	\$10,000	\$10,000
	Classroom Technology, Furniture, And Capital Asset	\$12,000	\$15,000	\$19,000	\$23,000	\$23,500
	Substitutes	\$5,000	\$6,500	\$8,300	\$10,000	\$10,500
	Exceptional Children Contracted Services	\$12,000	\$14,000	\$15,000	\$16,000	\$16,500
	English Language Contracted Services	\$15,000	\$17,000	\$18,000	\$19,000	\$19,500
	Non Categorized Expenses	\$5,000	\$6,500	\$8,300	\$10,000	\$10,500
	L - TOTAL Instructional Operations	\$90,000	\$111,500	\$130,900	\$149,000	\$152,000

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	K+L = M - TOTAL OPERATIONS	\$399,700	\$521,300	\$606,700	\$700,950	\$708,200
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Overall Budget:

BUDGET OPERATIONS EXPENDITURE PROJECTIONS	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
J - TOTAL PERSONNEL	\$636,710	\$811,500	\$1,058,650	\$1,291,024	\$1,352,020
M - TOTAL OPERATIONS	\$399,700	\$521,300	\$606,700	\$700,950	\$708,200
J+ M =N TOTAL EXPENDITURES	\$1,036,410	\$1,332,800	\$1,665,350	\$1,991,974	\$2,060,220
Z - TOTAL REVENUE	\$1,107,088	\$1,433,763	\$1,792,205	\$2,150,645	\$2,150,645
Z - N = SURPLUS / (DEFICIT)	\$70,678	\$100,963	\$126,855	\$158,671	\$90,425

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.

Enrollment Number:

Montgomery County has five public elementary schools (that include a 3rd grade and up) with 1,884 students. If we start with a conservative number, 144 the first year, we would have 7.6% of the district students in our grades K through 2. We would then add a grade a year and 48 students per year to get to 288 in year four. This would total 15.3% of the county's K-5 population. Of course the 1,884 above excludes those attending the county's three private schools, 144 more students attending charter schools beyond Montgomery's borders and 255 home schools (representing an estimated 400 students) as reported by the NCDQA division of non-public education. Of course these numbers do not include families in surrounding counties such as Stanly who would apply to our school.

Therefore our enrollment projections are reasonable from a management standpoint but also attainable from a demographic perspective.

Why the demand:

Montgomery County is a state designated low-wealth county (75% of the LEA students qualify for FRL) located in the midst of the Uwharrie mountain range. It has primarily five towns, Candor, Star, Biscoe, Mt. Gilead, and the largest municipality and the county seat, Troy. Troy is also in the middle geographically with Mt. Gilead in the southwestern section of the county and Star, Biscoe, and Candor in the eastern section.

There are no public charter schools in Montgomery County and no charter elementary choices close by. Families have told our board members that the county desperately needs a charter option, not only for the charter students but for the district students who should, over time, be impacted by the LEA which should compensate by improving with this new competitor in the education "marketplace."

Better academic outcomes should be expected in the county. The five elementary schools average achievement or proficiency score for 15-16 was 52. Four of the schools had a School Performance Grade of C and one had a D.

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One of our academic goals is to have a B in our first year of testing, and increasingly exceed the LEA proficiency by aggressive, yet obtainable percentages.

Break-even:

The break-even point in number of students, using a traditional break-even analysis formula, was calculated by dividing non-variable costs (fixed costs, \$117,400) by margin, or revenue (\$7,462) less variable costs (\$6,382) per student. That number was 109 students to break even. Caveat: it should be noted here that the NCDPI online application is miscalculating revenue and may have distorted the calculation above as well as the overall budget.

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

We will avoid under enrollment pressure by aggressively marketing our school, securing a well-known safe and attractive facility, and solidifying the parents' commitment way before the first day of school. Events such as "Curriculum Night" and "Spirit Night", help with the parent buy-in. However, actual under-enrollment would be handled financially by:

- 1 Reducing the classes and the matching teacher positions, payroll, and benefits immediately.
- 2 Restructuring the facility lease arrangement to defer the deposit and the first and 12th month's rent.
- 3 Restructuring the Core Knowledge curriculum and training expense.
- 4 Leasing versus paying for capital equipment.
- 5 Renegotiating all contracts.
- 6 Board of Director loans.
- 7 Bank loans.

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

No.

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

24 to 1

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.*

We will contract for Exceptional Children and English Language Learners services to complement our one full time EC teacher.

To achieve savings in the administration and business services of our school we will contract those tasks to a business services provider, Goodall Consulting Corporation (GCC). Economies of scale are realizable because we will avoid having to perform all the many non-academic functions of a charter school and additionally will recognize savings by buying in quantities otherwise not available to our school by itself. Because charter heads of school spend up to 65% of their time in the "business" of running a charter, we prefer that our principal focus on the staff and students,

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If you have questions regarding the application process, please contact the Office of Charter Schools via email at deanna.townsend-smith@dpi.nc.gov.

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his/her own personal and professional development, plus leadership among all the stakeholders, including the broader community.

In the Fordham Foundation's recent report, "Three signs that a proposed charter school is at risk of failing," the authors point out warning signs including: no evidence that the school will start with a sound financial foundation and no plans to hire a management organization to run the school. Fees for these services will be 10% of revenue but contractually limited to provide for surpluses of \$15,000 to \$55,000 in years 1-5, before GCC is paid any funds at all. This provision requires, in essence, that GCC is paid only after all budgeted expenditures are paid or only if minimum surpluses are projected to be realized.

Our board will set contract authorization levels, and recognize the need for conflict of interest avoidance, for itself and for the Principal. So all commitments exceeding predetermined amounts will require approval at different levels with the appropriate assignment of contract accountability placed also, to ensure the school receives the services and products contracted for and at the correct price.

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

Our mission, purposes, and academic goals include rigor and high expectations. We will be accountable for measurable student achievement results and provide expanded choices in the types of education available in public schools. We also want to mirror the demographics of the LEA in our enrollment to the extent possible.

To provide an expanded choice in the type of educational opportunities in public education we will provide a Core Knowledge curriculum using a classical education model of instruction. The cost of the curriculum and the attendant training is \$36,000, or almost \$250 per student alone in year one.

To achieve our desire to mirror the LEA's demographics we recognize that our enrollment will include a large percentage of students from households with lower incomes. So, our first objective is to let people know about the opportunity our free public charter school offers. Although we have only budgeted \$2,400 for marketing (for 144 students) we have already begun a media campaign to become known. Articles about our school plans have been in the local newspapers, we have presented to the Montgomery Board of County Commissioners, started a Facebook campaign (Facebook.com/TilleryCharterAcademy), and have a website, tillerycharteracademy.org. We plan to meet with church leaders and community leaders to get our word to those less likely to hear about us, including a public information event at the Montgomery County Partnership for Children offices held last month.

In addition, these students need a way to get to our school. We have budgeted \$50,000 for contract or purchased buses. To offer a healthy meal at cost, we have budgeted \$30,000 for student meals. We will provide any student qualifying for FRL no cost meals. If half apply then at \$3 per meal, subsidized in part by paying students (\$10,000), our budget will work. Because of a need for supporting our English Language learners we have

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budgeted \$15,000.

To hold our school accountable to the parents by meeting measurable student achievement results our goals and our assessments will measure baseline and formative data, communicated to parents, to honor our commitment to this purpose.

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.

One of our financial goals in the earlier part of the application calls for us to save a minimum of \$30,000 per year for the first three years to accumulate a fund and cash balance of \$90,000. In addition to an annual budget which we have included in this section of the application, we will employ a monthly budget, taking into consideration that often LEA funds are delayed for new charters, that EC funds are deferred for several months, and that we may incur expenses before opening that must be repaid with local funds only. We understand that because our charter enrollment and thus revenue will be small, the financial management is even more critical and the need to build a fund balance will be paramount.

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

The Academy will always make lease versus purchase decisions based upon sound economics and professional financial analysis. In the critical initial years of operation, equipment, etc. leases may be required, whereas in subsequent years the Academy will be able to avoid the financing costs.

The initial facilities will be leased, barring any fortuitous donation of land or facilities, with consideration of purchasing between years 2 and 10 as the school builds a surplus to provide equity for financing. There are two ways the lease may be established; one, directly by a transaction between an owner landlord and the Academy. Another, and more recent form of transaction in North Carolina, among new charters, is a transaction including a developer such as Schoolhouse Development, American Charter Development, HighMark, or other partner. These companies assist charters in locating facilities and then purchasing them and with term leases back to the charter, and in most cases, an attendant agreement that the charter will purchase the facility at a designated time with predetermined formulas for the buy out. Many of the agreements add a provision that the developer/lender will later provide a new facility after the term lease of the initial facility.

Other arrangements involve the USDA which would be able to loan funds at low rates for a Montgomery County charter school as well as municipal bond financed projects which are becoming more popular for schools with a proven track record.

Some items such as office printers/copiers, etc. may be leased. The Academy will, however, have the option of deferred payments or leases of various other items in the budget but only if the enrollment targets are not met.

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 Academy will solicit donations of goods and services upon receipt of acceptance of its application in addition to an aggressive Montgomery County business fundraising campaign and grant request project.

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?

Basics of good internal control are the foundation for the reliability of the financial statements and are needed to safeguard the resources of the school. Not only is the Academy at risk of losing valuable resources with poor controls but there is more at risk. That is the potential for negative publicity associated with any event that might attract notoriety including financial theft or even financial mismanagement. This also often brings a stigma to other charter schools, or indeed to the whole North Carolina charter program and its attendant regulation.

We will contract with our CPA, Potter & Company, to provide the annual audit but in addition we will request from them an initial report on our internal controls. This will include an evaluation of our controls before we open our school so that any weaknesses are discovered and corrected before the school year begins. The audit findings are due 15 months after school opens and that could be too late.

The DPI required services of the LINQ system will be included in our business services agreement with Goodall Consulting. Outsourcing LINQ and all the financial services, create another level of cash segregation by its external accounting for our pupil funds, accounts payable, and payroll.

Internally, we will keep a petty cash fund for emergencies and use a system requiring a paid receipt and/or authorization for expenditures. Approval of expenditures over a recommended amount will require the signature of the Principal. School issued checks will be limited to a maximum of 10 per month requiring almost all transactions to flow through the LINQ reporting initially rather than after the fact.

Accounting records will be safeguarded by use of daily locked files and to the extent practical, secure online records with appropriate password protections. Sensitive records will be systematically shredded as necessary. The board treasurer will provide a financial statement to include a statement of fund balances (balance sheet) and a statement of receipts and expenditures (a P&L) and a budget report at each regularly held board meeting and an explanation to board members for questions. Additionally, the business services provider and periodically the auditors will be asked to attend board meetings.

As a guide we are adopting a 6,908 word "Statement of Financial Policies" we have been allowed to use by Union Day School.

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

There are no related party transactions known or anticipated. We have no board members seeking subsequent employment or any contract for goods or services.

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ATTRIBUTION: Although there have been several contributing to this application, the Goodall Consulting team members assisting have used portions of previous charter applications in this application, including portions from Anson Charter Academy and Monroe Charter Academy, both with permission. Tillery Charter Academy's education plan, including using a classical approach and the Core Knowledge curriculum, and other parts of this application, are modeled after Anson Charter Academy and Monroe Charter Academy and thus this charter application will have much of the same language.

We know of no other relationships needing clarification or attention.

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

We are planning to use the firm of Potter & Company. They are at 434 Copperfield Blvd. Suite A in Concord, NC. The telephone is 704-786-8189 and the facsimile number is 704-786-4447. This firm performs audits for Corvian Community School, Lake Norman Charter, Gray Stone, Community School of Davidson, and Union Day School. Fee \$9,000.

(All rights to this application other than to the state of North Carolina are reserved (c) 2017 Tillery Charter Academy)

Section VI: Financial Plan Concerns and Additional Questions	Reviewer	Page Reference
Assuming that EC Director will cover the full EC caseload for years 1 and 2?	Jonathan Bryant	Personnel Bu
***The personnel budget does not account for the additional teacher assistant in the first year. It was stated earlier in the application that Kindergarten would have 2 teacher assistants in the first year while the other grades shared a floating teacher assistant.	Kebbler Williams	Personnel Bu
***What are the non-categorized expenses? ***Where is the contract with Goodall Consulting reflected in this budget?	Kebbler Williams	Operations B
What are Non-Categorized Expenses? Is \$2,500 going to cover Legal Fees? Is \$12000 Technology Equipment and Capital Assets going to be enough for the schools needs? Where is the money for the Core Knowledge Curriculum?	Shannon Sellers	Operations B
Student transportation appears to be a contract with a vendor, as there are no bus driver salaries budgeted. Core Knowledge resources are fairly expensive, not sure if \$18,000 will cover this in addition to the other resources listed. LINQ is approximately \$3,000/year and PowerSchool is free - this appears to reflect a significant "Operations Contract."	Jonathan Bryant	Operations B
legal fees realistic? would like to see higher marketing in year 1 why the increase in comms cost increasing over years?	Amy Ruck Kagan	Operations B
You may want to consider increasing your contracted services line item for EC.	Glenn Allen	Operations B
***How will the board build revenue prior to receiving its first allotment from the State and local LEA? ***The applicant's response implies that if students who pay the full cost for lunch don't amount to a \$10,000 profit to help defray the costs for students who receive free or reduced-price lunches, then the budget will not work. What is the applicant's contingency plan in this case? ***What are the procedures for the selection of contractors and large purchases?	Kebbler Williams	Budget Narra
Very unclear as to the agreement with Goodall Consulting. Still not sure that Tillery has established need and demonstrated that a classical education is desired by the targeted population.	Jonathan Bryant	Budget Narra
Limiting school checks to a max of 10/month, this seems very low. Is this intended as an internal control? "Sensitive records will be shredded as necessary" - is the Board aware of document retention requirements?	Jonathan Bryant	Financial Au

Reviewer	Score
Alex Quigley	
Sherry Reeves	Fail
Shannon Sellers	Fail
Phyllis Gibbs	
Kristen Parker	Pass
Kebbler Williams	Fail
Tammi Sutton	
Lindalyn Kakadelis	
Joe Maimone	Pass
Jonathan Bryant	Pass
Kenneth Tucker	
Amy Ruck Kagan	Pass
Glenn Allen	

VII AGREEMENT PAGE

Application Fee:

Pursuant to § 115C-218.1(c) the charter school applicant must submit a \$1000 application fee to the Office of Charter Schools. The applicant must submit their application fee by the September 19, 2016 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 19, 2016 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-218.1(c).

arodriguez2187

Date: 09/19/2017

Applicant Signature:

The foregoing application is submitted on behalf of Tillery Charter 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. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy TCS-U-013 All new nonprofit boards receiving a charter must participate in a year-long planning program prior to the charter school's opening for students. The planning year provides an applicant time to prepare for the implementation of the school's curricular, financial, marketing, and facility plans. During this planning year, regular meetings are held with the Board of Directors and consultants from the Office of Charter Schools to provide information on the following topics: school opening plans, staff development, finance, governance, board training, marketing, policies and procedures, securing a school site, and hiring a school administrator. Final approval of the charter will be contingent upon successfully completing all of the planning program requirements.

Print/Type Name: arodriguez2187

Board Position: Christine Fisher, Board Chair

Signature: _____

Date: 09/19/2017

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

Notary Public

Official Seal

Tillery Charter Academy - Our mission is to provide a rigorous classical education with high academic and personal expectations, that inspires students to be productive and thoughtful citizens in their communities and beyond.

My commission expires: _____, 20_____.

OVERALL ASSESSMENT

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.

Total External Evaluator Votes	
No	Yes

Would you, as a subcommittee , recommend an interview for this application? Remember that a subcommittee is not a quorum of the whole Advisory Board and has no authority to bind the Advisory Board to a particular recommendation. This rubric, and the following recommendation, is simply a starting point for Advisory Board deliberations regarding which applicants to invite back for an interview.

Total Subcommittee Votes	
No	Yes

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.

CSAB Votes	
No	Yes

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

Initial Screening

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Mission, Purposes, and Goals	- craig_tucker
Education Plan	- craig_tucker
Governance and Capacity	- craig_tucker
Operations	- craig_tucker
Financial Plan	- craig_tucker
OVERALL	- dtsmith840 - craig_tucker - craig_tucker

External Evaluator	
Mission, Purposes, and Goals	<u>Mission Statement</u> Applicant needs to clarify: What is meant by a "classical education?" - kzparker718 <u>Mission Statement</u> The mission is based on a "classical education," but this is not further described nor detailed in the description. - shannon1974 <u>Educational Need and Targeted Student Population</u> ***The applicant has not demonstrated an educational need for this school. Just because there are no other charter schools in Montgomery County, that is not sufficient evidence of a need to open a new school, especially with only 50 parents indicating interest to date. As for the performance of Montgomery County Schools...In 2016-17, there were 5 schools that contained grades 3-5. All 5 schools met or exceeded growth and all 5 schools have a School Performance Grade of C, which is equivalent to 44.2% of elementary schools across the state. - kwilliams75 <u>Educational Need and Targeted Student Population</u> Applicant needs to clarify: Why is the board seeking to have a student population as outlined in the application? Does it reflect the overall makeup of the area in which the school is located? What is the board does not achieve this racial makeup? Applicant needs to clarify: How will using Core Knowledge and Saxon Math differ from the local LEA? Applicant needs to clarify: Appendix A1 shares two survey questions but what information was given to the people surveyed? - kzparker718 <u>Educational Need and Targeted Student Population</u> Why was the targeted student population selected? The application does not address a need for the charter school. What rationale for the charter school is there?

	- shannon1974 <u>Educational Need and Targeted Student Population</u> Would like more information on the survey - especially exact number of responses. How many responses were received? Are respondents interested in attending any charter school or a charter school based on a classical education specifically? Is classical education desired in this community? Application does not highlight specific academic issues within the existing district - issues are only referenced in a very general way. - jonathanbryant <u>Educational Need and Targeted Student Population</u> Enrollment is large percentage of overall district Please provide additional rationale as to why the district needs this option - arkagan <u>Purposes of Proposed Charter School</u> Applicant needs to clarify: How will you hold schools accountable to meeting student achievement results? What type of assessments will be used and how will you measure progress each year? This is particularly important starting out as a K-2 school, there will be no state assessment to compare results to. - kzparker718 <u>Purposes of Proposed Charter School</u> How will the school be held accountable for meeting measurable academic achievement? - shannon1974 <u>Purposes of Proposed Charter School</u> Not sure what the applicant means by "classical education." Is there an established desire for this type of education in this area? - jonathanbryant <u>Goals for the Proposed Charter School</u> Applicant needs to clarify: How will the school monitor progress towards academic goals throughout the year? What plans are in place to adjust progress towards goals, if needs arise? Applicant needs to clarify: What is meant by demonstrate understanding of the core values? How will this vary from grade level to grade level? - kzparker718 <u>Goals for the Proposed Charter School</u> Academic goals - clarifying point: will exceed all EOG proficiency results or only on certain tests? Academic Goal #3 - how is this measurable? If the presentation or project is completed then this goal is accomplished? - jonathanbryant <u>Goals for the Proposed Charter School</u> weak academic goals - arkagan <u>Goals for the Proposed Charter School</u> why no MAP goals? - joseph_maimone
Education Plan	<u>Instructional Program</u> How does this program align with the mission of a classical education? You state that is "classical-like." What documentation exist that core knowledge leads to improved student performance? - shannon1974

	<u>Instructional Program</u> ***The applicant did not provide a clear and coherent description of the instructional methods. ***The applicant did not provide documented evidence that the proposed approach will lead to improved student performance for its targeted population. - kwilliams75 <u>Instructional Program</u> Unsure that using a specific curriculum will lead to improved results, this section needs more detail. - jonathanbryant <u>Instructional Program</u> This reads as overly abbreviated and demonstrates little understanding of the actual program Provide detail, rationale, data that shows the validity and success of the program. Provide information that details how the program changes over the grade levels. Provide information about how all learners can access the program. - arkagan <u>Curriculum and Instructional Design</u> ***Has the applicant constructed its calendar based on the following definition of instructional time: "Instructional time is that time during which students are assigned to a teacher for the primary purpose of instruction. Instruction is any activity that leads toward the mastery of specific educational goals as stated in the North Carolina Standard Course of Study and local guides. Though definitely a part of school life, some activities, such as the following, are not considered to be part of instructional time: changing classes, homeroom, lunch, pep rallies, and school dances." - kwilliams75 <u>Curriculum and Instructional Design</u> Is there any concern with 24 person kindergarten classes? - this is significantly higher than traditional LEAs typically. Why is MAP not administered a set number of times? Student readiness from grade to grade is somewhat vague. - jonathanbryant <u>Curriculum and Instructional Design</u> Weak section Calendar appears very traditional and narrative does not provide any detail - arkagan <u>Special Programs and "At-Risk" Students</u> ***What is the applicant's plan to find personnel who speak each English Language Learner's first language to implement the first and second part of the Shurley Method? ***What is the applicant's plan to exit students from ESL services? ***How is the plan for gifted students different from what should be done for all students? - kwilliams75 <u>Special Programs and "At-Risk" Students</u> Applicant needs to clarify: Who will be tasked with providing interventions to students? Will it be the primary teacher or will there be other designated staff members? Applicant needs to clarify: How will students be grouped into the different phases for ELL services in relation to the Shurley Method? Will all students entering at Kindergarten start at the Phase 1? How will you strategically identify where students are and where the best for for them will be? Applicant needs to clarify: What is the specific process that the school will go through to identify academically gifted students? - kzparker718
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	<u>Special Programs and "At-Risk" Students</u> How will students be exited from the ELL program? Are you aware of the ACCESS and WIDA test? How will these test be used? - shannon1974 <u>Special Programs and "At-Risk" Students</u> Unclear how this meets the needs of gifted students. - jonathanbryant <u>Exceptional Children – Identification and Records</u> ***How will the applicant use Child Find? - kwilliams75 <u>Exceptional Children – Identification and Records</u> how is enrollment defined here in relation to legality and IEP/504 designation? How is this information tied to the Tiered Support system? Is money budgeted for EC services/contracts? - arkagan <u>Exceptional Children – Identification and Records</u> What is your process for requesting records and follow up? What is your specific child find process if you receive a referral from a parent, teacher, or outside source? - kevin_allen <u>Exceptional Children – Education Programming</u> ***How will the applicant ensure that the full continuum of EC services are offered at this school? ***How will IEPs be monitored? ***How does the educational plan for serving Exceptional Children align with the overall proposed curriculum, instructional methods, and the school's mission? - kwilliams75 <u>Exceptional Children – Education Programming</u> You discuss multiple accommodations and modifications. How do you plan to deliver Specialized instruction? Are there any specific interventions or strategies that will be employed and progress monitored? - kevin_allen <u>Student Performance Standards</u> Applicant needs to clarify: Will students receive report cards? How will quarterly progress towards proficiency be measured aside from NWEA testing? Applicant needs to clarify: What specific goals will the school have around student proficiency for NWEA testing? Are students expected to be on grade level after each assessment? Will there be a growth goal for every student? Applicant needs to clarify: What specific steps will teachers take when analyzing student data? The application outlines- modifying strategies, but what does that specifically mean? - kzparker718 <u>Student Performance Standards</u> The policy for promotion/retention is vague. What are the standards for promotion and retention? What will be considered progress on NEWA Map testing? - shannon1974 <u>Student Performance Standards</u> ***Why is the board responsible for notifying parents of their children's test results?
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	***The applicant did not specify clear policies and standards for promotion from one grade level to the next nor exit standards for ALL students. - kwilliams75 <u>Student Performance Standards</u> Promotion standards seem vague. - jonathanbryant <u>Student Performance Standards</u> Very low academic goals Office Manager qualifications in order to be helping with data analysis? More detail about School Improvement Team - arkagan <u>Student Conduct and Discipline</u> Applicant needs to clarify: Will discipline methods be the same for all grade levels? How will you account for the difference in age and behavior for Kindergarten and 5th grade? Applicant needs to clarify: How will the core values outlined earlier in the application play a role in student conduct? - kzparker718 <u>Student Conduct and Discipline</u> How will the core values stated in the mission be seen in student conduct? - shannon1974 <u>Student Conduct and Discipline</u> It should be noted that you will provide services to students with disabilities even when there is a change of placement or it the team determines that the behavior is not a manifestation of the disability. - kevin_allen
Governance and Capacity	<u>Governance and Organizational Structure of Private Nonprofit Organization</u> ***How will the board's governance structure and composition help the board to evaluate the success of the school and school leader? ***The applicant mentioned the possibility of adding 2 more board members. What expertise will these new board members contribute? ***What is the plan for ongoing board training and development including a timetable and specific topics to be addressed? ***Are there any existing relationships that could pose actual or perceived conflicts of interest if the application is approved? ***If a grievance is with the principal, what happens during the grievance process? ***How will the governing board and individual board members be evaluated? ***What is the missing Section 5 in Article 5 of the bylaws? What is considered to be a quorum at board meetings? - kwilliams75 <u>Governance and Organizational Structure of Private Nonprofit Organization</u> How will the board be evaluated? If a staff member has a grievance with the principal, how will that be handled? - shannon1974 <u>Governance and Organizational Structure of Private Nonprofit Organization</u> Stacy Bruton did not appear to respond to the question about previous Board experience. PTO reports directly to the Board? This appears to be contrary to most Board's general purposes. How will a parent be added to the Board - after enrollment starts? What is this process? - jonathanbryant <u>Governance and Organizational Structure of Private Nonprofit Organization</u> conflict of interest with Rhonda? - arkagan

	<u>Staffing Plans, Hiring, and Management</u> Applicant needs to clarify: Will the EC director provide ELL services as well? Applicant needs to clarify: A process for hiring is outlined, but how will the school retain high performing teachers? - kzparker718 <u>Staffing Plans, Hiring, and Management</u> Who will serve the ELL students, as a position is not denoted in the first year? Will the Curriculum Coordinator also be a full time teacher? The description of the curriculum coordinator appears to be a full time job. How will you retain this highly qualified teacher that is performing 2 full time jobs? - shannon1974 <u>Staffing Plans, Hiring, and Management</u> Criminal background check procedure is not outlined in a detailed manner. - jonathanbryant <u>Staffing Plans, Hiring, and Management</u> ***What qualifications must teacher assistants have to be hired? ***What is the employee's course of action if the grievance is with the principal? ***What is the plan for having qualified staff for English Language Learners? ***Is it reasonable to expect that a core content teacher will also be the Curriculum Coordinator? The duties described for this position require someone who can be dedicated to them full-time in order to be most effective. - kwilliams75 <u>Staffing Plans, Hiring, and Management</u> More detail on recruitment and retention of school staff- what the interview will look like, ways to recruit, timeline, etc. - arkagan <u>Staff Evaluation and Professional Development</u> Applicant needs to clarify: Will the Principal have enough capacity to maintain teacher licensure and provide appropriate PD for teachers? Applicant needs to clarify: How will the proposed methods of professional development support teachers internalization of the Core Knowledge and Saxon Math curriculum? 3 days are outlined at the beginning of the year for this but what will on going PD look like? - kzparker718 <u>Staff Evaluation and Professional Development</u> Is three days of Professional development enough to thoroughly train teachers on Core Knowledge, Saxon Math, and core values? Can the principal effectively provide the Professional Development for teachers as well as maintain licensure requirements? - shannon1974 <u>Staff Evaluation and Professional Development</u> Which evaluation tool will be used for teachers? Core Knowledge typically requires significant PD to achieve fidelity, this plan only allocates 3 days. As a "classical" school - is there any thought to specific PD with regard to this? - jonathanbryant <u>Marketing Plan</u> This plan seems fairly minimal. - jonathanbryant <u>Marketing Plan</u> ***What are the applicant's plans to achieve a reasonable reflection of the racial/ethnic
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	and other demographic composition of Montgomery County Schools? - kwilliams75 <u>Parent and Community Involvement</u> How will business owners, community leaders and parent "help to live out these values? What is the expectation for these 3 groups? - shannon1974 <u>Parent and Community Involvement</u> No mission information is currently on website. - jonathanbryant <u>Parent and Community Involvement</u> ***What is the plan for building engaging partnerships between the family and the school that strengthen support for student learning? - kwilliams75 <u>Admissions Policy</u> There is only a meeting with those that wish to withdraw because of transportation? - jonathanbryant <u>Projected Student Enrollment (Table)</u> concern about high % of local LEA enrollment. - joseph_maimone
Operations	<u>Transportation Plan</u> IF the school is going to be in Montgomery County, why are coordinating with Anson County in regards to car traffic? - shannon1974 <u>Transportation Plan</u> ***Why does the board predict that at least 50% of its students will qualify for free or reduced-price meals? ***Why does the board intend to coordinate a car traffic stacking plan with Anson County when the school is going to be located in Montgomery County? - kwilliams75 <u>Transportation Plan</u> How will you provide transportation to students that have special transportation identified as a related service on their IEP? - kevin_allen <u>School Lunch Plan</u> Applicant needs to clarify: How will you ensure this process runs smoothly? Having lunch provided on some days and not on others seems to potentially be confusing for parents and families. - kzparker718 <u>School Lunch Plan</u> What is a cold meal? Earlier in the application, you estimate that 50% of your population will receive Free/Reduced Lunch, will the "mark-up" on the vendor meals and the cold meals be enough to cover the cost for these students' daily meals? How many days will vendors be present, and will this be confusing to parents and students as to when lunch will be served? - shannon1974 <u>School Lunch Plan</u> Why "selected days" for vendor lunches, why not all school days? "Cold lunch?" - jonathanbryant <u>School Lunch Plan</u> ***Of what will a "cold meal" consist? - kwilliams75 <u>Facility and Facility Contingency Plan</u>

	How does \$7-8/sq foot compare to other properties in the area? - jonathanbryant <u>Facility and Facility Contingency Plan</u> plans regarding contingency do not include where to place modulars - arkagan <u>Facility and Facility Contingency Plan</u> ***How does \$7-8 per square foot compare to other commercial and educational spaces in Montgomery County? - kwilliams75
Financial Plan	<u>Personnel Budget: Expenditures 2018-2023 (Table)</u> Assuming that EC Director will cover the full EC caseload for years 1 and 2? - jonathanbryant <u>Personnel Budget: Expenditures 2018-2023 (Table)</u> ***The personnel budget does not account for the additional teacher assistant in the first year. It was stated earlier in the application that Kindergarten would have 2 teacher assistants in the first year while the other grades shared a floating teacher assistant. - kwilliams75 <u>Operations Budget: Expenditures 2018-2023 (Table)</u> What are Non-Categorized Expenses? Is \$2,500 going to cover Legal Fees? Is \$12000 Technology Equipment and Capital Assets going to be enough for the schools needs? Where is the money for the Core Knowledge Curriculum? - shannon1974 <u>Operations Budget: Expenditures 2018-2023 (Table)</u> Student transportation appears to be a contract with a vendor, as there are no bus driver salaries budgeted. Core Knowledge resources are fairly expensive, not sure if \$18,000 will cover this in addition to the other resources listed. LINQ is approximately \$3,000/year and PowerSchool is free - this appears to reflect a significant "Operations Contract." - jonathanbryant <u>Operations Budget: Expenditures 2018-2023 (Table)</u> legal fees realistic? would like to see higher marketing in year 1 why the increase in comms cost increasing over years? - arkagan <u>Operations Budget: Expenditures 2018-2023 (Table)</u> You may want to consider increasing your contracted services line item for EC. - kevin_allen <u>Operations Budget: Expenditures 2018-2023 (Table)</u> ***What are the non-categorized expenses? ***Where is the contract with Goodall Consulting reflected in this budget? - kwilliams75 <u>Budget Narrative</u> Very unclear as to the agreement with Goodall Consulting. Still not sure that Tillery has established need and demonstrated that a classical education is desired by the targeted population. - jonathanbryant <u>Budget Narrative</u> ***How will the board build revenue prior to receiving its first allotment from the State and local LEA? ***The applicant's response implies that if students who pay the full cost for lunch don't

	amount to a \$10,000 profit to help defray the costs for students who receive free or reduced-price lunches, then the budget will not work. What is the applicant's contingency plan in this case? ***What are the procedures for the selection of contractors and large purchases? - kwilliams75 <u>Financial Audits</u> Limiting school checks to a max of 10/month, this seems very low. Is this intended as an internal control? "Sensitive records will be shredded as necessary" - is the Board aware of document retention requirements? - jonathanbryant
OVERALL	

<u>Charter School Advisory Board Subcommittee</u>	
Mission, Purposes, and Goals	
Education Plan	
Governance and Capacity	
Operations	
Financial Plan	
OVERALL	

<u>Overall Summary</u>	
Initial Screening 09/27/2017	The Office of Charter Schools deemed this application complete on September 27, 2017. No further information is needed to begin the application evaluation.
Application Review	OCS provided a brief overview of the proposed application including proposed county, proposed enrollment for the first five (5) years, and if the application had an LEA impact statement and/or due diligence. Additionally, the pass/fail ratings from the application rubric were shared. Assistance was provided by Goodall Consulting and the applicant indicated that they did not pay a fee to the third party. Mr. Maimone led the Performance Committee in the application review. He opened with a concern around enrollment and how the school will open with 15% enrollment of Montgomery County schools, which is already a high performing district. He commented that he would like to see very convincing evidence of that prior to moving to full

	interview phase. Mrs. Reeves asked whether the intent is just to operate as a K-5 school, and recognized the following may be an interview question, but, how is the rigorous classical education mentioned in the mission laid out in the education plan. Mr. Maimone noted that it may be known that Core Knowledge is essentially classical education. Mrs. Kakedelis had a clarification around the proposed LEA and whether the board just approved a charter to open in Anson county. Mr. Maimone inquired why there were not any MAP goals defined since MAP is one of their core assessments. Mrs. Reeves asked around the specific process for identifying AIG students as it was not clear in the application. Mr. Maimone commented that the question may be more in line with an interview question. Mr. Maimone asked if anyone on the Performance Committee found any convincing survey responses. The Performance Committee members responded that they had not found that information in the initial application. Mrs. Reeves commented that the marketing plan was scant. Mr. Maimone asked a member of the board to address how they can convince 15% of students from a successful LEA to come to their charter school. The Board responded that Montgomery County has met or exceeded growth, but their proficiency is low with around 55% not meeting proficiency. The Board has identified that there is a need present. When the school first applied, they had 50 surveys completed and have now 112. Mr. Maimone asked how they constructed their target numbers. The Board responded that this was a goal they felt they could meet and be successful based on survey and interest meetings held. Mr. Maimone responded that when we look at a new charter school looking to gain 10 or more percent of the LEA, we need some hard evidence. He stated if the school were to be invited back to the full interview they will need some convincing survey data and information. He commented that year after year we see that schools cannot make those enrollment projections. Mr. Maimone asked the Board to talk about the classical education and how they plan to market this to families. The Board responded that they wanted to focus on the grammar portion of classical education in order to build on foundations. Mr. Maimone asked further clarification on how this ties to marketing. The Board responded that they plan to use this data to present the benefits to potential families. The Board clarified the question regarding the "Anson" under the transportation section and responded that this was simply a typo. Mrs. Reeves made a motion that the Performance Committee make a recommendation to the full board that the applicant be invited for a full interview. Mrs. Kakedelis seconded. The motion passed unanimously within the Performance Committee. Mr. Maimone made a motion on behalf of the Performance Committee that the full board recommend Tillery Charter Academy for full interview. Mr. Walker Seconded. Mrs. Kroeger stated that since the school is attempting to recruit 15% of the LEA enrollment, the budget is very tight and the projected surplus is very small.
Application	

Interview	
OVERALL	