





Organization Information

Organization Name *

Trinitas Classical Academy

Telephone

15206317400

Fax

Address

1431 Mecklenburg Highway

Unit/Suite

Zip Code

28115

City

Mooresville

State

North Carolina

Primary Contact Name *

Joe Higgins

Opening Year *

2025

Is Management Organization Used

Yes No

Primary Contact Relation To Board *

Curriculum Vendor

Management Organization Name

Management Organization Contact Name

Primary Contact Email *

joe@joehigginsinc.com

Management Organization Phone

Primary Contact Phone *

15206317400

Management Organization Email

PrimaryContact Address *

1431 Mecklenburg Highway

Unit/Suite *

Zip Code *

28115

City *

Mooresville

State *

North Carolina

Board Members Roster

Name	Street Address	Zip Code	Email	Expertise
Joe Higgins	4502 N Heatherwood Pl	85718	joe@joehigginsinc.com	Classical Education
Mikail Clark	214 North Tryon Street	28202	mclark@jahlaw.com	Law



Name	Street Address	Zip Code	Email	Expertise
Judge Marcus Long	1954 Brawley School Rd	28177	longmarcus50@gmail.com	Juvenile Justice
Dr. Walter Tribolet	17600 Westward Reach Rd	28031	walter_tribolet@yahoo.com	Businesss (International)
Mark Lockman	119 Palos Verde Dr.	28117	mlockman@rlwest.com	Education Administration
Susan Tillis	16116 North Point Road	28078	tillis.susan@gmail.com	Policy - Non-Profit
Anthony Famiglietti	109 Alexandria Dr	28115	runfam@protonmail.com	Athletics - Arts
Will Bowen	117 W Morehouse Ave	28117	jwbowen1745@gmail.com	Policy



1. Application Contact Information

Q1. Name of Proposed Charter School

Trinitas Classical Academy

Q2. Primary Contact's Alternate Telephone Number (xxx-xxx-xxxx)

- The primary contact will serve as the contact for follow-up, interviews, and notices regarding this Application

Joe Higgins 520-631-7400

Q3. Geographic County in which charter school will reside

Iredell County

Q4. LEA/District Name

Iredell School District

Q5. Zip code for the proposed school site, if known

28115

Q6. Was this application prepared with the assistance of a third party such as a consultant or Charter Support Organization (CSO)?

I. Definition - Charter Support Organization (CSO)

A for profit or nonprofit, nongovernmental entity that provides:

a. assistance to developers during the application, planning, program design, and initial implementation of a charter school; or

b. technical assistance to operating charter schools, including specific and limited services such as but not limited to professional development, nonprofit board development, payroll, and curriculum development.

Yes

No

Q7. Give the name of the third-party consultant or CSO:

None

Q8. Describe any fees provided to the third-party person or CSO as reflected in the budget.

None

Q9. Provide a full detailed response of the assistance provided by the third-party consultant or group while preparing this application and when the assistance will end:

There are no third party consultants or groups preparing this application.



Applicant Comments :

None

Applicant Evidence :


No Consultants.docx

Uploaded on **4/25/2024** by **Joe Higgins**

Q10. Projected School Opening Month

August

Q11. Will this school operate on a year-round schedule?

- Yes (Year-Round)
- No

Q12. Complete the Enrollment Summary table (see resources), providing grade levels and total projected student enrollment for Years 1-5. Please note: If applying as a "FACE VIRTUAL" remote academy, the applicant must provide separate enrollment figures for in-person and remote student cohorts (see resources).

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1

Resources


Enrollment Summary Table_...

Applicant Evidence :


Enrollment Summary Table ...

Uploaded on **2/8/2024** by **Joe Higgins**

Q13. At full capacity, what is your estimated student enrollment and grade spans?

At full enrollment we anticipate 884 students in Kinder to 8th grades.

Q14. Complete the Enrollment Demographics table (see resources), providing projected enrollment for each of the following demographic groups.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 1

Resources


Enrollment Demographics T...



Applicant Evidence :


Enrollment Demographics T...

Uploaded on **2/8/2024** by **Joe Higgins**

Q15. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan outlined above.

In the first year, we will reserve 78 seats for each grade up to the 5th grade. The full capacity will be 104 students per grade, allowing for 4 sections for each grade. We expect an increase in enrollment for the upper grades (6th to 8th) in the following years. Our team's experience indicates a strong demand for enrollment from Kindergarten to 3rd grade, with students progressing from grade to grade and additional enrollment from transferring students in the area and increasing migration each year. Our marketing budget, detailed in the operational budget, is designed to achieve these enrollment targets. (Grade and year projected enrollment attached).

Applicant Evidence :


Q15 Enrollment and Growth...

Uploaded on **2/8/2024** by **Joe Higgins**

Q16. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- I certify
- I do not certify

Q17. Explanation (optional)



2. Non-Profit Corporation Information

Private Non-profit Corporation (NCGS 115C-218.1)

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

Q18. Organization Type

- Non-Profit Corporation
- Municipality

Q19. Official name of the private, non-profit corporation as registered with the NC Secretary of State

- This is the entity that will hold the Charter if final approval is granted by the NC Charter Schools Review Board (CSRB).

Classical Education Schools of North Carolina

Q20. Has the organization applied for 501(c)(3) non-profit status?

- Yes
- No

Q21. The private non-profit listed as the responsible organization for the proposed charter school has 501(c)(3) status:

- Federal Tax-Exempt Status (NCGS 115C-218.15)
- If the non-profit organization has yet to obtain 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.

- Yes
- No

Applicant Comments :

The board has applied to the Internal Revenue Service and is awaiting authorization for 501(c)(3) status.

Q22. Attach as Appendix F Federal Documentation of Tax-Exempt Status

- Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 10

Applicant Comments :

Our federal IRS - Tax Exempt Status has been applied for on January 31, 2024 using their expedited service. Attached is the receipt of the submission.



Applicant Evidence :


Gmail - Fwd_ Pay.gov Payme...

Uploaded on **4/17/2024** by **Joe Higgins**

Q23. Name of Registered Agent and Address

- As listed with the NC Secretary of State

Kevin C. Donaldson at 149 Welton Way, Mooresville, NC 28117

Q24. Federal Tax ID

93-4570912



3. Acceleration

Per NC Administrative Code 16 NCAC 06G .0509 (<https://simbli.eboardsolutions.com/Policy/ViewPolicy.aspx?S=10399&revid=84R1LVelxY9lvhpKdhHt1w==&ptid=muNUIKiR2jsXcslsh28JpBkiw==&secid=x9VPtMUo9twbb6Q1kKyM7A==&PG=6&IRP=0>), the State Board of Education, in its discretion, may accelerate the mandatory planning year to increase the number of high-quality charter schools.

Q26. Requirements

The State Board of Education may accelerate the mandatory planning year for a charter applicant that meets the following requirements:

- (1) agrees to participate in the planning year while the charter application is being reviewed without any guarantee of charter award; and
- (2) demonstrates that there is a facility identified by the applicant that is feasible for opening on an accelerated schedule. Do you want your application to be considered for acceleration?

- Yes
- No

Q27. Does your board agree to participate in the planning year while the charter application is being reviewed without any guarantee of charter award?

- Yes
- No

Q28. Explain how the facility, identified by the applicant, is feasible for opening on an accelerated schedule?

- Yes
- No

Applicant Comments :

The Trinitas Classical Academy will be located in the Mt. Mourne school. The school was sold in 2021 to a real estate professional (Rick Howard) who has a three-generation alumni relationship with the campus. The Iredell School District operated the school for 75 years, with a successful International Baccalaureate school model on campus. There were 775 students enrolled, and all requirements to operate (life safety, building codes, etc.) were in place and remain in place.

The landlord will have to commence maintenance, security, IT, and other upgrades to build the school to the specifications of the Classical Education model. Details of the upgrades, traffic mitigation, and security improvements will be included in this application.

The lease and occupancy costs are detailed in this application.

Q29. Demonstrate in narrative form, that the facility identified by the applicant is feasible for opening on an accelerated schedule.



The landlord will have to commence maintenance, security, IT, and other upgrades to build the school to the specifications of the Classical Education model. Details of the upgrades, traffic mitigation, and security improvements will be included in this application.

The lease and occupancy costs are detailed in this application.

The feasibility of opening a K-8 school campus facility involves several key considerations:

IT Upgrades

The school will be equipped with modern IT infrastructure to support digital learning. This includes high-speed internet connectivity and a robust network infrastructure. The IT upgrade will also support online learning. The current IT infrastructure will be analyzed and supplemented as needed.

Security Enhancements

The safety of students and staff is paramount. The school will be equipped with modern security systems, including surveillance cameras, access control systems, gates and fencing, and emergency response systems.

Traffic Patterns

The school's location and design will take into account traffic patterns to ensure smooth drop-off and pick-up of students. This includes adequate parking, separate lanes to accommodate multiple drop-off and pick-up locations, stacking on sight, and safe pedestrian paths.

Play Structures

The school will add modern play structures that are safe and suitable for children in the early grades. These structures will be designed to promote physical activity and social interaction among students.

HVAC System

The school will be equipped with a modern HVAC system to ensure a comfortable learning environment. The HVAC system will be energy-efficient and comply with local building codes.

Food Service

The school will have a modern kitchen and dining area to provide healthy meals for students. The food service plan will comply with local health and safety regulations, which are detailed in this application.

Life Safety

The school will comply with all local municipality codes related to life safety. This includes fire safety systems, emergency exits, and safety drills.

Q30. Attach as Appendix A1 Acceleration Evidences to demonstrate that you have a facility secured for opening on an accelerated schedule.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Comments :

Attached is the negotiated lease, a letter from Dr. Kenny Miller on the upgrades that have been done or will be done to the building prior to occupancy, and photos of the campus.



Applicant Evidence :


Trinitas - Mr. Mourné Lease ...


Mt Mourné Campus Photos....

Uploaded on **4/17/2024** by **Joe Higgins**

Uploaded on **4/17/2024** by **Joe Higgins**

Q31.The State Board shall also consider the presence or absence of evidence of the following eight (8) factors in making its determination of whether to accelerate a planning year: (1) whether the mission and educational program outlined in the nonprofit board's application will provide parents and students with different educational opportunities than are currently available in the area;
(2) whether local, state, or national nonprofit partnerships have committed to assisting the school;
(3) whether the school will contribute to potential for economic and educational development of the region;
(4) whether an organization that has experience in creating public schools is mentoring the applicant;
(5) whether obstacles to educational reform efforts leave chartering as an available option;
(6) whether an existing charter school board has agreed to mentor the applicant;
(7) whether the nonprofit corporation has existed for more than two years; and
(8) whether the proposed board has previously operated or currently operates a public charter school. Please confirm that you understand the above accelerated factors.

- Yes
- No

Q32.Factor (1) Describe your school's unique mission and educational program.



As detailed in this application, Trinitas Classical Academy is an important option for addressing diverse parental needs. Trinitas Classical Academy is built on the time-tested Classical education model which matches academic rigor and a focus on character development and Social and Emotional Learning. There are currently no Classical options and charter schools within a 12 to 20-mile radius of our proposed geographic area.

Education Philosophy: The proposed school will be built around the Classical Education pedagogy and include hands-on, student-centered learning as modeled by 18th-century educator Charlotte Mason. The Trinitas Governing Board believes in the merits of a Classical Education program focusing on rigor, character education, Social & Emotional Learning (focused character education), and high expectations. During their organizational and planning meetings, the board identified the Mooresville area as an opportunity to open a school that serves families from diverse backgrounds. The team is working with a school leader and has built a team that can execute all academic, financial, and operational performance measures the State of North Carolina put forth.

The Governing board is committed to building a school with the following framework as a guide:

- An environment where teachers, support staff, and administrators lead by example and model what is good, true, and beautiful. Our campus will work to foster meaningful student-faculty-parent interaction in alignment with the Adlerian philosophies of Dr. Rudolf Dreikurs and Dr. William Glasser, which focus on the power of relationships.
- A time-tested, standards-aligned curriculum that is designed to the needs, strengths, abilities, and learning style of each student to maximize student achievement;
- An environment reinforcing the Charlotte Mason philosophy that every individual has a unique potential that can be developed while understanding that not every student can be successful all of the time;
- An open and receptive learning atmosphere built on the Trivium of learning that naturally progresses from direct instruction and memorization (Grammar stage), to the building upon foundational knowledge and into the ability to build claims and defend positions through written and verbal skills (Logic and Rhetoric stages);
- Instructors that receive continuing education on the delivery, planning, academic, and emotional benefits of a Classical education.

Trinitas and Classical Education: *“Classical education depends on a three-part process of training the mind. The early years of school are spent absorbing facts and systematically laying the foundations for advanced study. In the middle grades, students learn to think through arguments. In the high school years, they learn to express themselves. This classical pattern is called the Trivium. A classical education is more than simply a pattern of learning, though. Classical education is language-focused; learning is accomplished through words, written and spoken, rather than through images (pictures, videos, and television). Why is this important? Language-learning and image-learning require very different habits of thought. Language requires the mind to work harder; in reading, the brain is forced to translate a symbol (words on the page) into a concept. Images, such as those on videos and television, allow the mind to be passive. In front of a video screen, the brain can sit back and relax; faced with the written page, the mind must roll its sleeves up and get back to work.”*[1] The first eight years of education consist of two repetitions of the same four-year pattern: Ancients, Middle Ages to Reformation, Founding of America, and Modern Times. In a traditional Classical Model, the child studies these four time periods at varying levels — simple for grades 1-4, more difficult in grades 5-8 (when the student begins to read original sources), when the student works through these time and also has the opportunity to pursue a particular interest (music, dance, technology, medicine, biology, creative writing) in depth. This pattern lends coherence to studying history, science, and literature — subjects that are too often fragmented and confusing. The pattern widens and deepens as the student progresses in maturity and learning. Classical education is, above all, systematic — in direct contrast to the scattered, unorganized nature of secondary education. This systematic, rigorous study has two purposes.[2]

Trinitas and Classical Education and Relationships **The foundations of the Trinitas and Classical Education culture are based on research by Dr. Rudolf Dreikurs, an Adlerian psychologist, whose life work suggested that human misbehavior is the result of feeling a lack of belonging to one's social group.** When this happens, the child acts from one of four "mistaken goals": undue attention, power, revenge, or avoidance (inadequacy). Dreikurs' overall goal was that students would learn to cooperate reasonably without being penalized or rewarded because they would feel that they are valuable contributors to the classroom.[3] This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of the academic and life success of the scholar. To simplify the theory, the Teddy Roosevelt quotation is: *‘People won't care how much you know until they know how much you care.’*



Continuing with Dr. Dreikurs's theory, Dr. William Glasser laid out Choice Theory[4], which is the idea that the behavior of children is related to five basic needs: survival, love and belonging, power and significance, freedom and autonomy, and fun. Both Dreikurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success.

Dr. Dreikurs

1. Always Speak in positive terms, and never be negative
2. Encourage students to strive for improvement, not perfection
3. Emphasize student strengths while minimizing weaknesses.
4. Help students learn from mistakes, which are valuable in learning
5. Encourage independence and the assumption of responsibility
6. Encourage students to help each other
7. Be optimistic and enthusiastic – a positive outlook is contagious.

Dr. Glasser and Choice Theory

1. Stress Student Responsibility
2. Set Classroom Rules
3. Teach Students to Make VALUE JUDGEMENTS
4. Suggests Reasonable ALTERNATIVES – lay out CONSEQUENCES
5. Be CONSISTENT and REVIEW your STRATEGY often

These foundational elements (Classical/Trivium, Charlotte Mason, Drs. Dreikurs, and Glasser) permeate our teacher training and expectations, our school leadership beliefs, our board governance, and classroom activities.

Mooreville, NC. - Location Rationale: The Trinitas Governing board is proposing one campus to open in August of 2024. The governing board's research and experience have shown that the location is ideal for the model being proposed. The rationale for the location and the model includes:

1. There are very few if any, public school options for the families of the proposed geographic area. **The nearest K12 public charter is 1 mile south of our proposed school location. Pine Lake Preparatory has a verified wait list of 4,028 students.**
2. The focus on academic rigor and social-emotional learning found in the Classical Education model matches the unique aspects of the area.
3. The *Strong Social and Emotional Learning* programming at its foundation is a unique model specially designed for the students of the proposed geographic boundary.
4. The Governing board is proposing a slow ramp-up and growth in enrollment and is being conservative in their estimates for the first three years.
5. The region is growing rapidly ballooning from 22.2% in the past decade. Growth through 2023 in Iredell County is expected to continue at a 23.6% rate. As parents come to the region, choices in schools will become an important draw to the region and existing school capacity is highly limited. [5]

Offering a choice to the families in the geographic area is the goal of the Cato Governing Board. The school choices in the area include expensive private schools or local ISD options. The community is interested in an option that provides a small school experience with academic rigor and a focus on character development combined with a community school model. With the background of the Governing Board and the identified need with high special needs populations, the combined model of public K8 charter and special education service providers.

[1] *What Is Classical Education by Susan Wise Bauer* www.TheWellTrainedMind.com (<http://www.TheWellTrainedMind.com>) <https://welltrainedmind.com/a/classical-education>

[2] *Ibid*

[3] *Rudolf Dreikurs – Wikipedia* - https://en.wikipedia.org/wiki/Rudolf_Dreikurs

[4] William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>



[5] Office of State Budget and Management – North Carolina.

<https://www.osbm.nc.gov/facts-figures/population-demographics/state-demographer/countystate-population-projections/population-growth-2020-2030>

Q33.Factor (2) Describe any local, state or national nonprofit partnerships that have committed to assisting the school.

Leverage community outreach and partnerships: Our Governing Board and Principal have strong relationships with community organizations, religious institutions, and local businesses that serve the target demographic groups. Participate in community events and leverage these partnerships to spread awareness about the school and its offerings.

The following community organizations have been contacted and presented to during the application process. They will be one of our foundations for marketing the school as we go forward:

- **United Way** Brett Eckerman Executive Director—Iredell—Principal Dr. Nutting has a long-standing relationship with the organization and will explore options to assist in our school's enrollment.
- **The Cove Church** - Josh Carosella – Youth Pastor The Cove Church in Mooresville, North Carolina serves about 5,000 people in total on a regular Sunday, with attendance swelling to nearly 10,000 for Christmas and Easter. The Cove is less than a mile from the Mt. Mourne campus and working with the Cove team will help to inform members of the church about our model.
- **Patrick’s Episcopal Church** – Fr. Greg McIntyre – St. Patrick’s is near the Mt. Mourne campus, and they have agreed to volunteer, assist, and support our school's efforts. The church has a pre-school and will help us communicate with those families.
- **Fairview United Methodist Church** – Pastor Nathan Finsel – They are happy to volunteer, share resources, and help market our school. The church has Bee Hive PreK on its property, and they have aided our marketing efforts. Fairview is directly across the street from the Mt. Mourne campus.
- **Community PreSchool of Huntersville** Kyshia Lineberger—Our board has met with their preschool team, and we toured each other's campuses. The community has over 175 preschoolers with whom we are looking to partner. We have agreed to cross-promote each other's schools as they are complementary and philosophically aligned.
- **Ambassador Classical High School** – This Classical Education high school is in our trade area. Our team has been in ongoing discussions with the Ambassador leadership team about ideas and ways to cross-market and support each other's efforts. Given that both models are Classical Education focused, there is a natural synergy for our families. With the North Carolina voucher Opportunity Scholarships in place, this option may be available to some of our families.
- **Athletics** – Our team has met with a number of area athletic clubs and groups. Each is interested in partnering with our school, possibly sharing resources (gymnasium, fields etc.). Including
- **Pre-Schools** We have identified over 20 pre-schools within a 6-mile radius of the Mt. Mourne campus. Our group has made contact with some, but there are many more to connect with. Part of our outreach plan will be to visit and introduce our school to the center directors and explore options for holding private tours for families or marketing to these schools.

Applicant Evidence :

 Ambassador Christian - Lett...	 NCDPI - Miles - Trinitas Lette...	 Comm PreSchool Huntersvil...	 trinitas letter BE.pdf
Uploaded on 4/24/2024 by Joe Higgins	Uploaded on 4/24/2024 by Joe Higgins	Uploaded on 4/24/2024 by Joe Higgins	Uploaded on 4/24/2024 by Joe Higgins
 Rev Finsel - Trinitas Letter.pdf	 ArenaLKN League - Recomm...		
Uploaded on 4/24/2024 by Joe Higgins	Uploaded on 4/24/2024 by Joe Higgins		

Q34.Factor (3) Describe how the school will contribute to the potential for economic and educational



development of the region.



There is a demand for quality schools in the expanding Mooresville/Iredell County area. The Governing Board's discussion with local employers detailed the connection between strong schools, future workforce development, real estate development, and relocation opportunities for area companies.

Mooresville is the home of **Lowes Corporation**, and the proposed campus location is within a mile of the corporate headquarters of this \$100 billion corporation. Key strategic partners to the Lowes chain have located their corporate headquarters in the area and the Iredell County region has seen 20% growth over the last decade and expects 23.6% growth through 2030. Through interviews and presentations to Lowes leadership, having a rigorous, character-based school option was one of the main concerns discovered.

The affiliated business with **NASCAR teams** is also predominant in the Iredell/Mooresville region. Our board will work with various teams to identify partnerships for fundraising, grants, educational connections and family tours for relocating families.

Church outreach has occurred including presentations to **The Cove Church**, located within 3 miles of the campus. The youth minister presented our campus to the leadership and pledged support in notifying families and partnering with the school for events at Trinitas and The Cove.

Various members of the Trintias Governing Board have had preliminary discussions about the proposed school and the education model. The feedback regarding school choice, capacity issues with existing charter schools (Pine Lake Prep K12 is full with a 4000+ student waiting list), and the prohibitive cost of local private school options further demonstrates the viability of the proposed school.

Homeschool Enrollment Research:

North Carolina students that are homeschooled. **Growing. 52%** growth from 87,978 to 179,900 over 10 years (NC Dept of Admin)

With all the excitement and growth and homeschool, states are worried they're going to lose those contact students. Trinitas Classical will intentionally include homeschool families by providing meeting space on the campus, integrating curriculum between the homeschool and campus community, and provide training opportunities for homeschool families.

Our group has done focus groups with homeschool families and learned that Classical Education and Charlotte Mason are the top choices for most participants. Concerns included:

1. Concern about their children keeping up academically.
2. Confusion of building a schedule and following a plan of instruction.
3. Safety and alignment with their families values.

Our integration model will not only provide space but a curriculum platform and access to our grade level teachers for homeschool families to 'follow along' at their own pace. Assessment options will be made available to the homeschool families for standardized testing, or nationally normed testing (NWEA-Map) to identify learning gaps and areas to focus on. Our professional staff will help in identifying special education needs and directing homeschool families towards resources available in the local community.

This hybrid model allows for choice and freedom under the voucher program, while providing families a resource to stay connected to public education. As vouchers expand and population increases, this hybrid model becomes more important in the education landscape.

Workforce Development: Classical charter schools focus on developing students' critical thinking, problem-solving, and communication skills. As classical charter schools focus on a more traditional curriculum, they can provide a unique and innovative educational offering that can attract families and businesses to the region.

Real Estate: Classical charter schools can drive up property values in the neighborhoods where they are located. Families who are interested in enrolling their children in these schools may be more likely to move to the surrounding area, increasing demand for housing and commercial real estate.

Innovation: Charter schools, in general, have more flexibility to experiment with new teaching methods, technologies, and



approaches to education.

Q35.Factor (4) Describe whether an organization that has experience in creating public schools is mentoring the applicant.

Three members of the Trinitas team have extensive experience in public, private, and charter school operations and oversight.

Board Chair - Mark Lockman

Mr. Lockman was the co-founder of Davidson Day School - he served on the board for 6 years and was responsible for all aspects of finance, academics, and operations. Davidson Day School grew to 600 students and converted to a North Carolina charter school. Mr. Lockman was the Executive Director of Testing and Research at Iredell-Statesville School District. He was instrumental in starting their data-driven instructional program, which was the model for the State of North Carolina. His efforts were later adopted.

Principal - Dr. Boen Nutting Dr. Nutting recently retired from the Iredell School District as Assistant Superintendent. She has been a classroom teacher, principal, HR director, director of strategic plans, and communication director, and she served as the principal at the Mt. Mourne school, which Trinitas is looking to occupy. Dr. Nutting is an adjunct professor at Gardner-Webb University, where she teaches education leadership and serves as a mentor for newly graduating teachers. Dr. Nutting serves on a number of local non-profit boards, including Bridges of Hearts, Boys and Girls Club of Piedmont, and Top of the Lake Rotary, and is a Board Director at Iredell Health Systems.

Board Member - (Curriculum-Professional Dev.) - Joe Higgins

Mr. Higgins started, grew, and served as CEO of a Classical Education charter school network with 7 locations in Arizona and Colorado. He led a network of 4500 students and a staff of 500+. As the network leader, all his campuses were A or B-rated in each state, and teacher retention averaged 89%. Mr. Higgins held a Master of Education and wrote the book *'The Ultimate Toolbox For Classical Education and Charlotte Mason.'* Mr. Higgins is the publisher at Ethos Logos Partners, which publishes Classical Education curricula in print and digital formats. Ethos Logos is available on Amazon to the public, charter, private, and homeschool communities.

Q36.Factor (5) Describe any obstacles to educational reform efforts that leave chartering as an available option.



Like many growing communities, Mooresville, North Carolina faces many challenges when it comes to educational reform efforts. The following obstacles lend to the need for additional charter schools in the area:

Demographic Growth: Rapid population growth has strained existing educational resources. Verified wait lists at the closest charter school, Pine Lake, have 4,500+ students. North Carolina ranks in the top 5 fastest growing states in America. Over the past decade, North Carolina has seen significant growth, with several cities experiencing notable increases in population. The fastest-growing city in North Carolina is Mooresville, which has seen a 43.24% population increase over the past eight years (according to N.Weaver Statesville Chamber of Commerce)

Mooresville is the fastest-growing city in the Charlotte metropolitan area. The Charlotte metro, which includes Concord, has been ranked among the top 10 fastest-growing metros in the U.S., with a population growth of 8.1% from 2016 to 2021. (WCNC.com)

Capacity at Existing Schools:

The Iredell-Statesville School District is facing capacity issues, particularly the need for a new high school due to significant population growth in the southern end of Iredell County (Mooresville, Huntersville, Davidson, Cornelius). The Board of Education has identified this as a critical need and has requested the county to fund the construction of a new high school. The district's School Improvement Plans and the Facilities Task Force Recommendations highlight the need for new facilities, including a middle school, to accommodate the growing student population. In response to these needs, the Iredell-Statesville School District has approved a \$200 million funding request for the construction of a new high school.

Popularity of Classical Education Schools: The popularity of Classical Education charter schools has outpaced all other models as documented in a recent report from Texas Policy Institute (June 2023). Over the last decade, enrollment in Classical charter schools in Texas has increased sevenfold while enrollment in other charter schools has doubled. The report surveyed 423 parents and found parents who enroll their children in classical charter schools desire a liberal education for their children—one that prioritizes the pursuit of truth, goodness, beauty, wisdom, virtue, and citizenship.

Perceived prestige or academic rigor associated with Classical Education could influence parental preferences and enrollment patterns, potentially diverting resources and attention away from other reform initiatives.

Integration of the Homeschool Community: Integrating the homeschool community into broader educational reform efforts can be complex due to differing philosophies, methodologies, and regulatory frameworks. While some homeschool families may be interested in participating in public school programs or accessing supplementary resources, others may prioritize autonomy and independence.

Q37.Factor (6) Describe whether an existing charter school board has agreed to mentor the applicant.

We have the commitment from **Aspire Trade High School** (<https://aspiretradehs.org/> (<https://aspiretradehs.org/>)) a North Carolina charter school serving 9th to 12th grade to serve as our mentor for the new school. The school is the only charter model of its kind in North Carolina that features hands-on labs. The students have the ability to earn a high school diploma and a trade certificate in their four years. Head of Schools, Jennifer Nichols, has an amazing entrepreneurial spirit, has built a strong leadership team, and uniquely understands the nuances of a start-up charter school.

Q38.Factor (7) Describe whether the nonprofit corporation has existed for more than two years.

The Trinitas Classical Academy governing board was formed in 2023, and the application for non-profit status was applied in January 2024.

Q39.Factor (8) Describe whether the proposed board previously operated or currently operates a public charter school?



Board Chair Mark Lockman has extensive leadership experience in the Iredell School District. Mr. Lockman also started Davidson Day School and was responsible for all aspects of fundraising, site selection, construction, and staffing.

The Trinitas school principal, Dr. Boen Nutting, has served as site Principal at the proposed location and has a 30-year career in the Iredell School District.

Board Member Joe Higgins has extensive experience running and operating classical schools in Colorado and Arizona. He served for 5 years (from 2014 to 2019) as CEO of a Classical Education K8 charter network of 7 campuses, 4500 students, and a staff of 500. He was directly responsible for growth, finance, HR, marketing, and operations. All the schools were rated 'A' or 'B' during his tenure, and teacher retention was between 89-92%.



4. Conversion

Q40. Is this application a Conversion from a traditional public school or private school?

- Yes
- No



5. Replication

Per NC Administrative Code 16 NCAC 06G .0512, the State Board of Education (SBE) may, in certain well-defined instances, grant permission for a non-profit corporation board of directors (board) to replicate either its own successful model or to employ an educational management company (EMO) or a charter management organization (CMO) to replicate a successful model currently being operated under the management of the EMO or CMO. The SBE may also, in certain well-defined instances, grant permission for a non-profit corporation board to "fast track" such a replication by foregoing the planning year normally required for newly-approved charter applicants.

If applying for a replication, please review the following definitions and continue in this section.

- (1) "Charter school model" or "model" mean the mission as defined in the charter application and function of a charter school, including its governance, its curriculum, its organizational structure, its targeted population, and other key characteristics of the school, such as small class size, thematic academics, and extended day.
- (2) "Successful model" means a charter school model that meets the eligibility requirements in Rule .0513 of this Section.
- (3) "Replication" means the act of copying, recreating, or repeating, a successful charter school model. A "replication" requires the utilization of one charter school "model" to form the creation of a new charter school.
- (4) "Fast-Track Replication" is a special form of replication in which the approved applicant foregoes the planning year required of new charter school applicants.

History Note: Authority G.S. 115C-218.3;

Emergency Adoption Eff. August 20, 2019;

Eff. March 17, 2021.

Q57. Do you want this application to be considered for standard or fast-track replication?

- Standard
- Fast-Track
- No, this is not a replication

Applicant Comments :

We are looking for a one year planning term and to open in August of 2025. With the team and campus and expertise and identified student interest we are prepared to open as soon as possible.



6. Alternative

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

*The school must, in its application, designate which of the alternative accountability options it is requesting under ACCT-038 (<https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=ACCT-038&Sch=10399&S=10399&C=ACCT&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true>).

The option selected, if approved, cannot be changed except at the time of renewal (as outlined in CHTR-020.III (<https://simbli.eboardsolutions.com/ePolicy/policy.aspx?PC=CHTR-020&Sch=10399&S=10399&C=CHTR&RevNo=1.02&T=A&Z=P&St=ADOPTED&PG=6&SN=true>)).

Q68. Do you want your application to be considered for an Alternative Charter School?

- Yes
- No



7. EMO/CMO

Q70. Does the Charter School plan to contract for services with an “educational management organization” or “charter management organization?”

- Yes
- No



8. Remote Academies

§ 115C-218.120(a). Remote charter academies.

A charter that includes a remote charter academy may do any of the following:

- (1) Provide only remote instruction to enrolled students served by the charter in accordance with this Part.
- (2) Provide remote instruction to students enrolled in the remote charter academy and provide in-person instruction to other students served by the charter.
- (3) Provide enrolled students both remote instruction and in-person instruction. **A student who receives more than half of the student's instruction through remote instruction shall be classified as enrolled in the charter's remote charter academy.**

Q85.

Is the school you're applying to create a remote charter academy?

- Yes
- No



9. Mission Purposes, and Goals

9.1. Mission and Vision

The mission and vision statements, taken together, should:

- Identify the students and community to be served;
- Illustrate what success will look like; and
- Align with the purposes of the NC Charter School Law.

Q112. Please state the mission statement of the proposed charter school (35 words or less)

- The mission statement defines the organization's purpose and primary objectives, describing why it exists.
- The mission statement should indicate in measurable terms what the school intends to do, for whom, and to what degree.

Our mission is to support a **diverse scholar population with** a foundation in education to prepare them for the future. We focus on **rigorous academics, character formation, and civic responsibility.**

We will **partner with parents** to provide the time-tested Classical Education academic model. We believe in **empowering, equipping, and training our teachers** with tools and support to instill a lifelong love of learning in our scholars.

Q113. Please state the vision statement of the proposed school.

- What will the school look like when it is achieving the mission?
- The vision statement outlines how the school will operate and what it will achieve in the long term.



The vision of Trinitas Academy is to hold our leaders, teachers, and students to the highest level of integrity and accountability. We model what we teach. We embed character development in everything we do. We expect what we model. Our vision statement was formulated by reaching back into history and modeling the great thinkers and leaders on the character attributes that we look to teach and model in our schools:

Courage (Aristotle)

"Courage is the first of human qualities because it is the quality that guarantees the others."

Curiosity (Einstein)

"It is a miracle that curiosity survives formal education." Curiosity makes the acquisition of knowledge and wisdom long-lasting.

Humility (Aquinas)

"Where there is humility, there is wisdom."

Gratitude (Cicero)

"Gratitude is the parent of all other virtues – which allows us to seek what is Good, True, and Beautiful."

Dignity (Martin Luther King Jr.)

"Every man [human being] is an heir to a legacy of dignity and worth."

Justice (Gandhi)

"Truth never damages a cause that is just."

Fortitude (Locke)

"Fortitude is the guard and support of other virtues."

Responsibility (Abraham Lincoln)

"You cannot escape the responsibility of tomorrow by evading it today." What matters is measured.

Q114. Educational Need and Targeted Student Population of the Proposed Charter School Does the school plan to provide services to certain targeted subgroup(s), if so please explain? Provide a description of the 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. Additionally, how it will reflect the socioeconomic status of the LEA, SWD population, and MLL population of the district? See G.S. 115C-218.45(e) (https://www.ncleg.net/EnactedLegislation/Statutes/PDF/BySection/Chapter_115C/GS_115C-218.45.pdf).

Trinitas Classical Academy projects to enroll a student body that mirrors the Iredell-Statesville School District.

Iredell-Statesville Schools operates 38 schools and 20,163 students. The district's minority enrollment is 40%. The student body at the schools served by Iredell-Statesville Schools is 62.6% White, 13.9% Black, 3.1% Asian or Asian/Pacific Islander, 15.2% Hispanic/Latino, 0.1% American Indian or Alaska Native, and 0.1% Native Hawaiian or other Pacific Islander.

At schools in Iredell-Statesville Schools, 25.7% of students are eligible to participate in the federal free and reduced-price meal program, and 6.0% of students are English language learners. We plan on enrolling between 8-9% of our student population requiring Special Education (SPED) student services.

The operational budget and staffing matrix incorporate special population enrollment, including SPED and English Language Learners. The school administration will survey enrolled families and provide guidance to the Governing board with options to address transportation needs and before and after-school accommodations.

Q115. What are the enrollment trends and academic performance outcomes of surrounding schools in the selected community? What elements of your educational model will meet the needs of your target student population?



1. **The academic goals** for the school as a whole will look to attain the following North Carolina end-of-year assessment goals as follows:

- Year – 1 Math 59 Reading 55
- Year – 2 Math 60 Reading 56
- Year – 3 Math 61 Reading 57
- Year – 4 Math 63 Reading 58
- Year – 5 Math 64 Reading 60

Testing grades include 3rd to 8th grade on the NC End of Grade assessment

The strategy to achieve these results includes the implementation and fidelity of our school's Academic Accountability Committee efforts. These include using benchmark data (NWEA-MAP) and teacher assessment strategies to identify learning deficiencies as a predictor of EOG NC standards and implementing a strategy of differentiation, one-on-one instruction, or tutoring.

Strategies To Ensure Academic Goals:

- Teacher grade-level Professional Learning Committees (PLC's) collaborate to create effective instructional strategies, assessments, and ongoing reviews of student outcomes
- Teach curriculum with passion, creativity, and real-life examples (as monitored by administration)
- Protect instructional time with school schedules, events, etc
- Implement student interventions for struggling students: reteaching, remediation, tutoring, differentiation, and other strategies.
- Create a summer program that encourages students' ongoing learning and reduces learning loss.
- Homework - Trinitas students will demonstrate responsibility for their learning by achieving the following homework completion rates:

1. Year 1 – 70%
2. Year 2 – 75%
3. Year 3 – 80%
4. Year 4 - 82%
5. Year 5 - 84%
- 6.

Measured by: PowerSchool in the "homework" category **Strategies:** Homework will be appropriate per grade level, meaningful, relevant, and designed as review or practice. Students will have resources to complete homework. Support will be available for students who struggle. Homework folders for all students will be checked daily by teachers. Teachers will place a high value on homework completion.

2. Measurement - Data: Our minimum academic goal, as measured by the beginning of the year NWEA MAP testing, is one academic year of growth for each grade we assess with NWEA-MAP (2nd to 8th).

Data Informed Instruction. Using internal assessment data, the teacher and Academic Accountability Committee (AAC) can quickly isolate low scores and determine if the issue is curriculum-based or isolated to a particular instructor or classroom. With a curriculum that is paced correctly and calls out the various standards to be focused on during the particular unit, we can ensure that we have a common foundation across the school.

Strategies To Ensure Data Implementation:

1. Study Hall or one-on-one tutoring with the teaching staff. All teaching staff is contractually required to schedule two hours per week for tutoring.
2. Purposeful Pause in content delivery if portions of a class need assistance.



3. Dedicating class time to differentiate in 'Crash Course' by strand instruction.
4. Advanced (Gifted and Talented) scholar strategy to challenge students who can advance beyond their grade level.
5. Differentiated Instruction – and the training needed for all teachers to implement differentiation techniques in their classroom successfully.
6. Progress monitoring with additional testing on standards that need additional support.
7. Move to the Intervention department under a pull-out model. Third-party cloud-based subscription services like iStation, iReady, Study Island, and Wilson Foundations.
8. Parent Volunteers and or tutor clubs

3. Culture – Character Education

Character formation is a major focus of the Governing Board and a component of our mission statement. We are going to implement a detailed effort to integrate character education into our classrooms and school-wide. This implementation includes a 10-part Plan as follows:

1. **Language-based curriculum is delivered through a strong classical literature-based curriculum.** By using classical literature and fables, scholars learn through the power of time-tested moral stories. Societies have used the power of stories to teach the next generation right from wrong for over 5000 years. The expansion of vocabulary and the ability to internalize these deep, rich stories into everyday life is the foundation of the Trinitas Academy character program.[1][2] Critical to the Trinitas Academy model will be a comprehensive Social Emotional Learning program that includes lesson plans, SEL discussion prompts, and training tools for teachers to incorporate into their ELA, history, and, in limited cases, science lessons.
2. **Monthly School-Wide Focus on 2 Values/Virtues** – As part of the Trinitas Academy character plan, the school will spend one month focusing on developing two values and virtues. The Governing Board started with Ben Franklin's 13 Virtues (published in his 1720 autobiography) and tailored the options to include 20 values/virtues throughout the year. Teachers and scholars spend intentional time with two featured values/virtues each month. The in-depth analysis includes schoolwide exercises and classroom discussion on the focus values/virtues. Scholars walk through what each value/virtue means, the alternatives, and how their actions affect the scholars around them.
3. **Positive Language, Relationships, and Discipline** – This method uses the works of Dr. Rudolf Dreikers and Dr. William Glasser as a foundation for character development. These are rooted in the “why” of anti-social behavior and the importance of how we react as a school community to poor behavior. The nuances of language choices and the power of relationships and high expectations are the root of both philosophies. Dreikurs states that "his goal may occasionally vary with the circumstances: he may act to attract attention at one moment, and assert his power or seek revenge at another" (Dreikurs, 1968, p.27)[3]
4. **School Climate Approach** – Character education and Bullying prevention do not stop in the classroom. An effective culture program should incorporate every aspect of a scholar's day on campus. From orderly transitions in the hallways, holding of doors for other scholars or adults, to the custom of using please and thank you, to cleaning up lunch the room and modeling the appropriate behaviors on the playgrounds, there are large and small parts of every scholar's day that should emphasize the school's cultural norms.
5. **Visual Reinforcements of Character Models** - As part of the rollout of the Trinitas Academy character program, numerous visual reinforcements in the classroom, on the hallway walls, and in the lunchroom and play areas will be an important reminder of what the school holds as important. Visuals will be custom-designed to tie in with the famous stories from history that are studied in the classrooms to reinforce character messages.
6. **Teacher Aligned and Integrated Support - Materials available in Schoology LMS include values and virtues lesson plans, prompts tied to novels, campus-wide programs as standalone modules, or for maximum impact embedded in the traditional ELA, History and Science, and lessons.** The curriculum-



embedded approach lets teachers and scholars move seamlessly through TEKS standards and character instruction. There is a high degree of teacher flexibility in our character education plan. No one knows their scholars and what the classroom needs moment by moment better than the teacher in the classroom. Specific professional development training will occur prior to the launch of the school year and will be ongoing to support the teachers' mastery of character development learning opportunities.

7. **Parental Involvement** – Parent engagement is paramount for the success of any educational or character-based program. Part of the Trinitas Academy character education plan involves parental outreach and a focused effort to engage parents with on-campus activities and service projects. Partnering with families and the community is critical to the Mission/Vision set forth by the Trinitas Academy Governing Board. The study of growth mindset and engagement of students in their learning has shown promising results in increasing student outcomes, rising above socioeconomic or home life challenges, and creating a sense of belonging on a school campus.

8. **Scholar Ownership of Culture - Trinitas Academy House System** – to achieve the goal of involvement from parents and ownership from students, Trinitas Academy will roll out a house system with the school's launch. The concept has been tested and is inspired by the ideals of republican participation, shared leadership, and civil service. Specifically, the Trinitas Academy House System exists for three purposes:

1. To allow scholars a system in which they can belong, collaborate, and serve.
2. To allow families an organizing structure to build community, celebrate learning, and give back to their local school.
3. To sponsor school events and other school needs with the creativity, energy, and leadership of family volunteers in each grade level.

Similar to how the curriculum is organized by historical time period following a 4-year cycle, scholars in each grade level will belong to a House (called by the Latin "Domus") in partnership with the other grade level that is studying the same period in history each year. Houses are encouraged to seek outside service projects beyond the campus. Suggested activities include visiting retirement homes, volunteering in local parks, connecting with local service clubs like Top of the Lake Rotary, and more.

1. **Foundations Rooted in Stoic Philosophy** – The Stoic model of education—derived from the works of Seneca, Epictetus, and Aurelius – focuses on education as knowing yourself and the importance of logic and critical thinking in decision-making. In the tradition of the Stoic philosophy, education is preparation for life, and knowledge is integrated into private, local, and global understandings. School leaders, teachers, and staff will be hired and expected to exhibit the Stoic ideals we teach in the classrooms.

2. **Culture Review and Monitoring Committee (CRMC):** Many states mandate mental health awareness programs and suicide prevention instruction. The root of these initiatives is a plan to monitor the mental health of our students. The CRMC will meet quarterly and include school leadership and staff members. The CRMC is organized with specific goals, actionable data to review, and tools to implement, all aimed at improving the overall culture at a school. The CRMC will be responsible for:

1. Training staff on best practices in dealing with student mental health issues, the role of Adverse Childhood Events (ACE's) on our student population
2. Formal staff training on the signs of suicide or crises in our students.
3. Roll out and monitor the SEL programs (in a classroom, campus-wide, and community engagement)
4. Develop a culture of 'see something, say something' among the staff regarding our students.
5. Identify local community service providers and engage these services for our school's students, staff, and families.
6. Monitoring with goals of first-time discipline referrals to the following targets;
 1. Year 1
 2. Year 2



3. Year 3

4. Year 4

5. Year 5

The CRMC will make quarterly reports to the Trinitas Academy Governing Board on the above initiatives, their effectiveness, and any areas of weakness.

- [1] Carr, David & Harrison, Tom (2015). *Educating Character Through Stories*. Imprint Academic.
- [2] Bohlin, Karen (2005). *Teaching Character Education Through Literature*. Psychology Press.
- [3] Dreikurs, R., & Loren, G. (1968). *A new approach to discipline: Logical consequences*. New York: Hawthorn Books.



Q116.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 in grades 9-12).

The Iredell-Statesville School District has 38 public schools serving 20,583 students in PreK to 12th grade. These percentages do not take into effect population growth over the 5 year period, projected to be 8.9%. (<https://worldpopulationreview.com/us-cities/mooresville-nc-population>)

Iredell Statesville SD	Trinitas Projected Enrollment By Year										
	Number of Students	Year 1	%	Year 2	%	Year 3	%	Year 4	%	Year 5	%
Kinder	1449	78	5.38%	104	7.18%	104	7.18%	104	7.18%	104	7.18%
1st	1397	78	5.58%	104	7.44%	104	7.44%	104	7.44%	104	7.44%
2nd	1389	78	5.62%	78	5.62%	104	7.49%	104	7.49%	104	7.49%
3rd	1356	78	5.75%	78	5.75%	104	7.67%	104	7.67%	104	7.67%
4th	1439	78	5.42%	78	5.42%	78	5.42%	104	7.23%	104	7.23%
5th	1481	78	5.27%	78	5.27%	78	5.27%	78	5.27%	104	7.02%
6th	1523			78	5.12%	78	5.12%	78	5.12%	104	6.83%
7th	1574					78	4.96%	78	4.96%	78	4.96%
8th	1693							78	4.61%	78	4.61%
	13301	468		598		728		832		884	
Percentage K8		3.52%		4.50%		5.47%		6.26%		6.65%	

Q117.Summarize what the proposed school will do differently than the surrounding schools serving the same population of students. What will make this school unique and more effective than the currently available public-school options?



Here is a summary of how Trinitas Academy will differ from surrounding schools. There are no Classical Education schools within an 18-mile radius of our proposed location.

- Trinitas Classical Academy focuses on the "liberal arts" - subjects like grammar, logic, rhetoric, arithmetic, geometry, music, and astronomy. This provides a well-rounded, humanities-focused curriculum rather than just core subjects.
- Trinitas Classical Academy emphasizes critical thinking, reasoning, and communication skills through the "trivium" of grammar, logic, and rhetoric. Public schools tend to focus more on rote memorization and standardized testing. Discovering and maintaining the joy of learning and discovery is a primary goal of Classical Education.
- A study from the Texas Policy Foundation found that over the last decade, enrollment in classical charter schools in Texas has increased sevenfold, while enrollment in other charter schools has only doubled. This suggests a dramatic increase in demand for classical education among Texas parents.
 - Parents who enroll their children in classical charter schools desire a "liberal education" that prioritizes the pursuit of truth, goodness, beauty, wisdom, virtue, and citizenship. They are generally satisfied with the quality of instruction and climate in these schools, though some expressed dissatisfaction with facilities and athletics.
 - The study surveyed 431 parents of Texas classical charter school students and found that their top priorities were instruction in core academic subjects, independent thinking, and the formation of moral character and virtue. In contrast, priorities like future employment, college success, and fixing social problems were much less important. Over 90% of surveyed parents expressed satisfaction with how well their child's classical charter school provided instruction in character and virtue. Instructional methods in classical schools are more Socratic, with discussion and active student participation, rather than just lectures and textbooks. Classical Education students focus from an early age on writing and communication of big ideas.

Expected Academic Outcomes

- Trinitas Classical Academy will foster a deeper love of learning and intellectual curiosity in students, as the curriculum is designed to engage their minds rather than just meet standards.
- Classical charter schools in urban areas like New York City, Washington DC, and Nashville have higher proficiency rates in math and English Language Arts (ELA) compared to their district public school averages. For example, the Nashville Classical charter school more than doubles the proficiency rates of local district public schools in both math (64.5% vs 30.1%) and ELA (62.1% vs 29.9%).^[1]
- Through the trivium, students at Trinitas Classical Academy will strengthen their language proficiency, logical reasoning, and persuasive communication abilities.
- The well-rounded liberal arts focus could better prepare students for college and careers by giving them a broad base of knowledge and versatile cognitive skills.
- The emphasis on moral and character development could lead to more self-disciplined, ethical, and civic-minded graduates.

[1] Classical Education: An Attractive School Choice for Parents, Brandon McCoy. Manhattan Institute. July 29, 2021.

Q118. Describe the relationships that have been established to generate support for the school. How have you assessed demand for the school? Briefly describe these activities and summarize their results



The driving force behind the outreach and engagement plan for Trinitas Academy was the governing board. Their long-term engagement in various Mooresville (Charlotte) networks has been invaluable for engaging the community and listening to the needs of parents, teachers, non-profits, business and faith officials, and elected officials.

During the community outreach period, the board held several planning meetings to develop the Mission Statement and values Statements and determine what type of school to launch. In speaking with parents, families, pastors, business members of the area, and community leaders, the Governing Board determined sufficient demand for the proposed school. The themes that the

Governing Board compiled included:

- The area we have identified has large growth and a lack of school choice
- Parents are interested in a character-focused school
- Once we explained our model of blending Classical Education with Charlotte Mason, parents, and community leaders understood the model and found it unique and a match for their educational goals.
- The church community explained the rise in homeschool families in their community and was encouraged by the Trinitas Academy model of 'follow along' between school and homeschoolers.

Mooresville has four charter groups as options for families in the fast-growing community. None of these models (Pine Lake, Iredell Academy, Langtree Charter, American Renaissance) provides Classical Education. The closest Classical Education school is 18 miles away. No choice schools are integrating the homeschool community into the campus population.

In meetings with area business leaders, political leaders, pastors, families, and existing charter and district school leaders, we formulated our messaging, continued to test our model, and began building early adopters for the school.

Our team held several open houses at the campus, hosting presentations on the model and the plan to reopen the 75-year-old campus. We held an open community house to invite alumni, parents, grandparents, and any interested community members to tour the school. We are leveraging the history of the Mt. Mourne school and its important position in the community. We were interviewed by WSIC radio, sent press releases, and had articles appear in local newspapers. [1]

Our marketing efforts included a dedicated social media campaign on Facebook, Instagram, Tick Tock, and LinkedIn. We had over 150,000 impressions and interactions.

Our group has done presentations at local churches (The Cove, St. Patrick Presbyterian, Fairview United Methodist, and others), community groups (Rotary Club of Mooresville), several elected officials (Iredell County Commissioner, Mooresville Mayor, and individual council members, all the area legislators, Iredell County Economic Development), and numerous business leaders in the area.

Plan For Community Outreach One Year before Open: Our staff will start with the interest list of students, update them on the enrollment process, and look to build a group of early supporters of the school.

Partnering with parents is part of the Mission Statement of Trinitas Academy, and engaging with families has already begun. It will ramp up after approval of the charter and the set opening date (August 2025).

Beginning in September of 2024, through the school opening, the objective of the Principal, Governing Board, and early hired staff will be to implement a program to engage the community in the new school. Our strategic plan for enrollment includes an aggressive budget of \$50,000 for traditional marketing and advertising. The effectiveness of this effort will be a series of 'call to action' events and open houses held at local community spaces to present the school model, answer questions, and begin the enrollment process. The Principal has launched schools in the Iredell area and uniquely understands the process of gaining traction, telling the school's stories, and finding early adopters to help the outreach efforts.

During the year-long enrollment and marketing period, all efforts will be tailored towards;

1. Listening to the community and addressing any unforeseen needs.
2. Engaging the families, businesses, and civic organizations/churches in spreading the school's word.
3. Special focus will be placed on area preschools, homeschool groups, and churches.



From prior experience, the initial focus will be on finding and building relationships with early adopter parents that can help organize and extend the reach of the school leadership team. This early parent team will become the beginning PTA and has proven invaluable in organizing volunteers and understanding the pulse of the local parent community.

The team will look to set up tables or events at the area Preschools, and at high traffic businesses and at local community events that are occurring in the target areas. Presentations at MOPS Clubs (church/homeschool clubs), youth athletics teams, and area Boy and Girl Scouts will be part of the early outreach. The outreach will include setting up tables at libraries, supermarkets, churches, and youth sports events.

Meetings with and outreach to - local Head Start, Day Cares, Pre-K, and Clubs programs: The Principal and leadership team are currently establishing relationships with local Head Start, daycare, and PreK programs. Presentations at local daycare centers, Head Start clubs, and private preschools will all help build the demand for the new school. The team has met with the executive directors of the target area, and each has unique ways to engage their parents. Many of these programs have after-school services and will pick up scholars at Trinitas Academy, and they were very interested in partnering with our school. The Principal has identified several tutoring, music, karate, and special needs vendors in the local area, and many have expressed interest in partnering with the school.

Social Media: All events will be publicized on social media and via email. A consistent

social media campaign has been budgeted for and will be the hallmark of our communication efforts. Beginning in September of 2024, the team will post event updates, school hiring, and construction progress on social media at least once per week, surveys asking families for feedback, and monitoring community questions. The social media program will be effective if it is a blend of organic activity and paid boosting of ads.

The Marketing Campaign (detailed in Student Recruitment and Enrollment) will produce messages both digitally and in print, both in English and Spanish, to reach all families. The plan has a budget of \$50,000 and covers print, radio, outdoor, and social media.

School Open Houses: Starting in August of 2024, the leadership team will host two open houses per month. All marketing efforts will communicate these events and we have found them to be great ways to meet prospective parents and answer their particular questions. These events will be scheduled during times that are convenient. Each event will have handouts of Frequently Asked Questions and materials where families can raise questions or offer feedback on our plan.

Connecting with Families: The success of our school will be directly related to the power of relationships. Under the Culture section, we detail the foundational philosophies of Adlerian psychologists Dr. Dreikers and Dr. Glasser. In keeping with the idea of relationship building, all our events and interactions with parents will focus on getting to know their families' stories, dreams, and struggles. Once enrolled and opened, we will meet children at the door each morning and meet the parents at their care each afternoon during pick-up. Meet the Teacher nights will occur very early in the year, and the teacher will make a phone call home within the first month. All these efforts fit our mission and aim to build solid relationships with families.

[1] <https://www.iredellfreeneews.com/news-features/2023/trinitas-academy-to-open-on-former-campus-of-mt-mourne-school-pending-state-approval/>

Q119. **Attach Appendix A: Evidence of Community/Parent Support.**

- Provide evidence that demonstrates parents and guardians have committed to enrolling their children in your school.
- 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).

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5



Applicant Comments :

Attached:

- Interest List
- Sample Advertising and Outreach

Applicant Evidence :


 Master Enrollment List - 1-2...


 Community Support - Outre...

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9.2. Purposes of the Proposed Charter School

Q120. Select one or more of the six legislative purposes the proposed charter will achieve, as specifically addressed in the NC charter school statute GS 115C-218, and the proposed school's operations. The Six Legislative Purposes of a Charter School are:

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

Applicant Comments :

We are addressing each of the 6 legislative purposes - see below.

Q121. Provide a brief narrative to coincide with each applicable legislative purpose(s).



1. Unique Teacher Supports At Trinitas Academy, teachers play a crucial role in developing students' intellectual and personal habits, fostering character development, and promoting habit formation through a comprehensive curriculum.

Teachers in classical schools can lead the classroom in a way that best suits their students, motivating them with love and wonder. They can tailor instruction to individual students, creating engaging environments filled with Socratic questions, the search for truth, and exposure to various disciplines like literature, science, philosophy, and music. With a focus on the Socratic teaching methods, Trinitas puts student-led discussions at the forefront of the model. This student-centered approach helps students refine their communication skills and better understand various subjects.

Our model includes various teacher support models detailed in this application, including comprehensive and immersive professional development before beginning in our school and ongoing in persons weekly PD, a database of 75 micro courses, and annual intensive workshops, all designed to train teachers on the nuance of the Classical model.

Teacher mentoring and master teacher groups will be formed in year two, and our budget reflects on-campus instructional support and assistance from Ethos Logos, experts in the field of public Classical Education instruction and curriculum.

Operationally, Trinitas Academy will employ a comprehensive program to ensure quality instruction, including

1. Quality teacher recruitment and detailed Professional Development offerings.
2. Ongoing monitoring of curriculum, academic growth, and teacher impact using the LoTi teacher evaluation tool.
3. Quality data capturing metrics that help design and improve instruction (iReady and NWEA MAP)
4. Detailed intervention strategies using MTSS/RTI, a framework with special interventions for Tier 3 students, ELL, and Special Education populations.
5. The quality curriculum is aligned with NC State Standards with customization for remediation, acceleration, and special populations.

2. Accountability Towards Academic Excellence – The Trinitas Academy Governing Board is committed to building an academic program that sets its students up for success. The academic goals and targets are listed in the below charts (Answer #4) through years 1 and 2. The targets are realistic and consider all the new students joining a new program. Each progressive year, increases are expected as we have more time to focus on our students' success.

Academic Accountability Committee (AAC): The Principal will be tasked with creating a school-based Academic Accountability Committee (AAC) comprising the Principal, administration, master teachers, PD coach, and ELL/Special Education team. The AAC will meet quarterly to review curriculum, data-driven instruction (the quarterly NWEA-MAP benchmark assessment data), teacher professional development strengths and weaknesses (using the LoTi teacher pop-in scores explained in the professional development section of this application) and recommend corrective actions in curriculum, pacing or professional development should the available data point to an issue. The school principal will report the results, goals, and progress to the Trinitas Governing Board after each quarterly NWEA benchmark assessment.

As part of the academic oversight role of the Governing Board, the members will understand the academic goals established with the Principal and the Governing Board. Academic goals established will include increases in academic performance over State of North Carolina averages and against peer schools in the Iredell School District. These goals will be reviewed annually, considering the board policy statement on what academic success looks like at Trinitas Academy. The school Principal will train the Governing Board on the academic accountability framework used by the State of North Carolina Department of Education. At least quarterly, the Principal will compile an academic progress report, including benchmark data, to the Governing Board (through and in conjunction with the Academic Sub-Committee) with any benchmark data that may be pertinent.

The AAC will review benchmark data, teacher observations, end of year NC State testing and prepare a report for the Board Academic Sub-Committee. This report will provide insight into curriculum effectiveness, professional development plans, and additional resources needed to address academic targets, as well as review the performance of special populations (ELL, special education, gifted).

These goals will be monitored and become a part of the Principal's annual performance review.



3. Expanded Options For Mooresville Families Our school model will focus on the inclusion of the homeschool community with our on-campus families. Trinitas Academy looks to create a schooling option that addresses why many parents are choosing to move to homeschooling instead of traditional public school. The National Center for Education Statistics (NCES) conducts its National Household Education Survey (NHES) every four years, and the 2016 report found the most common reasons for parents taking their students out of the public school system in favor of homeschooling were:

1. Dissatisfaction with their school and desire for other options included a concern about the environment of other schools (80%).
2. Almost two-thirds of parents cited dissatisfaction with academic instruction at other schools (61%).
3. Large numbers of parents also indicated that they were looking for other options that provide moral - SEL (67%) or religious (51%) instruction or provide a nontraditional approach to a child's education (39%).
4. Comparatively fewer parents cited physical or mental health problems (14%), special needs (20%), or temporary illness (4%).^[1]

Trinitas Classical Academy is built on the time-tested Classical education model, which matches academic rigor and a focus on character development and Social and Emotional Learning. There are no Classical options or charter schools within an 18-mile radius of our proposed geographic area.

4. Improved Student Outcomes The academic goals for the school as a whole will look to attain the following North Carolina end-of-year assessment goals as follows:

- Year – 1 Math 59 Reading 55
- Year – 2 Math 60 Reading 56
- Year – 3 Math 61 Reading 57
- Year – 4 Math 63 Reading 58
- Year – 5 Math 64 Reading 60

Testing grades include 3rd to 8th grade on the NC End of Grade assessment.

The strategy to achieve these results includes the implementation and fidelity of our school's Academic Accountability Committee efforts. These include using benchmark data (NWEA-MAP) and teacher assessment strategies to identify learning deficiencies as a predictor of end-of-grade NC standards and implementing a differentiation strategy, one-on-one instruction, or tutoring.

As measured by the beginning of the year NWEA MAP testing, our minimum academic goal is one academic year of growth for each grade we assess with NWEA-MAP (2nd to 8th).

Data Informed Instruction. Using internal assessment data, the teacher and AAC team can quickly isolate low scores and determine if the issue is curriculum-based or isolated to a particular instructor or classroom. With a curriculum that is paced correctly and that calls out the various standards to be focused on during the particular unit, we can ensure that we have a common foundation across the school. With the data broken down by strand, a series of intervention programs will be employed to achieve maximum student growth:

1. Study Hall or one-on-one tutoring with the teaching staff. All teaching staff is contractually required to schedule two hours per week for tutoring.
2. Purposeful Pause in content delivery if portions of a class need assistance.
3. Dedicating class time to differentiate in 'Crash Course' by strand instruction.
4. Advanced (Gifted and Talented) scholar strategy to challenge students who can advance beyond their grade level.
5. Differentiated Instruction – and the training needed for all teachers to implement differentiation techniques in their classroom successfully.
6. Progress monitoring with additional testing on standards that need additional support.
7. Move to the Intervention department under a pull-out model. Third-party cloud-based subscription services like iStation, iReady – Study Island - and Wilson Foundations.
8. Parent Volunteers and or tutor clubs

5. At-Risk Population We anticipate that 8-10% of our student population will qualify for IEP services. Students

with special needs will receive the services outlined in their Individual Education Plan (IEP). Our teachers will work closely with administration, Special Education teachers, contracted service providers, parents, and any IEP team member(s) to ensure an IEP is



effective and meets the requirements stated in the document.

Progress monitoring of special education populations will occur in the same manner and fashion as all Trinitas Academy students. Benchmark assessment data (DIBLES for early reading, NWEA-MAP for standards mastery) will be compiled quarterly. The Special Education and/or English Language Learning (ELL) staff will follow the 8-step data analysis process, which all teachers in the school follow. The final report on student progress, goal-setting plan, and strategy to improve academic outcomes will be presented to the Academic Accountability Committee (AAC) for review and monitoring.

Trinitas Academy will address English Language Learner populations with staff and plans detailed in this application. Classical schools feature Latin instruction as a standalone class and as part of spelling/vocabulary instruction in ELA and Science. Research out of Penn State Center for Language Science found that lessons in the Latin roots of words may help Spanish-speaking students learning English bridge the gap between the two languages. [2] Using Latin to bridge the gap for ELL students is another tool to address the growing Hispanic population in North Carolina.

Gifted and Talented A gifted student gives evidence of high achievement capability in areas such as intellectual, creative, artistic, or leadership capacity, or in specific academic fields, and who needs services and activities not ordinarily provided by the school to develop those capabilities fully.

The curriculum and mission of Trinitas Academy are rigorous academic expectations. All students will receive rich content and, in some courses, above-grade-level opportunities to read and dissect literature. Our academic model includes, for all students, differentiation methods to be trained, monitored, and tracked, an academic model that focuses on acceleration, depth and complexity, higher-order thinking skills, and content extensions. A standard in all our classrooms is for teachers to employ large groups, small-group instruction, and targeted interventions for low- and high-achieving students.

Gifted/Talented student identification will be determined by testing that shows the students test in the 95th percentile and above on norm-referenced standardized tests. The site Principal will choose these testing options in the identification of Gifted/Talented students: Naglieri Test of Nonverbal Ability (NNAT), Cognitive Abilities Test (CogAT), Otis-Lennon School Ability Test, IOWA Test of Basic Skills (ITBS), NWEA-MAP. Additional data: anecdotal records, interviews, observations, characteristics, and checklists will be considered in identification. The teacher will refer students to the RTI/MTSS team when the student is identified as needing an advanced academic challenge.

In the 6th to 8th grades, students above grade level in math can enroll in a grade-ahead math class. Trinitas Academy will offer all qualifying students Algebra 1 (a typical 9th-grade course). In addition, advanced math classes will be made available using teacher-guided online tools.

Trinitas Academy will implement academic interventions such as accelerating a student in a single subject, compacting curriculum, concurrent enrollment, advanced placement, or customized advanced courses in the Schoology LMS Curriculum module, allowing teachers to customize academic programs, independent academic studies, and grade acceleration. Trinitas Academy will partner with Ethos Logos Publishing, which maintains K12 Classical Education content, including numerous high school AP courses. These resources will be available for all Gifted and Talented students based on the above identifications.

6. Encourage Unique Teaching Methods

Trinitas Academy chose the Classical Education model because it blends academic rigor with a deliberate focus on character education. The role of a teacher in a Classical school is to encourage risk-taking, exploration, and deeper learning. Beginning in the early grades of K-5, teachers blend direct instruction with Socratic discussions with the goal of students exploring the subject matter that interests them all within the preplanned scope and sequence. A classroom experience will have limited direct instruction, followed by individual or small group analysis of the topic, and then include classroom-wide discussions. The Grammar stage of the Trivium is where the foundation around math facts and concepts, as well as grammar conventions, vocabulary, comprehension skills, and early writing, are taught and memorized. In the 5th to 8th grades, there is a minor focus on direct instruction and a greater emphasis on Socratic and student-led individual and group projects. Each band of the Trivium in a Classical school naturally follows age-appropriate learning styles. Recitation and jingle-based learning begin in 1st grade and help young students master concepts that will be referenced as they grow in the Classical model.



With a focus on the Socratic teaching methods, Trinitas puts student-led discussions at the forefront of the model. This student-centered approach helps students refine their communication skills and better understand various subjects. Prior knowledge, the interconnection of facts, and the application of the knowledge learned are the skill sets that the classical model builds in students. Trinitas Academy will implement time-tested Classical pedagogy with research-backed choices on ELA, Math, and Science curriculum and teaching methods.

The Schoology LMS (by Powerschool) will have curriculum resources and support materials to complement the selected textbooks detailed in this section. Schoology has day-by-day sample lesson plans and add-on resources (PowerPoints, documentaries, Socratic discussion prompts, source documents, etc.) that the teacher can use off the shelf or customize to the student's pacing and interest level. This content-rich resource, aligned to thematic units based on history, allows our teaching staff to make natural connections and focus on delivering content and student engagement.

Over 75 Professional Development courses have been developed in the Schoology Learning Management System. These courses range from particular tools and nuances of Classical Education, Charlotte Mason's philosophies, to practical examples of real-world teacher challenges in Classical Education. The PD Course offerings intentionally introduce new staff members to basic aspects of our culture and expectations. Once on board, the PD Course offering trains a teacher on a theory or practical aspect of their profession. The Cato Academy PD department will observe an issue or coachable moment, assign the corresponding Virtual PD mini-course to the teacher, and follow up to ensure understanding and implementation. A sampling of the courses offered includes:

- Relating with Parents
- Relational Discipline Strategies (Dr. Druikers and Dr. Glasser)
- Narration and Recitation at various grade levels
- Socratic Instruction - Intro, Level 1 and Level 2
- Classroom Management
- Understanding Classical Curriculum Resources
- Data interpretation and grouping
- Differentiation in the classroom

Staff will have an opportunity to progress in their careers at Trinitas Academy by attending in-person Professional Development classes and achieving mastery through various observations, one-on-one coaching, and mentorship.

[1] Parent and Family Involvement in Education: Results from the National Household Education Surveys Program of 2016. M McQuiggan Mahi-Megra. 2016. IES, National Center for Educational Statistics.

[2] Penn State. "Latin may help students bridge their native language with English." ScienceDaily. ScienceDaily, 4 October 2018.

Applicant Comments :

None

9.3. Goals for the Proposed Charter School

Q12. 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.



ACADEMICS

The academic goals for the school as a whole will look to attain the following North Carolina end-of-year assessment goals as follows:

- Year – 1 Math 59 Reading 55
- Year – 2 Math 60 Reading 56
- Year – 3 Math 61 Reading 57
- Year – 4 Math 63 Reading 58
- Year – 5 Math 64 Reading 60

Testing grades include 3rd to 8th grade on the NC End of Grade assessment

The strategy to achieve these results includes the implementation and fidelity of our school's Academic Accountability Committee efforts. These include using benchmark data (NWEA-MAP) and teacher assessment strategies to identify learning deficiencies as a predictor of EOG NC standards and implementing a strategy of differentiation, one-on-one instruction, or tutoring.

Strategies To Ensure Academic Goals:

- Teacher grade-level Professional Learning Committees (PLCs) collaborate to create effective instructional strategies, assessments, and ongoing reviews of student outcomes
- Teach curriculum with passion, creativity, and real-life examples (as monitored by administration). Supported, trained, and monitored by Ethos Logos Publishing.
- Protect instructional time with school schedules, events, etc
- Implement student interventions for struggling students: reteaching, remediation, tutoring, differentiation, and other strategies.
- Create a summer program that encourages students' ongoing learning and reduces learning loss.
- Homework - Trinitas students will demonstrate responsibility for their learning by achieving the following homework completion rates:

1. Year 1 – 70%
2. Year 2 – 75%
3. Year 3 – 80%
4. Year 4 - 82%
5. Year 5 - 84%

Measured by PowerSchool in the "homework" category. **Strategies:** Homework will be appropriate per grade level, meaningful, relevant, and designed as a review or practice. Students will have resources to complete homework. Support will be available for students who struggle. Homework folders for all students will be checked daily by teachers. Teachers will place a high value on homework completion.

MEASUREMENT

Measurement - Data: Our minimum academic goal, as measured by the beginning of the year NWEA MAP testing, is one academic year of growth for each grade we assess with NWEA-MAP (2nd to 8th).

Monitoring and Oversight of Assessment Plan: The School Principal will direct and create an Academic Accountability Committee (AAC) to monitor curriculum, assessment data, and instruction. The AAC will include the Principal, Vice Principal, PD coaches, and master teachers. AAC will review benchmark data and teacher-generated unit grading data to ensure academic growth in alignment with school-wide goals. Historical analysis of prior year NC state assessment results will occur over the summer during curriculum and assessment planning. Gaps between the benchmark and end-of-year academic data may prompt a closer look at individual teachers' formative and summative testing plans and curricula.

NWEA-Map Student Assessment - uses anonymous assessment data from over 10.2 million students to create national norms. Educators compare their students' performance against norms to improve instruction. The norming against multiple state standards is a critical component of the MAP program. MAP testing data will provide valuable feedback to ensure our proprietary curriculum is aligned for quality instruction. With aligned curriculum and predictive testing data, the Professional Development



team and site-based administrators can quickly and accurately guide teacher training.

1. **To differentiate instruction.** MAP Growth data makes it easy to identify students' different learning levels so teachers can engage in differentiated instruction and ability grouping, leading to positive results for every student.
2. **To evaluate curriculum programs.** MAP Growth data have become a key component in assessing the impact of specific curriculum programs. MAP Growth scores contribute to understanding what works so educators can see how much growth has occurred with participating students when special programs are instituted.
3. **To use as a universal screener/RTI placement tool.** Universal screening tools can identify students at risk of academic failure and inform a learning plan. Grade-independent MAP Growth assessments received the highest possible rating for classification accuracy and high ratings in all other categories from the Center on Response to Intervention (<http://www.rti4success.org/> (<http://www.rti4success.org/>)).
4. **To project proficiency on state tests.** MAP Growth items enable NWEA Research to analyze students' performance on MAP Growth as compared to other assessments. From there, NWEA researchers create state-specific linking studies that predict proficiency on state accountability assessments, as well as college readiness linking studies that predict college readiness for grade 5+ students as measured by ACT benchmarks.

NWEA benchmark assessments will occur 3 times per year to provide the administration and instructional staff with data that can be acted upon with respect to deficiencies and ELA and math academic growth. Internal Benchmark Assessment: NWEA measures students beginning in grade 2 and continuing through grade 8.

- NWEA – MAP Test 1 - August - Early August (to determine the academic level of all students)
- NWEA – MAP Test 2 - November – (12-14 weeks from prior benchmark)
- NWEA – MAP Test 3 - March 4th – (12-14 weeks from the prior benchmark)
- NWEA – MAP Test 3 – Optional post-NC state assessment for calibration

The proposed plan for assessment and the work of the teachers and AAC will provide a fluid process for modifying curriculum and instruction based on measurable data. The assessment plan will also provide ample time for the teachers to reflect on the personalization strategies used and proactive academic interventions. Early literacy monitoring via Dibel Next will signal Tier 1, 2, or 3 intervention strategies up to convening and Response To Intervention Team (RTI) and pull out intervention plans as needed.

Additional Assessment Options used in the school. The following assessment data will be analyzed on a per-student basis;

- DIBELS- Dynamic Indicators of Basic Early Literacy Skills
- Teacher developed pre-assessment and post-assessment
- Teacher developed rubrics for writing and oral skill mastery
- Math Fact Fluency Assessment goals by grade
- RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP)
- Saxon Math Progress Monitoring Assessments
- Student Report Cards and progress monitoring
- Historic review of NC state assessment results by grade band

Assessment and Screening – Special Populations: Students already enrolled in the Trinitas Academy special education programs will be monitored with quarterly progress reports that are documented and shared with the classroom teacher, administration, and the parents/guardians of the student. Annual reviews of the IEP will occur, and determinations will be made if reevaluations and adjustments are required.

Assessments utilized to determine eligibility (not limited to this list)

- Wechsler Intelligence Scale for Children – Fourth Edition
- Wechsler Nonverbal Scale of Ability
- Woodcock-Johnson – Normative Update Complete
- Test of Written Language – Fourth Edition
- Vineland Adaptive Behavior Scales – Second Edition
- Diagnostic Adaptive Behavior Scale
- Speech and Language evaluative tools
- Clinical Evaluation of Language Fundamentals – Fifth Edition



- CAAP-2

Teacher Ownership Of Data-Driven Instruction

The teacher conducted 8 Step Data Interpretation Plan, which shows the teachers how to interpret class-wide, small-group, and individual learning needs. This is the first step in a Data-Informed Instructional school. The 8-Step Data Interpretation Plan includes review by grade level teachers and communication to the home and with the students. The plan culminates with goal setting with the students and class and reporting and monitoring those goals to the Academic Accountability Committee (AAC). To be a great school, we must have systems in place to inspect what we expect.

Data Informed Instruction. Using internal assessment data, the teacher and Academic Accountability Committee (AAC) can quickly isolate low scores and determine if the issue is curriculum-based or isolated to a particular instructor or classroom. With a curriculum that is paced correctly and calls out the various standards to be focused on during the particular unit, we can ensure that we have a common foundation across the school.

Strategies To Ensure Data Implementation:

1. Study Hall or one-on-one tutoring with the teaching staff. All teaching staff is contractually required to schedule two hours per week for tutoring.
2. Purposeful Pause in content delivery if portions of a class need assistance.
3. Dedicating class time to differentiate in 'Crash Course' by strand instruction.
4. Advanced (Gifted and Talented) student strategy to challenge students who can advance beyond their grade level.
5. Differentiated Instruction – and the training needed for all teachers to implement differentiation techniques in their classroom successfully.
6. Progress monitoring with additional testing on standards that need additional support.
7. Move to the Intervention department under a pull-out model. Third-party cloud-based subscription services like iStation, iReady, Study Island, and Wilson Foundations.
8. Parent Volunteers and or tutor club.

CULTURE

Character formation is a major focus of the Governing Board and a component of our mission statement. We will implement a detailed effort to integrate character education into our classrooms and school-wide. This implementation includes a 10-part Plan as follows:

1. **Language-based curriculum is delivered through a strong classical literature-based curriculum.** By using classical literature and fables, students learn through the power of time-tested moral stories. Societies have used the power of stories to teach the next generation right from wrong for over 5000 years. The expansion of vocabulary and the ability to internalize these deep, rich stories into everyday life is the foundation of the Trinitas Academy character program.[1][2] Critical to the Trinitas Academy model will be a comprehensive Social Emotional Learning program that includes lesson plans, character education discussion prompts, and training tools for teachers to incorporate into their ELA, history, and, in limited cases, science lessons.
2. **Monthly School-Wide Focus on 2 Values/Virtues** – As part of the Trinitas Academy character plan, the school will spend one month focusing on developing two values and virtues. The Governing Board started with Ben Franklin's 13 Virtues (published in his 1720 autobiography) and tailored the options to include 20 values/virtues throughout the year. Teachers and students spend intentional time with two featured values/virtues each month. The in-depth analysis includes schoolwide exercises and classroom discussion on the focus values/virtues. Students walk through what each value/virtue means, the alternatives, and how their actions affect the students around them.
3. **Positive Language, Relationships, and Discipline** – This method uses the works of Dr. Rudolf Dreikurs and Dr. William Glasser as a foundation for character development. These are rooted in the "why" of anti-social behavior and the importance of how we react as a school community to poor behavior. The nuances of language choices and the power of relationships and high expectations are the root of both philosophies. Dreikurs states that "his goal may occasionally vary with the circumstances: he may act to attract attention at one moment, and assert his power or seek revenge at another" (Dreikurs, 1968, p.27)[3]
4. **School Climate Approach** – Character education and Bullying prevention do not stop in the classroom. An effective culture program should incorporate every aspect of a student's day on campus. From orderly transitions in the hallways, holding doors



for other students or adults, to the custom of using please and thank you, to cleaning up lunch the room and modeling the appropriate behaviors on the playgrounds, there are large and small parts of every student's day that should emphasize the school's cultural norms.

5. **Visual Reinforcements of Character Models** - As part of the rollout of the Trinitas Academy character program, numerous visual reinforcements in the classroom, on the hallway walls, and in the lunchroom and play areas will be an important reminder of what the school holds as important. Visuals will be custom-designed to tie in with the famous stories from history that are studied in the classrooms to reinforce character messages.

6. **Teacher Aligned and Integrated Support - Materials available in Schoology LMS include values and virtues lesson plans, prompts tied to novels, campus-wide programs as standalone modules, or for maximum impact embedded in the traditional ELA, History and Science, and lessons.** The curriculum-embedded approach lets teachers and students move seamlessly through NC standards and character instruction. There is a high degree of teacher flexibility in our character education plan. No one knows their students and what the classroom needs moment by moment better than the teacher in the classroom. Specific professional development training will occur before the launch of the school year and will be ongoing to support the teachers' mastery of character development learning opportunities.

7. **Parental Involvement** - Parent engagement is paramount for the success of any educational or character-based program. Part of the Trinitas Academy character education plan involves parental outreach and a focused effort to engage parents with on-campus activities and service projects. Partnering with families and the community is critical to the Mission/Vision set forth by the Trinitas Academy Governing Board. The study of growth mindset and engagement of students in their learning has shown promising results in increasing student outcomes, rising above socioeconomic or home life challenges, and creating a sense of belonging on a school campus.

8. **Students Ownership of Culture - Trinitas Academy House System** - to achieve the goal of involvement from parents and ownership from students, Trinitas Academy will roll out a house system with the school's launch. The concept has been tested and is inspired by the ideals of republican participation, shared leadership, and civil service. Specifically, the Trinitas Academy House System exists for three purposes:

1. To allow students a system where they can belong, collaborate, and serve.
2. To allow families an organizing structure to build community, celebrate learning, and give back to their local school.
3. To sponsor school events and other school needs with the creativity, energy, and leadership of family volunteers in each grade level.
4. Similar to how the curriculum is organized by historical time period following a 4-year cycle, students in each grade level will belong to a House (called by the Latin "Domus") in partnership with the other grade level studying the same period in history each year. Houses are encouraged to seek outside service projects beyond the campus. Suggested activities include visiting retirement homes, volunteering in local parks, connecting with local service clubs like Top of the Lake Rotary, and more.

9. **Foundations Rooted in Stoic Philosophy** - The Stoic model of education—derived from the works of Seneca, Epictetus, and Aurelius - focuses on education as knowing yourself and the importance of logic and critical thinking in decision-making. In the tradition of the Stoic philosophy, education is preparation for life, and knowledge is integrated into private, local, and global understandings. School leaders, teachers, and staff will be hired and expected to exhibit the Stoic ideals we teach in the classrooms.

10. **Culture Review and Monitoring Committee (CRMC):** Many states mandate mental health awareness programs and suicide prevention instruction. The root of these initiatives is a plan to monitor the mental health of our students. The CRMC will meet quarterly and include school leadership and staff members. The CRMC is organized with specific goals, actionable data to review, and tools to implement, all aimed at improving the overall culture at a school. The CRMC will be responsible for:

1. Training staff on best practices in dealing with student mental health issues, the role of Adverse Childhood Events (ACE's) on our student population
2. Formal staff training on the signs of suicide or crises in our students.
3. Roll out and monitor the Character Education programs (in a classroom, campus-wide, and community engagement)
4. Develop a culture of 'see something, say something' among the staff regarding our students.
5. Identify local community service providers and engage these services for our school's students, staff, and families.
6. Conduct an annual stakeholder survey using the Net Promoter Score (www.netpromotersystem.com (<https://www.netpromotersystem.com>)) methodology to assess the school's culture.
7. Monitoring with goals of first-time discipline referrals to the following targets;
 1. Year 1
 2. Year 2
 3. Year 3



- 4. Year 4
- 5. Year 5

The CRMC will make quarterly reports to the Trinitas Academy Governing Board on the above initiatives, their effectiveness, and any areas of weakness.

- [1] Carr, David & Harrison, Tom (2015). *Educating Character Through Stories*. Imprint Academic.
- [2] Bohlin, Karen (2005). *Teaching Character Education Through Literature*. Psychology Press.
- [3] Dreikurs, R., & Loren, G. (1968). *A new approach to discipline: Logical consequences*. New York: Hawthorn Books.

Oversight

The Trinitas Governing Board has established the following processes, subcommittees, and reporting periods for the school's academic, financial, and governance oversight. These goals are a framework and may change from time to time depending on board composition or State of North Carolina policy changes that may affect the school.

Academic Oversight: As part of the academic oversight role of the Governing Board, the members will understand the academic goals established with the Principal and the Governing Board. Academic goals established will include increases in academic performance over State of North Carolina averages and against peer schools in the Iredell School District. These goals will be reviewed annually, considering the board policy statement on what academic success looks like at Trinitas Academy. The school Principal will train the Governing Board on the academic accountability framework used by the State of North Carolina Department of Education. At least quarterly, the Principal will compile an academic progress report, including benchmark data, to the Governing Board (through and in conjunction with the Academic Sub-Committee) with any benchmark data that may be pertinent.

Establishment of a Board Academic Sub-Committee: The Academic Committee of the Governing Board will be established and shall consist of at least one Director/VPricipal, School Principal/Administrator.

The Academic Subcommittee shall meet at least four (4) times per school year. Its purpose is to review school data, ensure academic expectations and goals are being met, and provide insight into instructional activities that meet students' needs.

The Principal will be tasked with creating a school-based Academic Accountability Committee (AAC). This committee will review benchmark data, teacher observations, and end-of-year NC State testing and prepare a report for the Board Academic Subcommittee. This report will provide insight into curriculum effectiveness, professional development plans, and additional resources needed to address academic targets and review the performance of special populations (ELL, special education, gifted).

Each year, the Governing Board will review a report from the Academic Sub-Committee end-of-year State of North Carolina, assess results, and establish academic goals. These goals will review past academic data, analyze the school's data against their peers, examine the State of North Carolina's average test results, and incorporate any new policy or laws enacted by the State of North Carolina. These goals will be monitored and become a part of the Principal's annual performance review.

Financial Oversight: The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. As part of the Governing Board's financial oversight role, the Principal will orient all new board members to the fiduciary role of a non-profit Governing Board. The Trinitas Governing Board will monitor break-even enrollment numbers and preliminary and annual budgets as presented by the Principal. As part of long-range planning for the school, the Governing Board will monitor a 5-year projected budget and analyze future needs that may significantly affect the budget.

Establishment of Finance Committee: The Finance Sub-Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer and the School Principal. The Finance Sub-Committee shall meet at least two (2) times per school year. The Finance Committee shall prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly, analyzing the profit and loss, balance sheet, and budgeted vs actual. The Trinitas Governing Board wants to contract with an outside account group



with experience with North Carolina public charter school accounting.

The Governing Board will establish financial policies and procedures and compile a manual to guide the Principal and school operations. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

- Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
- Computer, word processor, typewriter, or ink will complete all documentation related to financial matters.
- The Governance Sub-Committee can appoint someone else to perform the Principal's responsibilities in the case of absence.
- Establishment of a Purchasing Policy - The Principal's may authorize expenditures and sign related contracts within the approved budget. The Governing Board must review all spending in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
- Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, and asset management are all policies that will be established by the Governing Board and executed by the Principal's.
- Petty Cash and Credit Card Use Policy will be established using a framework that is generally acceptable to Charter School cash handling procedures.
- Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of the need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the best interests of the school.) Written contracts clearly define the work to be performed and will be maintained for all contract service providers (i.e., consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Principal's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Principal's will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Principal's and/or Member(s) of the Governance Sub-Committee with the conflict will excuse themselves from discussions and voting on the contract.[1]

The Governing Board will commission an annual financial audit by an independent third-party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the North Carolina Department of Education. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year-end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

1. An audit of the accuracy of the financial statements
2. An audit of the attendance accounting and revenue accuracy practices
3. An audit of the internal control practices

Governance Committee: The Governance Sub-Committee shall consist of at least two Directors and the Principal. The Governance Sub-Committee shall meet at least two (2) times per school year. The purpose of the Governance Sub-Committee will be to plan and develop Board Member orientation and training, identify and qualify new Governing Board members based on the approved recruitment policy, and ensure Board operations and policies are updated and compliant with State law. The Governance Committee will be responsible for board membership and population of new members to meet the strategic objectives the Trinitas Governing Board set forth.

- Annual election of officers and oversight of their engagement and scope of duties.
- Training and onboarding of new board members.
- This section explains the details of monitoring school reporting (ACC committee, Academic committee, Finance committee).
- Compliance with legal requirements for the State of North Carolina and the IRS.

[1] National Charter School Resource Center

Q123. How will the governing board know that the proposed public charter school is working toward attaining



their mission statement?

The charter school governing board can confirm that the Trinitas Academy is working towards achieving its mission statement by monitoring the indicators and implementing the following specific strategies:

- Alignment with the mission: Ensure that the school's programs, initiatives, and decisions align with the stated mission and purpose of our school, including academics, Classical Education fidelity, and student services.
- Ongoing progress reports: Require quarterly or annual updates from the administration regarding the school's progress in reaching its mission objectives.
- Data analysis: Analyze data related to student achievement, attendance, behavior, and other relevant metrics to evaluate whether the school is making strides toward its mission. Academic rigor that is aligned to our scope and sequence and monitored using our detailed assessment and board monitoring program. Oversight of special populations, including IEP, ethnic populations, and gifted and talented students, with detailed identification and monitoring plans prescribed in this application.
- Observational visits: Schedule regular visits to classrooms and observe teaching methods, student interactions, and the general atmosphere to gauge alignment with the mission.
- Stakeholder feedback: Collect input from parents, teachers, students, and community members to gain insights into the school's effectiveness in realizing its mission.
- Goals and benchmarks: Establish measurable goals and benchmarks based on the mission statement and track progress against these targets. Metrics include agreed-upon 5-year enrollment targets, 5-year academic goals, cultural goals (including parent satisfaction survey and parent community engagement), student retention, and teacher retention.
- Professional development: Encourage continuous professional development for faculty and staff to support the realization of the school's mission as prescribed in our charter application. This metric will include an annual review of curriculum needs aligned with academic performance. The board's goal will include an 85% teacher retention rate by year 5.
- Collaboration with stakeholders: Foster collaboration between the school and external organizations, such as universities, businesses, and local government agencies, to leverage resources and expertise in pursuit of the mission. This goal will be monitored as part of the site Principal's performance review.
- Transparency: Maintain open communication channels with the broader community to share progress and solicit feedback on the school's efforts to achieve its mission. Compliance with North Carolina open meeting laws will be included in this metric.
- Board Self Appraisal Periodic evaluation: Perform regular self-assessments to identify areas for improvement and adjust the course accordingly. The board governance committee will conduct this metric. Financial viability with board finance committee monitoring and reporting. Regulatory compliance with the State of North Carolina



10. Educational Plan

10.1. Instructional Program

Q124. 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



Curriculum and Instruction

The selection of the instructional materials and instruction program uniquely aligns with Trinitas Academy's mission statement in that the interconnection of disciplines and focus on the full liberal arts education prepares students for the society of the future. Through a deep exploration of rich literature and a focus on the arts, Trinitas students learn what is good, true, and beautiful and how their actions impact the community. Character development (Social and Emotional Learning) is an ongoing part of the Trinitas learning experience.

With a focus on the Socratic teaching methods, Trinitas puts student-led discussions at the forefront of the model. This student-centered approach helps students refine their communication skills and better understand various subjects. Prior knowledge, the interconnection of facts, and the application of the knowledge learned are the skill sets that the classical model builds in students. Trinitas Academy will implement time-tested Classical pedagogy with research-backed choices on ELA, Math, and Science curriculum and teaching methods.

Operationally, Trinitas Academy will employ a comprehensive program to ensure quality instruction including.

1. Quality teacher recruitment and detailed Professional Development offerings.
2. Ongoing monitoring of curriculum, academic growth, and teacher impact using the LoTi teacher evaluation tool.
3. Quality data capturing metrics that help design and improve instruction (iReady and NWEA MAP)
4. Detailed intervention strategies using MTSS/RTI, a framework with special interventions for Tier 3 students, ELL, and Special Education populations.
5. The quality curriculum is aligned with NC State Standards with customization for remediation, acceleration, and special populations.

The Schoology cloud-based Trinitas Governing Board is the school's Learning Management System (LMS), which organizes and supports the teaching staff in lesson planning and resource support. With Schoology, teachers can enroll students in blended classrooms or use the tool for resource acquisition and lesson planning. The Trinitas Governing Board will determine the framework for digital tool usage, recognizing that Classical Education is primarily about a book in the student's hand but understanding the role of technology in the future of their student's lives.

Curriculum Alignment with Mission/Vision: The Framework For Trinitas Academy's Academic Program Design. The end goal of the academic, athletic, community service, and character education programs implemented at Trinitas Academy will be built out on the framework of the following goals:

1. A focus on deep learning rather than shallow knowledge.
2. The ability to assess mastery using several measures detailed in this application.
3. Addressing the needs of all students regardless of socioeconomic circumstances, ELL designation, or identified learning adaptation.
4. A focus on innovative learning methods that are rooted in the Classical Education framework but account for technological advancements in our modern times, a focus on problem-solving skills, all with a goal of higher-order thinking.
5. A balanced instruction approach from Socratic to direct instruction, small group-based learning.
6. Character development is integrated into everything we do at Trinitas Academy. Whether in the classroom, the lunchroom, or on the athletic fields, it is an everyday role for all school staff members.

Curriculum and Instruction Alignment with Mission/Vision: Trivium Stages of Learning: Trinitas Academy chose the Classical Education model because it blends academic rigor with a deliberate focus on character education. The role of a teacher in a Classical school is to encourage risk-taking, exploration, and deeper learning. Beginning in the early grades of K-5, teachers blend direct instruction with Socratic discussions with the goal of students exploring the subject matter that interests them all within the preplanned scope and sequence. A classroom experience will have limited direct instruction, followed by individual or small group analysis of the topic, and then include classroom-wide discussions. The Grammar stage of the Trivium is where the foundation around math facts and concepts, as well as grammar conventions, vocabulary, comprehension skills, and early writing, are taught and memorized. In the 5th to 8th grades, there is a minor focus on direct instruction and a greater emphasis on Socratic and student-led individual and group projects. Each band of the Trivium in a Classical school naturally follows age-appropriate learning styles. Recitation and jingle-based learning begin in 1st grade and help young students master concepts that will be referenced as they grow in the Classical model.



Curriculum Alignment with Mission/Vision: English Program - The Trinitas Academy English program draws from works of literature from American, British, and world literature and classics. All literature courses will be built around the novels selected in the particular course. Young Adult Contemporary classics and traditional classical literature have been chosen based on the grade level, novel Lexile score, and the time period of the novel matched to the history theme. These novels will be used to construct classes that discuss themes relevant to students and that are aligned with the school's mission, vision, and core values. Each model novel lesson will include components of literary analysis (theme, plot, arc, character development), grammar (foundational grammar and sentence structure lessons followed by grammatical editing and conventions), vocabulary (taken from the novel with Lexile-appropriate text as well as high frequency misspelled words for that grade level and a focus on Latin root words.), and writing (prompted from novel themes, focused on a repeating pattern of Narrative, Opinion, Informative and Creative writing conventions).

Kinder to 3rd Grade ELA. students will receive daily English instruction equal to no less than 135 minutes per day. Our program requires three 45-minute segments. The segments involve (1) a daily interactive read-aloud with time for grammar and writing instruction. The text choices are above grade level, and teachers will be trained to make these read-alouds interactive. Additional time in this 45-minute block will be used for writing and learning grammar conventions, with the read-aloud text as a guide. (2) A daily shared reading lesson involves students following along with the teacher and doing word studies for difficult words found in the text. This segment involves partner reading as well. And (3) small-group differentiated instruction occurs during the third 45-minute block. Using assessment tools, including DIBELS, the teacher will group students at reading levels and work through struggling readers as needed. During ELA lessons, students are introduced to the objectives, which are aligned with NC State standards and easily found in the Schoology LMS for each unit.

In Kinder to 3rd Grade, the focus of the ELA program is on encoding, decoding, comprehension, and making connections to fiction and non-fiction text. Dr. Sharon Walpole developed the ELA framework with the University of Delaware's support. It is available as an open-source platform with customization of literature choices to match our Classical model. The protocol of the K3 ELA program will include evidence-based practices that enable teachers and students to focus on building foundational skills, fluency, comprehension, and knowledge. The curriculum offerings, pacing, and teacher support include:

1. Balanced literacy choices between fiction and non-fiction.
2. Heavy focus on real books that are leveled and readily available. Lessons, research, writing, large group, and small-group activities are based on the literature provided in each classroom.
3. The use of songs, jingles, and chants to anchor foundational skills.
4. Teacher-directed read-alouds are a daily occurrence and part of the Charlotte Mason influence on the Classical model.
5. Vocabulary and grammar skills are introduced, memorized, and learned weekly through the assigned literature. Latin root words are introduced in 3rd-grade spelling.
6. Phonetic awareness is introduced in early kinder and 1st grades and as remediation where needed (in small groups).
7. Whole class and center-based reading time is embedded in each day.
8. Value and virtue prompts that coincide with campus-wide social-emotional learning are integrated into projects, Socratic discussions, and writing prompts. Writing in a Classical school is a frequent occurrence across subjects. The scope and sequence mapping calls for a rotation of opinion, narrative, expository, and research-based writing to occur not only in English but also in history and science (lab journaling/research).
9. In-class differentiation occurs in small group times, and intensive intervention strategies are employed on the lowest 20-30% of readers.
10. Students have a grade-appropriate poem they recite individually and as a class, starting in kindergarten and continuing to 8th grade.

The ELA program was chosen because it has been proven to build early readers and a strong ELA foundation. [1] [2]

1. Utilizes all learning styles: visual, auditory, and kinesthetic.
2. Never teaches isolated concepts.
3. Incorporates student/teacher interaction.
4. Uses repetition to attain mastery.
5. Challenges accelerated students.
6. Promotes higher-order thinking.
7. Provides the connection between grammar skills, writing, and effective speaking.



Handwriting (K-5 to Mastery): Handwriting is introduced in kindergarten and developed throughout grades 1-6. Cursive writing is introduced beginning in grade 2. Attentiveness to detail, correct formation, and overall neatness are emphasized at each grade level.

ELA Program 4th to 8th Grades. For grades 4 to 8, the ELA program is aligned with 6 to 8 classical novels. These novels have a Lexile reading level that is just above grade level. From the novel study, the curriculum program has customizable lessons to address the major components of an English program. Each novel has a featured writing prompt (Argumentative/Persuasive, Explanatory/Informative, Narrative, and Research) that the students work on from prompts in the novel. These writing prompts are also scheduled into their history instruction and, when appropriate, into science, music, and art. In addition to writing, teachers follow the NC State Standards' scaffolded standards for literature analysis, grammar, vocabulary, and presentation skills.

These NC standards are found in each unit, such as exit tickets and an 'I Can Statement.' Themed units are aligned to one or two novels, which allow the teacher to introduce compare and contrast prompts and allow the student to integrate historical source documents, plays, poems, and excerpts from other classical works of literature into their unit.

The ELA block is also 135 minutes and likewise is broken down into three 45-minute segments.

- **Block 1.** Additional time in this 45-minute block will be used for writing and learning grammar conventions, with the read-aloud text as a guide. The text complexity is increased in read alouds.
- **Block 2.** A daily shared reading lesson involves students following along with the teacher and word study to include selected Latin root words as prescribed. This segment involves partner reading as well.
- **Block 3.** Small-group differentiated instruction occurs during the third 45-minute block. By this stage, our NWEA-MAP benchmark data will drive ability grouping, and where the teacher will focus on small group differentiation. Read alouds become optional in grade 6, and more student choice is built into the plan.
- **Writing Skills:** Writing occurs not only in English but also in History and Science. The teacher grading distribution must include at least 10-20% of the student's grade (depending on the grade band) in these subjects, including journals, research papers, presentations, and scientific notebooks. ELA will focus on balanced literacy between fiction and non-fiction. History and science will primarily focus on literacy standards and feature informational text and historical source documents, all of which are identified and provided for the teacher. Logic is a hallmark of classical education schools, beginning in the 6th grade and continuing to the 8th grade. The Logic units introduce students to the foundations of argument, fallacies, and various argument forms. Logic has a heavy focus on written and oral presentations and defense of a point of view.

Curriculum Alignment – Mathematics - In math, Trinitas teachers will have grade-by-grade NC State math standards and a number of resources to support the goals of teaching math. The school will provide the following options for math instruction.

The primary plan for math will be a pre-designed scope and sequence with grade maps that the teachers will follow to allow for grade-by-grade scaffolding of concepts toward mastery. The focus in math instruction will be on the Operations and Algebraic Thinking, Number and Operations in Base Ten, Measurement and Data, Geometry, Number and Operations, Fractions (beginning with limited mastery in grade 4), and Financial Literacy. Math will occur in the allotted class time, but we believe math should be introduced in other subjects as well. In science, measurements, math facts, fractions, and basic computations are a natural connection to mathematical learning. Statistics are becoming more and more important as students continue their education. Because of this trend, we are training teachers and requesting that they look for opportunities to include statistical analysis (graphics, charts, data analysis) in their history, science, and other subjects.

The Trinitas professional development and instructional expectations are that teachers organize their math instruction in five daily activities: morning routines, fact practice, an explicit lesson, guided class practice, and homework. For support, we will make the iStation math resources, Singapore math, and Saxon math textbooks available.

In developing the mathematics program for the Trinitas Academy math program, the founding group looked for a program explicitly aligned with the school's philosophical approach, specifically:

1. Integration of conceptual understanding, computation fluency, and problem-solving skills. These traits are critical for building a math future for students and passing the NC State exams.
2. Proficiency in mastery of whole-number operations, fluency with standard algorithms, and understanding of core math laws of operations. Sufficient opportunities for practice with whole-number operations are necessary to develop automatic recall of core math tenants.



3. A strong differentiation program can improve math learning of all students in the classroom and interventions that address social, affective, and motivational factors.
4. Professional development for teaching staff with emphasis on using frequent assessment data to plan remediation and pacing. Our rationale for building the math program draws heavily from research which indicates that students who are taught with a mathematics curriculum that uses continual practice and review demonstrate greater math achievement and skill acquisition than do students who are taught with a mass approach (Good & Grouws, 1979; Hardesty, 1986; MacDonald, 1984; Mayfield & Chase, 2002; Ornstein, 1990; Usnick, 1991).

Math Schedule – Kinder to 8th Grade - Math is the second largest block scheduled for mornings, with 90 minutes in K-5 and 60 minutes in 6th to 8th each day of instruction per week. Within the math block, instruction will be purposeful and spiral concepts from prior lessons with new concepts. This spiraling aspect spends the first part of the year (25% to 33% of the year's total lessons) on prior knowledge and foundational concepts needed to master the current year's concepts. Prior standards are continually brought back in with the goal of building deeper understanding and mastery. Research also suggests there is value in a teaching method that uses small, easily digestible chunks of information within its lessons (Ausubel, 1969; Brophy & Everton, 1976). Studies by Rosenshine and Stevens (1986) and Brophy and Everston (1976) demonstrated the importance of using incremental steps when teaching new information. Effective concept development involves incremental skill instruction distributed throughout a school year.

The structure in the classroom for math instruction will be a balance of INSTRUCTION, PRACTICE, and ASSESSMENT. Every 10 lessons, an assessment is given to check the class for understanding and to give the teacher feedback on how concepts are being retained. Continual, distributed practice ensures that concepts are committed to students' long-term memory and that students achieve the automaticity of basic math skills. Several research studies show that students who are taught with a mathematics curriculum that uses continual practice and review show greater skill acquisition and math achievement[3]

Curriculum Alignment with Mission/Vision: Science Program -

The science program at Trinitas Academy follows a pattern of one full year of Earth Sciences, Biology, Chemistry, and Physics. The science scope and sequence will include a primary focus on biology in the 1st and 5th grades, earth sciences in the 2nd and 6th grades, chemistry in the 3rd and 7th grades, and physics in the 4th and 8th grades. In addition to the primary science focus by grade, each teacher will incorporate science standards prescribed by grade in accordance with the NC State standards. The teacher will be responsible for grading and promotion of the students from the course.

The science curriculum will prepare students to achieve the NC State Standards mastery of science concepts prescribed for each grade level by incorporating an inquiry-based approach to learning the central science themes: matter and energy, force and motion, earth and space, processes of life, and the scientific method. Classroom teaching strategies will emphasize active learning, both individually and in groups. Students will engage in problem-solving, communication, and reasoning through experiments, modeling, investigations, and real-world applications. All science coursework is designed to promote a sense of inquiry through laboratory experiences and to further develop critical thinking skills. Science courses will heavily emphasize the major scientists and discoveries surrounding the various units of learning. Scientific advancements' ethical and moral implications are embedded in lessons for teachers to bring historical perspectives and moral debates into the science classroom. Emphasis will be paid to the use of laboratory techniques, terminology, and relationships between scientific and mathematical disciplines.

Curriculum Alignment with Mission/Vision: US Citizenship Exam – The goal for a graduating 8th Grader will be to score 85% on the 100-question US Citizenship exam. Beginning in 5th grade, up to 25 questions will be introduced and studied per year. Aligning the focus questions to the particular historical theme unit is part of the curriculum mapping. US Citizenship Exams are not related to any requirements for citizenship, but the Governing Board believes Trinitas Academy students should leave the program with a higher level of understanding of the American experience.

Curriculum Alignment with Mission/Vision: History Exit Tickets - Each unit of history (1 month) from 1st to 8th grade has an accompanying Exit Ticket for completion of the course. These Exit Tickets are what the instructor designs their history instruction around. Trinitas Academy believes that history is more than dates and events, and we will encourage history instructors to make each time period come to life. Each month-long unit has content created using the S.P.R.I.T.E. (Society, Politics, Religion, Intellectual, Technology, Economic) model. Prior to opening, inside the Schoology Learning Management System, there will be available for the teacher lesson plans, short videos, long-form documentaries, source documents, and close reading materials for



instructors to choose from in arriving at the Exit Ticket goals. Specific add-on modules for Economics, Geography, and State of North Carolina-specific skills will be included for teacher lesson preparation.

Curriculum Alignment Special Areas: Art, Music, Physical Education - Students at Trinitas Academy will participate in structured art class, music, and physical education classes. Art will have an emphasis on art appreciation. The principles and fundamentals of art will also be taught. Music will have an emphasis on music appreciation and chorus in the upper grades. Art and music themes are aligned to the period in history studied by the particular grade band.

Curriculum Alignment with Mission/Vision: Character Education - The Trinitas Classical Academy Governing Board chose the Classical Educational model because of its balanced focus on academic achievement and character education. The school will launch a 10-step character education program that incorporates research and best practices on effective Social and Emotional Learning.

1. **Language-based curriculum is delivered through a strong classical literature-based curriculum.**

2. **Monthly School Wide Focus on 2 Values/Virtues** -

3. **Positive Language, Relationships, and Discipline** -

4. **School Climate Approach** -

5. **Visual Reinforcements of Character Models** -

6. **Teacher Aligned and Integrated Support**

7. **Parental Involvement**

8. **Student Ownership of Culture - Trinitas Academy House System** -

9. **Foundations Rooted in Stoic Philosophy**

10. **Culture Review and Monitoring Committee (CRMC)** Many states are mandating mental health awareness programs and suicide prevention instruction. The root of these initiatives is a plan to monitor the mental health of our students. The CRMC will meet quarterly and include school leadership and staff members. The CRMC is organized with specific goals, actionable data to review, and tools to implement, all aimed at improving the overall culture at a school. The CRMC will be responsible for:

1. Training staff on best practices in dealing with student mental health issues, the role of Adverse Childhood Events (ACE's) on our student population

2. Formal staff trainings on the signs of suicide or crisis situations in our students.

3. Roll out and monitor the character education programs (in a classroom, campus-wide and community engagement)

4. Develop a culture among the staff of '*see something, say something*' when it comes to our students.

5. Identify local community service providers and engage these services for our school's students, staff, and families.

The CRMC will make quarterly reports to the Trinitas Academy Governing Board on the above initiatives, their effectiveness, and any areas of weakness.

Teacher Curriculum Resources: The Schoology LMS will have a series of curriculum resources and support materials to complement the selected textbooks detailed in this section. Schoology has day-by-day sample lesson plans and add-on resources (PowerPoints, documentaries, Socratic discussion prompts, source documents, etc.) that the teacher can use off the shelf or customize to the student's pacing and interest level.

Curriculum Alignment with Mission/Vision: Latin Instruction - Students at Trinitas Academy will be instructed in the Latin language as laid out by The American Classical League, The American Philological Association, and Regional Classical Associations. [4] Standard 1 is to read and understand the Latin language, standard 2 is to understand the Roman culture and the foundations of the Latin language, standards 3 and 4 are to integrate and recognize Latin origins across subject areas. Standard 5 is to integrate their knowledge of Latin into their community. Latin language instruction has been found to have lasting impacts on SAT scores and student achievement, and Trinitas students will learn the language starting in Grade 3.

Other benefits of providing instruction in Latin include:

1. **Better SAT Scores.** In 2002, The College Board published a newsletter stating that the mean Verbal SAT score for those who took the SAT II Latin Test was 666, compared to the national average of 504. Students who took the French SAT II Test achieved a mean verbal score of 637, compared to the 581 achieved by students who took Spanish. Likewise, those who majored in "Classical Languages" or "Classics" and took the GRE between 1996 and 1999 scored the highest in over 270 fields in the Verbal section.[5]

2. **Improvement in Science.** According to the Association of American Medical Colleges, students who major or double-major in



Classics have a better success rate getting into medical school than do students who concentrate solely in biology, microbiology, and other branches of science" (Princeton Review).[6]

3. **Increased Vocabulary.** *In 1971, more than 4,000 fourth-, fifth- and sixth-grade pupils of all backgrounds and abilities received 15 to 20 minutes of daily Latin instruction. The performance of the fifth-grade Latin pupils on the vocabulary test of the Iowa Test of Basic Skills was one full year higher than the performance of control pupils who had not studied Latin. Both the Latin group and the control group had been matched for similar backgrounds and abilities.*[7]

Latin and ELL Populations. Trinitas Academy will target communities with at least 20% Hispanic populations, according to the US Census data. Research out of Penn State Center for Language Science found that lessons in the Latin roots of words may help Spanish-speaking students who are learning English bridge the gap between the two languages. [8] Latin instruction is an integral part of the Trinitas Academy classical school. Using Latin to bridge the gap for ELL students is one more tool to address the growing Hispanic population in the Pearland area.

- [1] S.Giancola, S.Jelenewicz, J. Klein, G.Mora, K.Morrison, D.Riser, A.Sarfo. Bookworms Case Study. Univ of Delaware CRESPI Study. Jan. 2019.
- [2] EdReports.org (2017) <https://www.edreports.org/reports/overview/bookworms-2017> (<https://www.edreports.org/reports/overview/bookworms-2017>)
- [3] Research – Behind the Difference That Gets Results. Saxon Math. HMCO Publishers.
- [4] Standards for Classical Language Learning, A Collaborative Project of The American Classical League and The American Philological Association and Regional Classical Associations. (1997)
- [5] A Case for Classics In Middle School, Rucculo. John Hopkins School of Education (2004)
- [6] Classics! Princeton Review - <https://www.princetonreview.com/college-majors/64/classics>
- [7] Latin in the Elementary School: A Help for Reading and Language Arts, Nancy A. Mavrogenes. The Phi Delta Kappan. Vol. 60, No. 9 (May, 1979), pp. 675-677
- [8] Penn State. "Latin may help students bridge their native language with English." ScienceDaily. ScienceDaily, 4 October 2018.

Q125. Will the proposed charter school serve a single-sex student population?

- Yes
- No

Q129. 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.



Classical education is structured around the trivium, consisting of three stages: grammar, logic, and rhetoric. In the grammar stage (K–3), students focus on memorization through math conventions, grammar, poetry, songs, and chants. The logic stage (grades 4–8) involves questioning and argumentation, teaching reasoning and logic. The middle school focuses on independent thinking and communication skills. In all learning stages, English instruction is the largest block. The thematic units aligned to historical time periods allow a seamless transition from history to English with heavy emphasis and deeper learning. In the rhetoric stage, students build arguments to express original ideas. By this stage, older students have developed strong vocabularies and reading comprehension skills. Our teachers in the rhetoric stage require students to critically analyze the meanings supported by a text and then bring their own ideas to the subject. With a firm knowledge of history, Classical Education accomplishes three objectives:

1. Helps students inform current events and how we arrived at the current moment.
2. Understanding history puts the student's community, country, and our place in global civilization in perspective.
3. History points to successes and failures, which offers lessons to students as future history makers.

For a classical education model school serving various grade spans:

Elementary School (K-3th Grade): In this Grammar Stage, children focus on repetition and routine to establish foundational learning in subjects like reading, grammar, and mathematics. The grammar stage has more direct instruction, small groups, and differentiation as needed, with a gradual introduction to Socratic discussions. Technology is limited by teachers bringing in Computers On Wheels (COWs) as necessary to supplement instruction.

Middle School (4th-8th Grade): The Logic Stage applies the fundamentals learned in the Grammar Stage to develop critical thinking skills through debate, reasoning, and logic. 8th grade begins transitioning to the Rhetoric Stage, emphasizing independent thinking, persuasive speaking, and effective writing to prepare students as communicators and scholars. The Logic and early Rhetoric stages of learning will involve less direct instruction and more group or Socratic classroom time. Technology is limited by teachers bringing in Computers On Wheels (COWs) as necessary to supplement instruction. The curriculum provider, Ethos Logos Publishing, offers a full suite of digital courses aligned to print materials, allowing teachers to introduce flipped classrooms and 'follow along at home' content.

Class sizes are planned to be 26 students per class. Teacher ratio is 19 to 1.

Specials, which will include art, music, Latin, and physical education, will be provided with 2 classes scheduled for one week, three classes planned for the next week, and so on.

Q130. Identify how this curriculum aligns with the proposed charter school's mission, targeted student population, and North Carolina Accountability Model. Provide evidence that the chosen curriculum has been successful with the target student population, how the plan will drive academic improvement for all students, and how it has been successful in closing achievement gaps.



The classical education curriculum that Trinitas Academy is implementing aligns well with the school's mission of providing a rigorous, virtue-based education based on the tenets of Western Civilization.

Alignment with School Mission

The key elements of the classical education curriculum that support the school's mission include:

Emphasis on Wisdom and Virtue: The mission statements highlight the goal of "cultivating students of wisdom and virtue" through a "content-rich classical liberal arts education."

The curriculum focuses on developing the "whole person" and equipping students with "strong moral character and civic responsibility." These values and virtues are integrated into all aspects of a student's day. From the announcements on the loudspeaker to the Socratic and written instruction in the classroom, to the playground and athletic fields, values and virtues are featured and embedded in a student's time on campus.

Rigorous Academics: The curriculum provides a "content-rich classical liberal arts education" spanning literature, math, history, science, and the arts. We emphasize "intellectual rigor" to ensure students "do the hard work of thinking about and discussing big ideas and important events."

Alignment with the North Carolina Accountability Model

The classical education curriculum also aligns well with the key components of the North Carolina Accountability Model:

- **Academic Achievement:** The rigorous, content-rich curriculum in core subjects like literature, math, history, and science is designed to drive strong academic performance
- **Student Growth:** The curriculum emphasizes developing critical thinking, writing, and problem-solving skills that support long-term student growth
- **School Quality/Student Success:** By focusing on virtue, character development, and civic responsibility, the classical curriculum aims to prepare students for success beyond just test scores

Evidence of Effectiveness of the Classical Education Model

Modern classical education is inspired by the ancient Greek and Roman traditions of art, literature, and language that are the foundation of Western civilization. Classical curriculum might appear similar to a typical district school education: it includes math, science, English and language arts, history, the arts, and foreign languages. However, the coverage of these subjects is distinctive.

English and language arts in a classical school are split into two subjects: reading and writing. These subjects are combined with history instruction, where writing continues. Reading receives particular attention because it is the ultimate source of knowledge in all other subjects. Writing receives great focus because the written word is how ideas are expressed and conveyed in the Western tradition. Following are examples of how the Classical Education movement is growing and successful in driving student outcomes in the U.S.:

Classical charter schools in New York City, Washington DC, Nashville, and Las Vegas have majority-minority or low-income student bodies, and their state test scores match or exceed the averages of their respective public school districts.[1]

- [Nashville Classical](#) posts higher rates of proficiency in ELA (English Language Arts) and math—both as a student body and by race—than district public schools. Compared with other public schools in the area, Nashville Classical more than doubles its students' proficiency rates in math (64.5% vs. 29.9%) and nearly doubles their proficiency rates in ELA (49.2% vs. 25.9%). Black students at Nashville Classical also achieve far higher rates of proficiency in ELA and math compared with their counterparts elsewhere in the school district and the state as a whole. The student body itself is majority-minority: 62% are listed as black, and 8% are listed as Hispanic (the Metropolitan Nashville school district is 27% black and 10% Hispanic). [2]
- [South Bronx Classical](#) stands far above schools in the surrounding South Bronx area. Each school in the network reflects nearly universal proficiency in core subjects such as ELA and math. SBC's results not only greatly surpass neighboring schools' but are positive outliers in New York State. [3]
- [Washington Latin Public Charter School](#) has a 90% four-year graduation rate, compared with DC's 69% graduation rate in traditional public high schools. The student body performance on the District's standardized Partnership for Assessment of



Readiness for College and Careers (PARCC) exams reflects the intensive focus that the school places on the humanities. Students in the middle (grades 5–8) and upper (grades 9–12) schools exceed proficiency rates in the Washington, DC, public school district on ELA assessments for black and white students. While math scores on average at Washington Latin surpass those in the general population, they lag at the high school level.[4]

- Hellenic Classical Charter School in New York City serves a largely low-income student body. It has flourished by emphasizing proven pedagogical approaches like phonics instruction and building students' background knowledge. As a result, 61% of its students passed the state's English Language Arts and Literacy Standards test in 2022, compared to 47% statewide.[5]
- Founders Classical Academy in Las Vegas has consistently outperformed local district schools on state assessments. In 2022, 92% of Founders Classical Academy students met or exceeded grade level in math, compared to just 58% in the local district.[6]
- Classical charter schools in Texas have seen significant growth in recent years, with enrollment increasing about sevenfold from 2011 to 2021. Non-classical charter schools only doubled over the same period. A recent report by the Texas Policy[7] Institute summarized the key points in the 10 year study:

The key points are:

- Research shows that parents' educational priorities are generally aligned with the priorities of classical education, such as the pursuit of truth, goodness, and beauty through a liberal arts education. (We chose our name based on these three focuses of a classical education school).
- Parents highly value the formation of civic virtues and preparation for citizenship that classical education provides.
- Over 90% of parents with children in classical charter schools in Texas said they were "very satisfied" or "somewhat satisfied" with the overall quality, teachers, learning progress, academic standards, character instruction, and climate of their child's school.
- The growth in classical charter schools in Texas is attributed to parents seeking an education that celebrates the good things inherited from the past while also inspiring virtues like courage and moderation.
- Classical education is seen as providing a distinct, time-tested approach to education that prepares students for more than just college or work by developing well-rounded individuals capable of living virtuous and happy lives.
- The curriculum and instructional methods used, such as teacher-led classrooms, explicit phonics, and traditional math, are cited as having "proven" to be effective in educating previous generations.

- [1] Classical Education: An Attractive School Choice for Parents. Brandon McCoy, 2021, Manhattan Institute.
- [2] TNReady – Tennessee Department of Education
- [3] Ibid
- [4] DC Office of State Superintendent of Education. 2018-2019 PARCC Results
- [5] The Joys and Rigors of a Classical Education. DS Egorov, 2023, City Journal
- [6] SITE EVALUATION: Founders Classical Academy of Las Vegas DATE: 9/22/2022
- [7] The 'Quiet Revolution' of Classical Charter Schools is Making Some Noise. ED Valdes. Texas Policy Foundation, 2023.

Applicant Evidence :



Uploaded on **4/1/2024** by **Joe Higgins**

Q131. Describe the primary instructional strategies that the school will expect teachers to master and explain why these strategies will result in increased academic achievement for the targeted student population for each grade span (i.e. elementary, middle, high) the school would ultimately serve.



The Trinitas Academy Professional Development implementation strategy will address and include:

- Continual and collaborative professional learning
- An Academic Oversight Committee that meets quarterly and monitors benchmarks and teacher observation data and take corrective action as needed.
- Frequent Pop In Observations and Bi-Annual Formal Observations
- Individualized coaching and mentoring
- Weekly, school-based professional development workshops
- Virtual Professional Development Library

The PD staff and lead teachers at Trinitas Academy work closely with the site Principal to ensure curriculum delivery and content coverage fidelity. In combination, the training and content modules found in the Schoology Learning Management system help foster strategies to bring passion, student engagement, thematic units, and deeper learning to every lesson.

The PD staff is primarily responsible for programming the PD training schedule on the campus. Feedback from teachers, administrators, and LoTi pop in as well as NWEA Map data, will help tailor a PD schedule on a quarter-by-quarter basis. The Trinitas Academy PD team supports these efforts and includes training and implementation of the Classical Curriculum tools, which include sample lesson plans and resources designed to make the teacher's instructional planning as focused as possible.

The Professional Development Calendar:

1. Summer Prior to Opening of School

Trinitas Academy leadership will host a 15-day orientation and in-service training program for teachers and other staff to kick off the Classical pedagogy program. Teachers will work individually, in teams according to grade level, and with a group of teachers to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards.

The start-up budget reflects the cost of paying teachers for the new teacher orientation.

After year 1, the teacher contracts will include at least 5 summer in-service days. A dual-track for new teachers (after the first year) and returning teachers will be created to address both needs.

Five-Day Orientation – New School and or New Teacher

After the launch year, Trinitas Academy will host a five-day orientation and in-service training program for our teachers and other staff in July each year (costs included in the annual budget). Teachers will work individually and in teams according to grade level, as well as with a group of teachers in order to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards. The orientation will address the following topics:

- About Trinitas Academy
 - Mission, vision, and core values
 - How mission, vision, and core values impact teachers and scholars every day
 - Classical education
 - Classroom environment in a Classical/Charlotte Mason School
- Academics & Teaching
 - North Carolina Academic Standards EOA
 - Academic Excellence in a Classical School
 - Planning and preparation strategies
 - Lesson implementation with outcomes aligned to standards
 - Best teaching practices
 - Curriculum resources, usage, and supplementation
 - Using Schoology LMS
 - Curriculum maps and pacing
 - LoTi Teacher Pop In Observation – What is Expected



- NWEA – MAP Testing System
 - Accessing MAP reports
 - Interpreting and implementing MAP results in the classroom
 - The Trinitas Academy 8 Step plan for data analysis
 - Role of the AAC (Academic Accountability Committee)
- Assessments & Instruction
 - Scholar assessment data
 - Types of assessments – Exit Tickets – Grading Strategy
 - Benchmark Assessment (NWEA-MAP)
 - Instructional decision-making based on data
 - Setting goals concerning student learning and the standards
 - Developing and implementing action plans
 - Establishing objectives related to standards
 - Differentiated instruction
 - Instructional material/resources for differentiated instruction
 - Strategies for Gifted and Talented
 - ELL best practices in the traditional classroom

In addition to the 5-day orientation and in-service, teachers will attend professional development sessions throughout the year focused on North Carolina Standards, differentiation, and Classical Education.

Year-Round Teacher Training and Evaluation

Early Release Days - Weekly, In Service, Early Release PD

Once per week, at the campus, students are dismissed early, and schools hold professional development workshops targeted toward improving school-wide practice. Workshops deliberately build key skills across practical, relevant topics such as culture, instruction, analysis of student work, and curriculum. A sample schedule will be produced for the entire semester, and adjustments will be made to the PD course programming based on specific needs observed in the classrooms.

The beginning years of the school will focus on quality instruction, understanding the curriculum resources, and beginning Classical Education-based training sessions (Socratic seminar, picture studies, integrating the arts into instruction, nature study, copybook, recitations, the Why of Latin, etc.).

In the coming years, the principal will review the school's areas of weakness and tailor the weekly in-service PD courses to address those areas that need attention.

Classical Education – Online Teacher Training Program.

Over 75 Professional Development courses have been developed in the Schoology Learning Management System. These courses range from particular tools and nuances of Classical Education, Charlotte Mason's philosophies, to practical examples of real-world teacher challenges in Classical Education. The PD Course offerings intentionally introduce new staff members to basic aspects of our culture and expectations. Once on board, the PD Course offering trains a teacher on a theory or practical aspect of their profession. The Trinitas Academy PD department will observe an issue or coachable moment, assign the corresponding Virtual PD mini-course to the teacher, and follow up with the teacher to ensure understanding and implementation. A sampling of the courses offered includes:

- Relating with Parents
- Relational Discipline Strategies (Dr. Druikers and Dr. Glasser)
- Narration and Recitation at various grade levels
- Socratic Instruction - Intro, Level 1 and Level 2
- Classroom Management
- Understanding Classical Curriculum Resources



- Data interpretation and grouping
- Differentiation in the classroom

Staff will have an opportunity to progress in their careers at Trinitas Academy by attending in-person Professional Development classes and achieving mastery through various observations, one-on-one coaching, and mentorship.

Master Teacher Program – Beginning in Year 2 -OpportunityCulture.org –

In year two of operations, Trinitas Academy intends to implement the Master Teacher program outlined in **OpportunityCulture.org**. The researched Master Teacher program was underwritten by the Bill and Melinda Gates Foundation and the Walton Family Foundation, among others. The driving mission of Trinitas's Master Teacher Program will be to keep great teachers in the classroom but allow them to mentor other teachers at their grade level or at their school. The Trinitas Master Teachers are paid an additional stipend and have a lighter teaching load. Each grade level has a Master Teacher whose responsibility it is to mentor their team, disseminate information, analyze and correct teaching techniques, and integrate the data-driven instruction protocols identified by the Administration and Professional Development staff.

Trinitas Academy intends to write grants starting in years two and three to expand the OpportunityCulture.org program. The grant's focus would include expanding the role of Master Teacher by utilizing technology that would allow the top Master Teachers in the Trinitas Academy network to mentor and coach all the teachers at a particular grade level. This technology would also allow Master Teachers to lead virtual Socratic discussions all around the Country using a standard Google Hangout connection. The best teachers, mentoring, and instructing at the highest level are the goals of the OpportunityCulture.org system.

Tracking and Monitoring Teacher Performance:

Trinitas Academy will implement the LoTi Teacher Evaluation System (Levels of Teaching Innovation), teacher evaluation, and student engagement system. Through pop-in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allows the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable, allowing the Trinitas Academy admin to identify issues and take corrective actions. A target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

To successfully implement and track a training program, there needs to be a common and measurable results-based analysis. LoTi delivers consistency in teacher training, curriculum implementation, and classroom observations, which becomes critical. These scoring metrics are consistent and measurable, allowing the site Administration to identify issues and invest in additional training, more one-on-one coaching, or corrective actions.

Dr. Chris Moersch designed LoTi as a way to assess the most critical aspect of a scholar's education, a great teacher in the classroom. Dr. Moersch is the author of *Beyond Hardware: Using Existing Technology to Promote Higher Level Thinking*. Dr. Moersch has developed his program using the Danielson Rubric model, which also incorporates a student engagement component known as H.E.A.T. (Higher order thinking, Engaged learning, Authentic connections).

H.E.A.T is used as a lens to go beyond the lesson plan to what is actually happening with students. The activities the teacher plans often do not produce the expected output from students. H.E.A.T. provides a common language to discuss and measure student output in a way that is tied to evidence-based practices.

LoTi involves teacher drop-in observations, real-time and engaging feedback from the PD. These tools and the feedback systems ensure that the teacher, Principal and PD team are speaking a common language of what is expected and what quality instruction looks like at the school. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teacher's skills and ensures a program of instruction is being followed and delivered at a high level.

School Principal - Governing Board Oversight



The governing board's responsibility is hiring, supporting, and, if necessary, the Principal. The Principal is charged with the day to handle school functions. The school's Principal's primary focus is on the academic and cultural effectiveness of the school. By reviewing several performance data points, the governing board can determine if the Superintendent is achieving their leadership objectives. Some of the data points the governing board will be reviewing quarterly include:

- The Governing Board's evaluation of the Principal
- Student benchmark assessments (NWEA-MAP)
- End of year NC State Exams
- Teacher turnover and exit interviews
- Net Promoter Score (NPS) data
- LoTi teacher evaluation pop-in scores
- PTO feedback (reported to the board annually)
- Enrollment targets established by the Governing Board
- Academic growth – including cohorts, ELL, and Special Needs populations
- Community involvement and impact narratives

Applicant Evidence :


Loti - Teacher Evaluation - T...

Uploaded on **4/2/2024** by **Joe Higgins**

Q132. Explain how the proposed instructional plan and graduation requirements will ensure student readiness to transition from grade to grade and to the next grade span upon program completion.



Promotion to the next grade will require an average of 70% or greater in Math, ELA, science, and history. Students who fall below their final grade will have the option of making up the core subject class during the summer or to be retained and repeat the grade. Prior to retention and failure, a detailed and robust system of interventions and oversight will have been implemented. These include:

- Identification of failing or struggling students (AAC team),
- Targeted interventions via a team approach (via the RTI team) that may include referral to the Special Education department, English Language Learning supports, or outlining strategies for the classroom teacher to implement and monitor.
- Determination of community services is required to address at-home issues
- Utilization of after-school tutoring/interventions
- Targeted digital intervention tools (iStation, Schoology, iReady, etc.)

Our school's mission is to provide a **rigorous Classical Education** to all students, and mastery of core subjects is our goal. Suppose a student does not meet the promotion criteria at the end of the school year. In that case, our administrative team may offer interventions and support to help the student catch up and meet the criteria for the promotion. These may include summer school programs, tutoring, or additional instructional time during the school day. If a student with special needs does not meet the promotion criteria, the IEP team may convene to determine appropriate interventions and supports. As needed, summer school options will be available for ELA and Math instruction. Teachers will be offered summer stipends to provide summer options. Should parents wish to seek online options, prior approval from the school Principal will be required to accept the makeup credits.

For general education students, the promotion criteria include meeting grade-level standards in reading, mathematics, science, and social studies, as well as meeting attendance and behavior requirements. Students must also pass state assessments in reading and mathematics in third, fourth, and fifth grades and science in fifth grade.

The promotion criteria for each grade level are communicated to parents and students at the beginning of the school year, which outlines the grade-level standards and expectations for students. Our school will also provide parents with regular progress reports and report cards indicating whether their child meets the promotion criteria.

Suppose a student does not meet the promotion criteria at the end of the school year. In that case, our administrative team may offer interventions and support to help the student catch up and meet the criteria for promotion. These may include summer school programs, tutoring, or additional instructional time during the school day. If a student with special needs does not meet the promotion criteria, the IEP team may convene to determine appropriate interventions and supports.

In the first three years of operation, the school will focus on understanding where each student is on their academic journey and working to help them succeed in the rigorous Classical Education model. Over time, as students spend time in the Trinitas Academy academic program, the curriculum, intervention, and instructional methods have a compounding effect, and our mission will be aligned. Patience and persistence will be our goals as we grow our school.

Attendance:

The Trinitas Academy Governing Board will adopt the North Carolina State Board of Education attendance criteria to ensure that students are regularly attending school and making progress toward their educational goals. Schools are required to monitor student attendance and communicate regularly with parents about their child's attendance status. If a student is struggling with attendance, schools may provide interventions and support to help improve their attendance and prevent retention.

For students in grades K-3, the criteria for promotion require that the student not miss more than six days of school during the academic year, unless the absences are due to a valid excuse such as illness, a family emergency, or a religious observance.

For students in grades 4-8, the criteria for promotion require that the student not miss more than eight days of school during the academic year, unless the absences are due to a valid excuse.

If a student does miss more than specified days of school, they must demonstrate proficiency in reading by passing a reading assessment in order to be promoted to the next grade level.



Read To Achieve

Under the Read to Achieve program, students in kindergarten through third grade are required to take regular assessments to measure their reading proficiency. If a student is not reading at grade level by the end of third grade, the student may be retained in third grade until they can demonstrate proficiency.

In addition to the assessments, our school will provide reading interventions and support to students who are not reading at grade level. Our assessment and intervention plan outline these interventions and may include one-on-one tutoring, small-group instruction, and additional instructional time. Schools are also required to provide parents with progress reports on their child's reading proficiency and any interventions that are being provided.

Parents are also encouraged to participate in their child's reading development by reading with them at home and engaging in other literacy activities. Schools are required to provide parents with information on how they can support their child's reading development.

Promotion criteria may be modified based on students' individualized education plans (IEPs). The IEP team, which includes the student's parents, teachers, and other professionals, determines the promotion criteria for each student based on their unique needs and abilities.

Q133. Describe in a brief narrative how the yearly academic calendar coincides with the tenets of the proposed mission and education plan.

The academic calendar for the Trinitas Classical Academy will align with the requirements of the North Carolina Department of Instruction for K-8 schools. Our proposed calendar will closely align with the calendar of the Iredell-Statesville Schools, to ensure seamless integration and coordination for students, families, and staff.

The key aspects of the Trinitas Academy academic calendar that are relevant to the proposed mission and education plan of rigorous academics are:

School Year Dates: The school year typically begins in mid-August and ends in early June, providing a full academic year of instruction to include 185 days

Instructional Time: The calendar includes 185 instructional days for students, with additional teacher workdays for professional development and planning. This aligns with the goal of providing rigorous academics.

Holidays and Breaks: The calendar includes standard school holidays, such as Labor Day, Thanksgiving, Winter Break, Martin Luther King Jr. Day, and Spring Break. These breaks allow students and staff to recharge and return refreshed for the next academic period.

Testing Windows: The calendar includes specific windows for state-mandated assessments, such as Beginning-of-Grade 3 Testing, PreACT, and End-of-Course Testing. This ensures the school is prepared to administer these assessments as part of the rigorous academic program.

By closely aligning the school's academic calendar with the Iredell-Statesville Schools calendar, Trinitas Academy can seamlessly integrate with the local education system, share resources and professional development opportunities, and ensure a smooth transition for students moving between schools within the district. This alignment will support the school's mission of providing rigorous academics and a well-rounded educational experience for its students.

Q134. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning.



The school day for Trinitas Academy will mirror the Iredell Statesville School District. We will adjust our bell schedule to accommodate traffic flow on campus to include multiple drop-off and pick-up times. Our target schedule will mirror The Brawley School with drop off at 8:25 and pick up at 3:00 PM.

The weekly schedule will include core courses each day as well as two or three specials per week, alternating between two specials one week and three specials the second. Specials include Latin, Art, Music, and Physical Education.

Our school schedule will exceed the minimum of 5 hours and 42 minutes per day of instruction.

Kinder to 3rd Grade ELA. students will receive daily English instruction equal to 135 minutes per day. Our program requires three 45-minute segments. The segments involve

1. A daily interactive read-aloud with time for grammar and writing instruction.
2. A daily shared reading lesson involves students following along with the teacher and doing word studies for difficult words found in the text. This segment involves partner reading as well.
3. Small-group differentiated instruction occurs during the third 45-minute block. During ELA lessons, students are introduced to the objectives, which are aligned with NC State standards and easily found in the Schoology LMS for each unit.

ELA Program 4th to 8th Grades. The ELA program for grades 4 to 8 is aligned with 6 to 8 classical novels.

The ELA block is also 135 minutes and likewise is broken down into three 45-minute segments.

- **Block 1.** This 45-minute block will also include additional time for writing and learning grammar conventions, using the read-aloud text as a guide. The text complexity is increased in read-alouds (up to 6th grade).
- **Block 2.** A daily shared reading lesson involves students following along with the teacher and word study to include selected Latin root words as prescribed. This segment involves partner reading as well.
- **Block 3.** Small-group differentiated instruction occurs during the third 45-minute block. By this stage, our NWEA-MAP benchmark data will drive our ability grouping, and where the teacher will focus on small group differentiation. Read alouds become optional in grade 6, and more student choice is built into the plan.
- **Writing Skills:** Writing occurs in both English and History and Science. The teacher grading distribution must include at least 10-20% of the student's grade (depending on the grade band) in these subjects, including journals, research papers, presentations, and scientific notebooks.

Math Schedule –Math is the second largest block scheduled for mornings, with 90 minutes in K-5 and 60 minutes in 6th to 8th each day of instruction per week. Within the math block, instruction will be purposeful and spiral concepts from prior lessons with new concepts. This spiraling aspect spends the first part of the year (25% to 33% of the year's lessons) on prior knowledge and foundational concepts needed to master the current year's concepts.

The structure in the classroom for math instruction will be a balance of INSTRUCTION, PRACTICE, and ASSESSMENT. Every 10 lessons, an assessment is given to check the class for understanding and to give the teacher feedback on how concepts are being retained.

Science and History Schedule-

The science and history program at Trinitas Academy will include a minimum of 90 minutes per day.

Q135. Describe a typical day for a teacher and a student in the school's first year of operation.



A typical day at Trinitas Academy:

When the students arrive, the teacher greets them by name and ensures they are settled in the classroom. Students are greeted by name as they enter the classroom. The rooms include our featured artist and composer of the month and the day's schedule, homework, and specials for the day on the whiteboard. The room is circled with our Classical Education timeline of important dates, each designed differently using the teacher's and student's creativity.

The day begins with a "Morning Meeting," during which the class reviews the housekeeping of the day/week and discusses the week's values and virtues.

Throughout the day, the teacher provides direct instruction in subjects like writing, literature, and math while facilitating small group work and individualized support per our schedule. Math instruction begins in the lower grades at the math wall. Students have ample opportunities to practice what they learn. While a teacher pulls small groups for math intervention, remediation, or enrichment, other students may practice independently or start math homework.

English block begins with the teacher read aloud and work on grammar, sentence deconstruction and spelling. In grades K-3, every student participates in two small-group literacy lessons based on their reading level. Books are selected for each student/groups instructional level and lessons are designed to improve reading skills quickly. Student's receive direct feedback from their teacher.

We will do our best to schedule core ELA and math classes in the morning.

The student has opportunities for small group instruction, individualized support, and time for independent work and practice.

Breaks, including recess and lunch, are built in for students to have snacks, use the restroom, and get some physical activity.

The teacher works to create a joyful and rigorous learning environment, focusing on building strong relationships with students. This is part of our mission and guiding beliefs. We provide resources, model lesson plans, and a detailed scope and sequence of each subject to elevate the planning demands on the teachers.

At the end of the day, the teacher leads a "Closing Circle" where students reflect on their learning and prepare for the next day. Teachers deliver their students to the pickup line and briefly connect with the parents as their children get picked up.

The teacher's day does not end when the students leave, as there is still work on lesson planning, grading, and professional development. PD will be held weekly, with early release planned for Wednesday.

Students can participate in optional after-school programs that include homework time and play/experimental time aligned to our value and virtue theme of the month. Students may choose a weekly club like Chess or Science Club or audition for a performance group like Theater. We will also participate in middle school athletics (Basketball, Soccer, track, softball, and others).

Q136. Will this proposed school include a high school?

Yes

No

Q142. Attach Appendix B: Curriculum Outline per Grade Span (for each grade span the school would ultimately serve). One sample curriculum outline (in graph form) in the Appendices for one core subject (specific to the school's purpose) for each grade span the school would ultimately serve.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5



Applicant Comments :

Attached is the proposed scope and sequence per grade, listing the novel and the core subject (English), learning targets. In Classical Education, English aligns with history as thematic units, and history is included as well. Values and virtues are aligned by month and integrated into English and history instruction.

Applicant Evidence :


Trinitas Curriculum Snapsh...

Uploaded on **4/2/2024** by **Joe Higgins**

Q143. Attach Appendix D: Yearly Academic Calendar (minimum of 185 instructional days or 1,025 hours)

Upload Required File Type: pdf, image, word Max File Size: 30 Total Files Count: 3

Applicant Evidence :


Trinitas Calendar Proposed....

Uploaded on **4/2/2024** by **Joe Higgins**

Q144. Attach Appendix E: Daily and Weekly Schedule Provide a sample daily and weekly schedule for each grade band (K-5, 6-8, and 9-12) the school ultimately plans to serve.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 15

Applicant Evidence :


Trinitas Weekly Schedule Pr...

Uploaded on **4/2/2024** by **Joe Higgins**

10.2. Special Populations and "At-Risk" Students

Q145. Explain how the school will identify and meet the learning needs of students who are performing below grade level and monitor their progress. Specify the programs, strategies, and supports you will provide for these students.



Assessment and Data Tracking Plan: Trinitas Academy will contract with NWEA-Map assessments beginning in 2nd grade. Using internal assessment data from NWEA-Map, the Trinitas AAC team can quickly isolate low scores and determine if the issue is curriculum-based or isolated to a particular instructor. With a curriculum that is paced correctly and calls out the various standards to be focused on during the particular unit, we can ensure that we have a common foundation from school to school. The data-driven instruction becomes an identification tool to help with our differentiated instruction inside the classroom or as an intervention tool.

The following assessment data will be analyzed on a per-student basis;

- DIBELS- Dynamic Indicators of Basic Early Literacy Skills
- Teacher developed pre-assessment and post-assessment
- Teacher developed rubrics for writing and oral skill mastery
- Math Fact Fluency Assessment goals by grade
- RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP)
- Saxon Math Progress Monitoring Assessments
- Student Report Cards and progress monitoring
- Historic review of North Carolina state assessment results by grade band
- NWEA-MAP quarterly student assessments

Each teacher will follow a prescribed, 8-point plan for analyzing their student's (NWEA-MAP) benchmark data. This process includes the teacher's strategy to address learning gaps, address special populations, and establish S.M.A.R.T. goals to achieve prior to the next NWEA Benchmark test. The Principal and ACC team will review the teacher-generated plans for completeness. For all students, testing data will be analyzed and broken down by strands; a series of intervention programs will be employed to achieve maximum student growth;

- Study Hall or one one-on-one tutoring with the teaching staff (to occur during mandatory weekly 2-hour teacher study hall)
- Purposeful Pause in content delivery if entire portions of a class need assistance
- Dedicating class time to differentiate in 'Crash Course' by strand instruction
- Advanced student strategy to challenge students who can advance beyond their grade level.
- Differentiated Instruction – and the training needed for all teachers to implement differentiation techniques in their classroom successfully.
- Progress monitoring with additional testing on standards that need additional support
- Third-party cloud-based subscription services such as iReady – Study Island
- Parent Volunteers and or tutor clubs
- Referral to RTI/MTSS and intervention

For Referrals to RTI: The RTI team will review the academic performance of individual students who need support above and beyond classroom interventions. The RTI team will implement a learning plan to ensure the success of all students. The analysis will include:

- High-quality, differentiated core instruction in an environment responsive to social, emotional, academic, and behavioral goals. (monitored by the PD and Admin team)
- Data-informed decision making. Review of goals, prior data, improvement, and trends.
- Progress monitoring using benchmark testing.
- Layered handoffs for a continuum of academic, social, emotional, and behavioral supports.
- Family, School, and community partnerships are available.
- Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school.

Tier 1 and 2 – Classroom Differentiation - Once student's skills needs have been identified, teachers will implement a differentiation strategy that best fits their unique class dynamics. The methods teachers are trained on by our Professional Development team and the process administration is tracking include Lessons that are differentiated by a choice of content, process, or outcome goal. The grouping will be done based on student interest, skill readiness, or learning profile. The tactics employed by the teacher in the classroom will include flexible grouping, student choice, and learning centers. Ongoing monitoring and adjusting are crucial to a successful differentiation program.



Students in the 20-30% of grade level proficiency will be enrolled in the Trinitas Academy intervention program and move to Tier 3 – Pull out intervention.

Tier 3 - Pull Out Intervention; Certain students will be identified as needing beyond classroom support and will be enrolled in the Trinitas Academy Intervention Program. Tier 1 and 2 interventions primarily occur with the classroom teacher. Tier 3 interventions for struggling early readers involve identification, constant monitoring, and small group pull-out instruction. In the intervention department, that team has a number of digital options, including the iReady English program and workbook, as well as the iReady assessment tool to monitor progress. Wilson Foundations (wilsonlanguage.com) has been identified as an intensive intervention system and will be available on an as-needed basis, as well as the open source resources found at Bookwork.com.

Suppose academic achievement expectations or goals are not met. In that case, the leadership team will also analyze data and operations to determine if there are deficiencies in instruction, including curriculum and/or teacher instructional techniques. The corrective action steps would include the following:

- Additional observations of teachers to identify poor instruction, classroom management, or root cause issues that may affect student outcomes.
- Referral to the school leadership team to analyze curriculum and resources to ensure proper state standards alignment.
- Revamp the Enrichment and Remediation (E/R) instruction in middle school to better meet the needs of students not meeting academic expectations.
- Address teacher training and professional development offerings to address shortcomings in academic expectations or goals specifically.
- Analyze and adjust student ability grouping via differentiation in lower grades and class enrollment in middle school, where necessary. This would happen for both reading groups and the math block. The Principal would be responsible for implementing corrective action if expectations or goals are not being met. The Principal will enlist the assistance of the lead teachers, the ACC team and the schools governing board in order to take immediate corrective action.

Teacher Based Benchmark and Final Exams: Teacher-created content-specific Benchmark and Final Exams are required in every Trinitas Academy course. These assessments provide teachers with essential data regarding the effectiveness of their teaching and the curriculum. Teacher-generated quarterly and mid-term exams provide teachers and students with the opportunity to measure the amount of learning at the mid-point in the semester. Final Exams provide teachers and students with the opportunity to summarily measure the total amount of learning over the entire semester. Triangulated with teacher-generated exams are the quarterly NWEA-MAP assessments, which benchmark each grade level to national cohorts.

Instructional staff will be trained and monitored on their formative and summative assessments occurring in their classroom. Some of the techniques teachers will be expected to implement include:

Formative:

Check for Understanding

- Throughout the lessons, the Teacher will regularly check for understanding using a variety of methods.
 1. Class response system – thumbs up, thumbs down
 2. Q&A
 3. Exit Tickets
 4. Classroom quizzes.

Define Success – Socratic feedback and tracking -The teacher provides students with an open-ended question related to a concept they are studying and asks the students to identify the information or details necessary for a response to demonstrate a full understanding of the concept. A list of these details is recorded on the board.

Quiz with Student Cross Grading – Each unit of instruction, typically 4 weeks, will involve one or two quizzes prior to the End of Chapter Test. Fellow students will grade quizzes, and time will be devoted to pairs and sharing between students to solve quiz answers that are not correct.

Summative



End-of-Chapter Testing—Students will be given an end-of-chapter test with instructions to show their work. The grading rubric will include 75% of the overall grade for the correct answers and an additional 25% for correctly showing how the student arrived at the answer.

Summative Assessment Analysis and Adjustment—following summative assessment results, the teacher will determine if the entire class should be reinstructed on the particular topic or if a differentiation program should be implemented to ensure mastery of the subject.

Homework Help Program

Students are asked to place the homework they are struggling with on the board. Other students then begin working through the steps of solving the equation, with the student struggling with the work functioning as a teacher—fielding and directing the discussion.

Q146. Describe the extent to which one or more of the founding board members has experience working with special populations (students with disabilities, students with 504 Plans, MLs, students identified as gifted, and students at risk of dropping out). If no founding board members have experience working with special populations, describe the school's pre-opening plan to prepare for special populations.

Dr. Boen Nutting will serve as principal of Trinitas. Her doctoral dissertation explored the Individualized Education Plan (IEP) process within the piedmont region of North Carolina. Additionally, Dr. Nutting served as Chief of Student Services for the Iredell-Statesville Schools, where she oversaw the facilitation of special populations including but not limited to 504s, Behavior Management, school nursing, school psychologists and Title IX.

During her 14 years as a building level administrator, she was part of an IEP/504 team for hundreds of students. Pre-opening plans will include a systematic process for identification of special populations as well as needed professional development for both faculty and staff. Special consideration will be taken in preparation of the school matrix as it relates to class offerings for students with special needs.

Q147. Explain how the instructional plan and curriculum will meet the needs of Multilingual Learners (ML), including the following:

1. Methods for identifying ML students (and avoiding misidentification).
2. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the core academic program for ML students.
3. Plans for monitoring and evaluating the progress and success of ML students, including exiting students from ML services.
4. Means for providing qualified staffing for ML students.



The protocol and instruction plan for Multilingual Learners (ML) will be as follows:

- All students enrolling at Trinitas Academy must complete a Home Language Survey (HLS), which asks about the primary language used at home. The student is considered a potential ML and must be assessed for English proficiency if any language other than English is indicated.
- Within 30 days of enrollment, potential ML students will take the WIDA Screener assessment, testing their proficiency in Listening, Speaking, Reading, and Writing. The EC staff will administer this test in conjunction with the classroom teacher. Kindergarten students in the first semester take only Listening and Speaking, while second-semester Kindergarteners and first graders take all four sections.
- Based on the WIDA Screener results, students are identified as ML if they score below the NC-determined proficiency level. ML students are then eligible for language assistance services to help them learn English and access academic content. The Trinitas budget reflects our best estimate for staffing to serve the ML students. This includes 1 ML teacher in years 1 and 2 and 2 ML teachers in years 3 to 5.
- The HLS is only completed once upon a student's initial enrollment in North Carolina schools. If students transfer within the state, their ML identification from the previous district still applies. Our admin team will ensure proper documentation for newly enrolled and transfer students.
- Only qualified school personnel who have received training in the state testing program are permitted to administer the WIDA Screener. Test administrators must have an educational background and a North Carolina teaching license. Our budget reflects this position.

Classroom Strategies for Trinitas Multilingual Instruction

Aligning with our mission and philosophy, our ML staff will first cultivate relationships and be culturally responsive by creating a supportive environment where students feel known, appreciated, and comfortable taking risks.

Differentiate instruction and use multiple modalities (writing, speaking, drawing, listening) to engage students and provide opportunities to deepen their understanding. This can be done in the classroom with the teacher's support and the ML-trained teacher.

Incorporate students' native languages as a foundation for learning English through strategies like "preview, view, review". Latin instruction in grades 3 to 8 is an ideal way to bridge root work analysis for the romance language ML students.

Provide explicit instruction in reading comprehension strategies, vocabulary, and scaffolded performance-based tasks. Digital resources such as iReady are available as needed.

Establish a read-aloud routine and provide appropriate cognitive-level instruction and materials. Read-aloud is integral to our English program and a hallmark of the Charlotte Mason learning style. English blocks include read-aloud time daily.

Measuring Proficiency

Our EC leader and the ML teacher will annually assess students' English language proficiency using the WIDA Screener. This is in addition to our school-wide NWEA-Map assessment data.

By analyzing student progress in relation to their peers who are making typical progress over time, we can monitor progress.

Exiting Multilingual Services

Students may exit multilingual services when they demonstrate proficiency in English, as determined by the local education agency or district policy.



Applicant Comments :

Attached is the protocol for the overall EC population, including 504 and IEP.

Q145 addresses students not performing at grade level (identification and assessment plan for struggling students), and there are no specific questions on general Exceptional Children protocols. We have attached our plan for EC students to address a potential missing question.

Q146 addresses experienced staff.

Q147 addresses ML protocol.

Q148 addresses Gifted and Talented.

Applicant Evidence :



Uploaded on **4/25/2024** by **Joe Higgins**

Q148. Explain how the school will identify and meet the needs of gifted students, including the following:

1. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities.
2. Plans for monitoring and evaluating the progress and success of gifted students; and means for providing qualified staffing for gifted students.



Gifted and talented students and those with high abilities in the state of North Carolina will be provided with gifted education programs aimed at challenging them within regular classroom settings. Trinitas Academy will provide enrichment and accelerated programs to ensure these students can continuously progress at or above grade level.

The Trinitas Academy Governing Board will develop policies for identifying and monitoring the gifted/talented population. These policies will encompass various key aspects:

- Identification: Continuous screening and selection of students displaying exceptional potential for high levels of achievement. Assessment measures gathered from diverse sources, aligned with the areas outlined in North Carolina plan for the education of gifted/talented Students, including NWEA-MAP benchmark assessments chosen by schools. Gifted/Talented student identification will be determined by testing that shows the students test in the 95th percentile and above on norm-referenced standardized tests. The site Principal will choose these testing options in identification of Gifted/Talented students; Naglieri Test of Nonverbal Ability (NNAT), Cognitive Abilities Test (CogAT), Otis-Lennon School Ability Test, IOWA Test of Basic Skills (ITBS), NWEA-MAP. Additional data: anecdotal records, interviews, observations, characteristics, and checklists will be considered in identification. The teacher will refer students to the RTI/MTSS team when the student is identified as needing an advanced academic challenge. In the 6th to 8th grades students that are above grade level in math can enroll in a grade a head math classes. Trinitas Academy will offer Algebra 1 (a typical 9th grade course) to all students that qualify. Addition advanced math classes will be made available using teacher guided online tools.
- The final selection of students will be conducted by a committee following the RTI/MTSS guidelines.
- Inclusion of guidelines concerning furloughs from the gifted and talented program, reassessment, student exits from gifted and talented program, student transfers into our school, and the school Principal will administer appeals related to decisions on program placement.

Strategies for Gifted and Talented Students:

Educational acceleration will be the cornerstone of the Trinitas Academy gifted education practices, with more research supporting this intervention than any other in the literature on gifted individuals. The practice of educational acceleration has long been used to match high-level students' general abilities and specific talents with matching learning opportunities. Strategies for K5 and 6th to 8th will consider class scheduling and in-classroom opportunities to address gifted and talented students.

Trinitas Academy teachers will employ instructional strategy condenses, modifies, or streamlines the regular curriculum to reduce repetition of previously mastered material. "Compacting" what students already know allows time for acceleration or enrichment beyond the basic curriculum for students who would otherwise be simply practicing what they already know. The curriculum mapping scope and sequencing allow deeper insights into topics and standards. With the Schoology LMS, the teachers have the ability to reach forward multiple grades to create challenging lessons for students who are ready for greater challenges. Options must include:

- Instruction that enables identified students to work together as a group, to work with other students, and to work independently;
- a continuum of learning experiences that leads to the development of advanced-level curriculum and assignments that challenge identified students;
- in-school and, when possible, out-of-school options relevant to the student's area(s) of strength that are available during the entire school year and
- opportunities to accelerate in areas of strength. The practice of grouping will be implemented where appropriate.

The curriculum and mission of Trinitas Academy are rigorous academic expectations. All students will receive rich content and above-grade-level opportunities to read and dissect literature. Our academic model includes for all students, differentiation methods to be trained, monitored and tracked, and academic model that focuses on acceleration, depth and complexity, higher order thinking skills and content extensions. A standard in all our classrooms is teachers that employ large groups, small group instruction, and targeted interventions for low and high achieving students.

Trinitas Academy will implement academic interventions such as accelerating a student in a single subject, compacting curriculum, concurrent enrollment, advanced placement or customized advanced courses in the Schoology LMS Curriculum module, allow teachers to customize academic programs, independent academic studies, grade acceleration.



The framework for a Gifted and Talent program will be based on the Education Strategies for the Gifted and Talented as explained in the North Carolina legislative rules for academically or intellectually gifted students are detailed in Article 9B of the NC Policies Governing Services for Children with Disabilities. Under N.C.G.S. § 115C-150.5-.8, this legislation provides a state definition for academically or intellectually gifted (AIG).

10.3. 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 education teachers pursuant to law.** *Public schools are required to provide a full continuum of services to meet the unique needs of ALL students with disabilities.*

Q149. Identification and Records 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.



Individual Education Plan (IEP) – Free and Appropriate (FAPE) and Least Restrictive Environment

The protocol for placing students with IEPs will be the following:

The placement decision for each child will be as follows:

- Made by a group that includes Trinitas Academy school staff, including the Special Education team and allied third-party professionals (Speech Path, School Psych, Occ Med, etc.) The parents and other persons knowledgeable about the child, about the meaning of the evaluation data, and about the placement options
 1. b) In conformity with the Least Restrictive Environment provisions of the IDEA regulations.
 2. c) Determined at least annually.
 3. d) Based on the child's IEP.
- Unless the IEP of a child requires some other arrangement, the child will be educated in the Trinitas Classical Academy classroom environment.
- In selecting the Least Restrictive Environment, consideration will be given to any potentially harmful effect on the child or on the quality of services that she or he needs.
- A child with a disability will not be removed from age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

The leadership of Trinitas Academy has built a special populations program that considers best practices outlined in the NC Policies Governing Services for Children with Disabilities. goals and frameworks, and Federal rules and laws, including Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972, which prohibit discrimination based on race, color, sex, and national origin. Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990 prohibit discrimination based on disability. Title VI of the Civil Rights Act of 1964, the Equal Educational Opportunities Act of 1974 (EEOA), and the Individuals with Disabilities Education Act (IDEA).

Our school anticipates that 8-9% of our student population will qualify for IEP services. Students with special needs will receive the services outlined in their Individual Education Plan (IEP). Our teachers will work closely with administration, Special Education teachers, contracted service providers, parents, and any IEP team member(s) to ensure that the implementation of an IEP is effective and meets the requirements stated in the document. Specific training through experts in the field of Special Education will be made available to the faculty and staff of Trinitas Academy to meet the needs of special needs students and all state and federal laws regarding special education. IEPs will be reviewed and categorized annually by special education staff, and educational evaluations will be performed by a school psychologist or other related service providers as needed.

In Year 1, we have budgeted to hire a Special Education Specialist and an SPED Assistant as needed. The Superintendent will locate and contract outside SPED specialists as needed, including Speech Therapists, Occupational Medicine Therapists, and Psychologists. Trinitas Academy will hire a certified special education teacher and one paraprofessional to manage the special education needs of the projected enrollment.

Q150. 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. Include how the school will avoid misidentification of special education students.



Identification and Screening of Students

As required by school policy and Federal law, Trinitas Academy must ensure that a free appropriate public education (FAPE) is available to all children with disabilities, even those attending private schools and home schools, regardless of the severity of the disability and those who need Special Education and/or related services, are identified, located and evaluated.

1. Trinitas Academy will establish, implement, and disseminate to its school-based personnel and all parents written procedures for the identification and referral of all children with disabilities aged Kinder through 8th
2. Trinitas Academy will require all school-based staff to review the written procedures related to child identification and referral annually. It will maintain staff review documentation.
3. Identification (screening for possible disabilities) shall be completed within 45 calendar days after:
 - a) Entry of each kindergarten student and any student enrolling without appropriate records of screening, evaluation, and progress in school or
 - b) Parent notification of concern regarding developmental or educational progress by their child grades kinder through 8th

Assessments utilized to determine eligibility (not limited to this list)

- Wechsler Intelligence Scale for Children – Fourth Edition
- Wechsler Nonverbal Scale of Ability
- Woodcock-Johnson – Normative Update Complete
- Test of Written Language – Fourth Edition
- Vineland Adaptive Behavior Scales – Second Edition
- Diagnostic Adaptive Behavior Scale
- Speech and Language evaluative tools
- Clinical Evaluation of Language Fundamentals – Fifth Edition
- CAAP-2
- MindPrint Learning

Progress monitoring of special education populations will occur in the same manner and fashion as all Trinitas Academy students. Benchmark assessment data (DIBLES for early reading, NWEA-MAP for standards mastery) will be compiled quarterly. The Special Education and or English Language Learning staff will follow the 8-step data analysis process, which all teachers in the school follow. The final report on student progress, goal-setting plan, and strategy to improve academic outcomes will be presented to the Academic Accountably Committee for review and monitoring.

Q151. Provide a plan detailing how the records of students with disabilities and 504 Accommodation plans will be properly managed, including the following:

- 1. Requesting Records from previous schools**
- 2. Record Confidentiality (on-site)**
- 3. Record Compliance (on-site)**



Trinitas Academy will contract with e-IEP Pro for the management of all students with Individualized Educational Plans (IEEA) and 504 plans. The key benefits of e-IEP Pro (<http://www.e-ieppro.com>) include:

- All student data is managed in a central location. Easy access from any computer or mobile device.
- Allows all stakeholders quick and easy access to student IEPs, 504s, and more.
- Notification of due dates, such as meetings, IEP and MET review due dates, and 504 plans.
- Provides for documenting assessment data and eligibility data for each special education student.
- Easy paperless transfer of electronic student records
- The document locking feature allows IEP teams to lock down documents to protect data integrity.
- Integrated training videos and software support section available to all users 24/7.
- Notify parents as to progress and any potential changes to the intervention plan.

Records request from prior schools will be tracked in our e-IEP Pro system to include - requested, awaiting a response, records received, records reviewed, and added to the student's account.

Screening procedures and data storage processes shall include vision and hearing status and consideration of the following areas:

1. Cognitive or academic.
2. Social or behavioral, and
3. Adaptive development (504 plan eligibility).
4. Our team shall review enrollment data and educational performance in the prior school for a student transferring into our school. Suppose a student not currently eligible for special education has a history of special education or poor progress. In that case, the student's name shall be submitted to the administrator to consider the need for a referral for a full and individual evaluation or other services.
5. Suppose a concern about a student is identified through screening procedures or review of records. In that case, the student's parents shall be notified of the concern within 10 school days and informed of the public agency's procedures to follow up on the student's needs. Parents will be notified and invited to participate in the RTI/MTSS meeting along with special education staff, school psychologists, and/or related service providers to discuss the student's progress in school and create a plan to support their students' learning best. Families will be notified by U.S. Mail, and a face-to-face meeting will be held with the Trinitas Academy Principal at the start of an SPED intervention or during a change of intervention protocol. The notice will be provided in the parent's native language as necessary, and the assistance provided will be described, including intervention strategies and the RTI/MTSS strategies employed thus far. The notification and plan will include a timeline with progress monitoring.
6. Trinitas Academy will maintain documentation (within the chosen platform, e-IEP Pro) of the identification procedures utilized, the dates of entry into school or notification by parents of concern, and the screening dates. The dates shall be maintained in students' permanent records.

Q152. Exceptional Children's Programming Explain how you will meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible.



Least Restrictive Environment – Inclusive Focus

The Trinitas Academy Special Education/ELL team will meet regarding students identified and classified as needing either IEP or 504 accommodations. These meetings will occur every two weeks to review the progress of at-risk students who are underperforming in class and on assessments using a modified Response to Intervention (RTI) model to support students with the interventions needed for achievement.

At the study team's direction, the teacher and the Special Education team have tools for students with IEP's include dedicated student hours with the classroom teacher, differentiated instruction and parent partnering. The study team will meet and evaluate student data to determine progress and next steps. The next steps are to increase student hours and/or target instruction through the reading interventionist or complete an evaluation for the purposes of consideration of qualifying special education service at Trinitas Academy.

The Trinitas special education team will service the student with the IEP-directed number of additional minutes of instruction. A pull-out of the classroom model may be the best option for IEP students. Once in the special education department, there are some curriculum and digital curriculum options for student instruction.

Children with disabilities, including children in public or private institutions or other care facilities, will be educated to the maximum extent appropriate with children who are not disabled in accordance with §§300.114–300.117 of the IDEA regulations. Depending on the scope of the IEP requirements, Trinitas Academy will make every effort to service children with disabilities in the classroom with their peers. A continuum of alternative placements will be made available to meet the needs of children with disabilities for special education and related services.

Content and Delivery Modifications

Teachers will utilize a variety of tools to provide special education for students within the classroom environment. Every effort will be made to support teachers in finding solutions with the tools and support they need to individualize learning for students with special needs effectively:

- Utilize flexible classroom models. Our Ethos Logos and Schoology LMS delivery plan allows for seamless tracking, modification, and customization between the classroom teachers and special education departments.
- Address IEPs with personalized learning plans.
- Engage all learning styles with a variety of instructional modalities.
- Differentiate instruction with meaningful assessment.
- Measure gains with real-time reporting.

Q153. Describe the specific educational programs, strategies, and additional supports the school will provide to ensure a full continuum of services for students with disabilities. How will the school ensure students' access to the general education curriculum?



The Trinitas Academy team will meet monthly to review the progress of at-risk students who are underperforming in class and on assessments using a Response to Intervention (RTI) model to support students with the interventions needed for achievement.

At the teacher study team's direction, the teachers and the Special Education team have tools for students with IEPs, including dedicated student hours with the classroom teacher, differentiated instruction, and parent partnering. The study team will meet and evaluate student data to determine progress and the next steps. The next steps are to increase scholar hours and/or targeted instruction through the reading interventionist or complete an evaluation to consider qualifying for special education service at Trinitas Academy.

The Trinitas special education team will service the students with the IEP-directed number of additional minutes of instruction. A pull-out of the classroom model may be the best option for IEP scholars only during noncore instruction class times (Math or ELA classroom instruction). Once in the special education department, there are several curriculum and digital curriculum options for student instruction.

Progress Monitoring of Special Education Population

Students already enrolled in the Trinitas Academy special education programs will be monitored with quarterly progress reports, which will be documented and shared with the classroom teacher, administration, and the parents/guardians of the student. Annual reviews of the IEP will occur, and determinations will be made if reevaluations and adjustments are required.

Q154. Describe the methods and support systems that will be in place to ensure students with disabilities receive a Free and Appropriate Public Education (FAPE).

To address FAPE (Free Appropriate Public Education) for special education students, the Trinitas Academy academic, administration, and special education team will provide any of the following services as determined by the student's individual IEP or 504 plan.

- **Individualized Services & Supports:** Special education services should be tailored to meet the unique needs of each student, including transportation, psychological services, speech therapy, and more
- **Language Needs and Communication:** Address language needs, especially for students with limited English proficiency or those who are deaf or hard of hearing, ensuring opportunities for direct communication with peers and teachers
- **Assistive Technology:** Determine if students require assistive technology devices and services to support their learning
- **Behavioral Intervention Plans:** Develop BIPs that address the function of a student's behavior through functional behavioral assessments and evidence-based practices
- **Proactive Approaches:** Utilize positive, proactive strategies to support children with disabilities, focusing on reducing exclusionary discipline practices.

By adhering to these modifications and services, Trinitas Academy can effectively support special education students in receiving the necessary services to benefit from their education.

Q155. Describe how implementation of the Individualized Education Plan (IEP) will be monitored and reported to the student, parents, and relevant staff.



The Trinitas Academy team will meet monthly to review the progress of at-risk students who are underperforming in class and on assessments using a Response to Intervention (RTI) model to support students with the interventions needed for achievement. These RTI meetings will include our IEP and 504 students.

At the teacher study team's direction, the teachers and the Special Education team have tools for students with IEPs, including dedicated student hours with the classroom teacher, differentiated instruction, and parent partnering. The study team will meet on a regular basis (monthly) and evaluate student data to determine progress and the next steps. The next steps are to increase scholar hours and/or targeted instruction through the reading interventionist or complete an evaluation to consider qualifying for special education service at Trinitas Academy.

To notify and report IEP and special education progress to families in our school, the following steps will be followed:

- **Schedule an IEP Meeting:** The special education staff will contact all participants, including parents, and ensure parents are notified early enough to attend the meeting. The meeting will be scheduled at a convenient time and place for both parents and the school. **Provide Clear Communication:** Trinitas Academy will give prior written notice before making changes to the IEP, explaining the proposed changes and the reasons behind the changes to maintain transparency.
 - **Provide Services:** After the IEP is written, ensure that the school delivers services as outlined in the plan. Parents will receive a copy of the IEP, and teachers and service providers must know their responsibilities. The Trinitas special education team will service the students with the IEP-directed number of additional minutes of instruction. A pull-out of the classroom model may be the best option for IEP scholars only during noncore instruction class times (Math or ELA classroom instruction). Once in the special education department, there are many curriculum and digital curriculum options for student instruction.
 - **Ensure Timely Progress Reports:** Schools will provide progress reports on time, informing parents about their child's development and any recommended changes to the IEP.
 - **Measure and Report Progress:** Regularly measure the student's progress toward the goals set in the IEP. Parents will be informed of their child's progress at least as often as they are informed of nondisabled children's progress.
 - **Review and Revise IEP:** The team will review the child's IEP at least annually or more frequently if requested. If necessary, the IEP will be revised based on the student's progress and needs. Parents should be invited to participate in these meetings.
- Reevaluation:** Every three years, our team will reevaluate whether the child qualifies for special education services as defined by IDEA.

Comply with Laws: Our school will adhere to the State of North Carolina and federal laws related to special education, ensuring that all requirements are met to avoid compliance issues that could impact reporting accuracy.

Q156. Describe the proposed plan for providing related services and to have qualified staffing adequate for the anticipated special needs population.



Special Population Staffing:

As reflected in this application's budget and employee section, staff increases proportionally to the increases in enrolment.

To staff our K-8 school for special education needs with a population of 9% of our total enrollment, we are budgeting services for speech pathology, psychology, and occupational therapy. The following are the estimated staffing requirements:

Certified Staffing:

For English as a New Language (ENL) programs, staffing includes certified ESOL teachers for stand-alone ENL and dually certified teachers for integrated ENL. This position will be filled based on our enrolled student population.

Special Education Departments typically involve staff members like Special Education Resource Teachers, Department Chairs, and Coordinators. These positions will flex with our enrolled demographic and identification of IEP, 504, and Els.

- Special Education Teacher: Hiring a Special Education Teacher is crucial to overseeing the individualized education plans (IEPs) of students with special needs.
- Support Staff: Consider hiring speech pathologists, psychologists, and occupational therapists to provide specialized services to students with diverse needs.
- Contractors: Utilize contractors for specialized services like speech therapy or occupational therapy to supplement the school's staff.
- Compliance and Regulations: Ensure compliance with state regulations regarding staffing requirements for special education programs to meet students' needs effectively. Our Special Education staff will manage compliance.

By blending certified staff with contractors for specialized services, a K-8 school can effectively cater to the diverse needs of our projected students requiring special education services in areas like speech pathology, psychology, and occupational therapy.

Teaching Staff	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
Core Classroom Teachers (inc lang, art, specials)		24	28	34	38	40
Special Education		2	2	3	4	4
Intervention		1	1	2	2	2
ELL Specialist		1	1	2	2	2
Teaching Aides or Assistants		4	4	6	6	6

10.4. Student Performance Standards

Q157. Describe the student performance standards for the school as a whole.



The academic goals for the school as a whole will look to attain the following North Carolina end-of-year assessment goals as follows:

- Year – 1 Math 59 Reading 55
- Year – 2 Math 60 Reading 56
- Year – 3 Math 61 Reading 57
- Year – 4 Math 63 Reading 58
- Year – 5 Math 64 Reading 60

Testing grades include 3rd to 8th grade on the NC End of Grade assessment. See assessment strategies in Q158.

The strategy to achieve these results includes the implementation and fidelity of our school's Academic Accountability Committee (AAC) efforts. These include using benchmark data (NWEA-MAP) and teacher assessment strategies to identify learning deficiencies as a predictor of EOG NC standards and implementing a strategy of differentiation, one-on-one instruction, or tutoring.

Strategies To Ensure Academic Goals:

- Teacher grade-level Professional Learning Committees (PLCs) collaborate to create effective instructional strategies, assessments, and ongoing reviews of student outcomes
- Teach curriculum with passion, creativity, and real-life examples (as monitored by administration). Supported, trained, and monitored by Ethos Logos Publishing.
- Protect instructional time with school schedules, events, etc
- Implement student interventions for struggling students: reteaching, remediation, tutoring, differentiation, and other strategies.
- Create a summer program that encourages students' ongoing learning and reduces learning loss.
- Homework - Trinitas students will demonstrate responsibility for their learning by achieving the following homework completion rates:

1. Year 1 – 70%
2. Year 2 – 75%
3. Year 3 – 80%
4. Year 4 - 82%
5. Year 5 - 84%

Measured by PowerSchool in the "homework" category. Strategies: Homework will be appropriate per grade level, meaningful, relevant, and designed as a review or practice. Students will have resources to complete homework. Support will be available for students who struggle. Teachers will check homework folders for all students daily. Teachers will place a high value on homework completion.

The student performance standards will be reported to the Trinitas Governing Board Academic Committee quarterly.

Q158. 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.



Assessment and Data Tracking Plan: Trinitas Academy will contract with NWEA-Map assessments beginning in 2nd grade. Using internal assessment data from NWEA-Map, the Trinitas Academic Accountability Team (AAC) team can quickly isolate low scores and determine if the issue is curriculum-based or isolated to a particular instructor. With a curriculum that is paced correctly and calls out the various standards to be focused on during the particular unit, we can ensure that we have a common foundation from school to school. The data-driven instruction becomes an identification tool to help with our differentiated instruction inside the classroom or as an intervention tool.

The following assessment data will be analyzed on a per-student basis;

- DIBELS- Dynamic Indicators of Basic Early Literacy Skills (K2 or 3rd)
- Teacher developed pre-assessment and post-assessment
- Teacher developed rubrics for writing and oral skill mastery
- Math Fact Fluency Assessment goals by grade (Found in NWEA-MAP)
- RIT Word Fluency Assessment goals by grade (as gaps are identified in NWEA-MAP)
- Math Progress Monitoring Assessments
- Student Report Cards and progress monitoring
- Historic review of North Carolina state assessment results by grade band
- NWEA-MAP quarterly student assessments beginning in 2nd grade

Each teacher will follow a prescribed, 8-point plan for analyzing their student's (NWEA-MAP) benchmark data. This process includes the teacher's strategy to address learning gaps, address special populations, and establish S.M.A.R.T. goals to achieve prior to the next NWEA Benchmark test. The Principal and AAC team will review the teacher-generated plans for completeness. For all students, testing data will be analyzed and broken down by strands; a series of intervention programs will be employed to achieve maximum student growth;

- Study Hall or one one-on-one tutoring with the teaching staff (to occur during mandatory weekly 2-hour teacher study hall)
- Purposeful Pause in content delivery if entire portions of a class need assistance
- Dedicating class time to differentiate in 'Crash Course' by strand instruction
- Advanced student strategy to challenge students who can advance beyond their grade level.
- Differentiated Instruction – and the training needed for all teachers to implement differentiation techniques in their classroom successfully.
- Progress monitoring with additional testing on standards that need additional support
- Third-party cloud-based subscription services such as iReady – Study Island
- Parent Volunteers and or tutor clubs
- Referral to RTI/MTSS and intervention

For Referrals to RTI/MTSS: The RTI team will review the academic performance of individual students who need support above and beyond classroom interventions. The RTI team will implement a learning plan to ensure the success of all students. The analysis will include:

- High-quality, differentiated core instruction in an environment responsive to social, emotional, academic, and behavioral goals. (monitored by the PD and Admin team)
- Data-informed decision making. Review of goals, prior data, improvement, and trends.
- Progress monitoring using benchmark testing.
- Family, School, and community partnerships are available.
- Professional Development offerings and tailoring to meet the particular needs of a teacher or the entire school.

Tier 1 and 2 – Classroom Differentiation - Once students' skills need have been identified; teachers will implement a differentiation strategy that best fits their unique class dynamics. The methods teachers are trained on by our Professional Development team and the process administration is tracking include Lessons that are differentiated by a choice of content, process, or outcome goal. The grouping will be done based on student interest, skill readiness, or learning profile. The tactics employed by the teacher in the classroom will include flexible grouping, student choice, and learning centers. Ongoing monitoring and adjusting are crucial to a successful differentiation program.

Students in the 20-30% of grade level proficiency will be enrolled in the Trinitas Academy intervention program and move to



Tier 3 – Pull out intervention.

Tier 3 - Pull Out Intervention; Certain students will be identified as needing beyond classroom support and will be enrolled in the Trinitas Academy Intervention Program. Tier 1 and 2 interventions primarily occur with the classroom teacher. Tier 3 interventions for struggling early readers involve identification, constant monitoring, and small group pull-out instruction. In the intervention department, that team has a number of digital options, including the iReady English program and workbook, as well as the iReady assessment tool to monitor progress. Wilson Foundations (wilsonlanguage.com) has been identified as an intensive intervention system and will be available on an as-needed basis, as well as the open source resources found at Bookwork.com.

Suppose academic achievement expectations or goals are not met. In that case, the leadership team will also analyze data and operations to determine if there are deficiencies in instruction, including curriculum and/or teacher instructional techniques. The corrective action steps would include the following:

- Additional observations of teachers to identify poor instruction, classroom management, or root cause issues that may affect student outcomes.
- Referral to the school leadership team to analyze curriculum and resources to ensure proper state standards alignment.
- Revamp the Enrichment and Remediation instruction in middle school to better meet the needs of students not meeting academic expectations.
- Address teacher training and professional development offerings to address shortcomings in academic expectations or goals specifically.
- Analyze and adjust student ability grouping via differentiation in lower grades and class enrollment in middle school, where necessary. This would happen for both reading groups and the math block. The Principal would be responsible for implementing corrective action if expectations or goals are not being met. The Principal will enlist the assistance of the lead teachers, the AAC team and the schools governing board in order to take immediate corrective action.

Teacher-Based Benchmark and Final Exams: Teacher-created content-specific Benchmark and Final Exams are required in every Trinitas Academy course. These assessments provide teachers with essential data regarding the effectiveness of their teaching and the curriculum. Teacher-generated quarterly and mid-term exams allow teachers and students to measure the amount of learning at the mid-point of the semester. Final Exams allow teachers and students to summarily measure the total amount of learning over the entire semester. Triangulated with teacher-generated exams are the quarterly NWEA-MAP assessments, which benchmark each grade level to national cohorts.

Instructional staff will be trained and monitored on their formative and summative assessments occurring in their classroom. Some of the techniques teachers will be expected to implement include:

Formative:

• **Check for Understanding**

- Throughout the lessons, the Teacher will regularly check for understanding using a variety of methods.
 - Class response system – thumbs up, thumbs down
 - Q&A
 - Exit Tickets
 - Classroom quizzes.

• **Define Success – Socratic feedback and tracking** -The teacher provides students with an open-ended question related to a concept they are studying and asks the students to identify the information or details necessary for a response to demonstrate a full understanding of the concept. A list of these details is recorded on the board.

• **Quiz with Student Cross Grading** – Each unit of instruction, typically 4 weeks, will involve one or two quizzes prior to the End of Chapter Test. Fellow students will grade quizzes, and time will be devoted to pairs and sharing between students to solve quiz answers that are not correct.

Summative

• **End-of-Chapter Testing—Students will be given an end-of-chapter test with instructions to show their work. The grading rubric will include 75% of the overall grade for the correct answers and an additional 25% for correctly showing** how the student arrived at the answer.



- **Summative Assessment Analysis and Adjustment** –following summative assessment results, the teacher will determine if the entire class should be reinstructed on the particular topic or if a differentiation program should be implemented to ensure mastery of the subject.
- **Homework Help Program** Students are asked to place the homework they are struggling with on the board. Other students then begin working through the steps of solving the equation, with the student struggling with the work functioning as a teacher— fielding and directing the discussion.

Applicant Evidence :


Trinitas Academic Accounta...

Uploaded on **4/2/2024** by **Joe Higgins**

Q159. 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.



For general education students, the promotion criteria include meeting grade-level standards in reading, mathematics, science, and social studies and meeting attendance and behavior requirements. Students must also pass state assessments in reading and mathematics in third, fourth, and fifth grades and in science in fifth grade.

Attendance:

The Trinitas Academy Governing Board will adopt the North Carolina State Board of Education attendance criteria to ensure that students regularly attend school and progress toward their educational goals. Schools must monitor student attendance and communicate regularly with parents about their child's attendance status. If a student struggles with attendance, schools may provide interventions and support to help improve their attendance and prevent retention.

- For students in grades K-3, the promotion criteria require that the student not miss more than six days of school during the academic year unless the absences are due to a valid excuse such as illness, a family emergency, or a religious observance.
- For students in grades 4-8, the criteria for promotion require that the student not miss more than eight days of school during the academic year, unless the absences are due to a valid excuse.
- If a student does miss more than specified days of school, they must demonstrate proficiency in reading by passing a reading assessment in order to be promoted to the next grade level.
- Under the Read to Achieve program, students in kindergarten through third grade are required to take regular assessments to measure their reading proficiency. If a student is not reading at grade level by the end of third grade, the student may be retained in third grade until they can demonstrate proficiency.
- In addition to the assessments, our school will provide reading interventions and support to students who are not reading at grade level. These interventions are outlined in our assessment and intervention plan and may include one-on-one tutoring, small group instruction, and additional instructional time. Schools are also required to provide progress reports to parents on their child's reading proficiency and any interventions that are being provided.
- Parents are also encouraged to participate in their child's reading development by reading with their child at home and engaging in other literacy activities. Schools are required to provide parents with information on how they can support their child's reading development.

Special Populations

Promotion criteria may be modified for students with special needs based on their individualized education plans (IEPs). The IEP team, which includes the student's parents, teachers, and other professionals, determines the promotion criteria for each student based on their unique needs and abilities.

The promotion criteria for each grade level are communicated to parents and students at the beginning of the school year. These criteria outline the grade-level standards and expectations for students. Our school will also provide parents with regular progress reports and report cards indicating whether their child meets the promotion criteria.

Suppose a student does not meet the promotion criteria at the end of the school year. In that case, our administrative team may offer interventions and support to help the student catch up and meet the criteria for promotion. These may include summer school programs, tutoring, or additional instructional time during the school day. If a student with special needs does not meet the promotion criteria, the IEP team may convene to determine appropriate interventions and supports.

Q160. 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 students at risk of dropping out.



Promotion to the next grade will require an average of 70% or greater in Math, ELA, science, and history. Students who fall below their final grade will have the option of making up the core subject class during the summer or to be retained and repeat the grade. Prior to retention and failure, a detailed and robust system of interventions and oversight will have been implemented. These include:

- Identification of failing or struggling students (AAC team),
- Targeted interventions via a team approach (via the RTI team), that may include referral to the Special Education department, English Language Learning supports or outlining strategies for the classroom teacher to implement and monitor.
- Determination of community services is required to address at-home issues
- Utilization of after-school tutoring/interventions
- Targeted digital intervention tools (iStation, Schoology, iReady, etc.)

Our school's mission is to provide a **rigorous Classical Education** to all students, and mastery of core subjects is our goal. Suppose a student does not meet the promotion criteria at the end of the school year. In that case, our administrative team may offer interventions and support to help the student catch up and meet the criteria for promotion. These may include summer school programs, tutoring, or additional instructional time during the school day. If a student with special needs does not meet the promotion criteria, the IEP team may convene to determine appropriate interventions and supports. As needed, summer school options will be available for ELA and Math instruction. Teachers will be offered summer stipends to provide summer options. Should parents wish to seek online options, prior approval from the school Principal will be required to accept the makeup credits.

The promotion criteria for each grade level are communicated to parents and students at the beginning of the school year. These criteria outline the grade-level standards and expectations for students. Our school will also provide parents with regular progress reports and report cards indicating whether their child meets the promotion criteria.

In the first 3 years of operation, the school will focus on understanding exactly where each student is on their academic journey and work to help them be successful in the rigorous Classical Education model. Over time, as students spend time in the Trinitas Academy academic program, the curriculum, intervention, and instructional methods have a compounding effect, and our mission will be aligned. Patience and persistence will be our goal as we grow our school.

10.5. School Culture and Discipline

Q161. Describe the culture or ethos of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development.



Culture -- A positive culture is critical to a successful school. The Trinitas Academy Governing Board is committed to building a strong culture and measuring those efforts with quantitative metrics. The formula for a long and successful school is the combination of academic success, financial viability, and a strong culture where teachers want to teach and students are excited to learn. Our mission statement calls out partnerships with parents and **empowering, equipping, and training our teachers for success**. The culture we create, expect, and monitor is critical to our mission.

The foundation of the Trinitas Classical Academy culture is based on research by Dr. Rudolf Dreikurs, an Adlerian psychologist whose life work suggested that human misbehavior results from a lack of belonging to one's social group. When this happens, the child acts from one of four "mistaken goals": undue attention, power, revenge, or avoidance (inadequacy). Dreikurs' overall goal was for students to learn to cooperate reasonably without being penalized or rewarded because they would feel they were valuable contributors to the classroom.[1] This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of the academic and life success of the scholar. To simplify the theory, the Teddy Roosevelt quote, 'People won't care how much you know until they know how much you care.' opens the door to learning and is modeled in all aspects of Trinitas Academy.

Continuing with Dr. Dreikur's theory, Dr. William Glasser laid out the Choice Theory[2], which states that children's behavior is related to five basic needs: survival, love and belonging, power and significance, freedom and autonomy, and fun.

Both Dreikurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success.

Dr. Dreikurs

1. Always Speak in positive terms, and never be negative
2. Encourage students to strive for improvement, not perfection
3. Emphasize student strengths while minimizing weaknesses.
4. Help students learn from mistakes, which are valuable in learning
5. Encourage independence and the assumption of responsibility
6. Encourage students to help each other
7. Be optimistic and enthusiastic – a positive outlook is contagious.

Dr. Glasser

1. Stress Student Responsibility
2. Set Classroom Rules
3. Strive for ACCOUNTABILITY
4. Teach Students to Make VALUE JUDGEMENTS
5. Suggests Reasonable ALTERNATIVES – lay out CONSEQUENCES
6. Be CONSISTENT and REVIEW your STRATEGY often

The application and implementation of these concepts in the classroom look different at different grade levels. Perhaps the most impactful change we see in the younger classrooms is the abandonment of conditional discipline programs such as name on the board, prize boxes, or other condition-response behavior modification plans. At all grades, teachers have a series of touchpoints with families to engage parents in the process at school. These touch points include a positive call home within the first two weeks of school, greeting parents at pick up with a brief note of encouragement. We host parent-teacher conferences and engage in school-wide events for the Fall Festival, Holiday Recitals, Father/Daughter and Mother/Son dances, as well as our House System. Grade-level newsletters and communication tools like the Remind app are all part of our relationship-building model. Our mission is to partner with parents, and we achieve that through targeted communication. Both Glasser and Dreikurs have proven that intrinsic motivations have longer-lasting impacts on student behavior.

These foundational elements (Classical/Trivium, Charlotte Mason, Drs. Dreikurs, and Glasser) permeate our teacher training and expectations, our school leadership beliefs, our board governance, and classroom activities.

Each student deserves:

- An environment where teachers, support staff, and administrators lead by example and model what is good, true, and



beautiful. Our campus will work to foster meaningful student-faculty-parent interaction in alignment with the Adlerian philosophies of Dr. Rudolf Dreikurs and Dr. William Glasser, which focus on the power of relationships.

- A time-tested, standards-aligned curriculum that is designed to the needs, strengths, abilities, and learning style of each student to maximize student achievement;
- An environment reinforcing the Charlotte Mason philosophy that every individual has a unique potential that can be developed while understanding that not every student can be successful all of the time;
- An open and receptive learning atmosphere that respects and encourages the individual ideas and intellectual pursuits of every student and faculty member;
- Instructors that receive continuing education on the delivery, planning, academic, and emotional benefits of a Classical education.

The culture at Trinitas Academy is one of;

- High Expectations of the Scholars and Families
- Rigorous Academics
- The Power Of Relationships – “People Don’t Care What You Know...Until They Know You Care”
- Balance between subjects (Math is as important as Music)
- Values and Virtues are built into everything we do in the classroom, in the offices, and on the playground
- Life Long Learning – from students and teachers alike
- Discipline as teaching moments
- Every Student Matters – Every Student Has A Story
- Respect for the Teaching Profession
- Robert Greenleaf – Servant Leadership from the Governing Board to the Admin to Teachers to the Custodian. The singular focus is to serve scholars and families.

[1] Rudolf Dreikurs – Wikipedia - https://en.wikipedia.org/wiki/Rudolf_Dreikurs

[2] William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>

Q162. Explain how you will create and implement this culture for students, teachers, administrators, and parents starting from the first day of school. Describe the plan for acculturating students who enter the school mid-year.



This application details the myriad of ways that these above cultural norms are executed at every level, day in and day out.

- **Parent-Family Communication Strategy** -One of the key principles on which Trinitas Academy is founded is that parental involvement is essential in maximizing the scholar's educational experience. Our mission speaks to this, and partnering with parents is part of our Guiding Beliefs. In operation, we understand different families have demands on their time, and we work to equip our teachers and Principals with various communication tools. Communication includes monthly grade-level and campus-wide newsletters, individual teacher use of the Remind App (a school-based Twitter program), open houses, grandparent days, fall festivals, and more.
- **Volunteer Opportunities on Campus** Lunch monitoring or support, Service on the PTO Board, Subcommittee Service at Governing Board Request, before-and-after-care support, Tutoring, Coach—assistant coach.
- **School Advisory Committee (SAC)** - Trinitas Classical Academy intends to have an active and engaged Parent Teacher Organization and School Advisory Council. The Governing Board will establish a School Advisory Council beginning in year two. The School Advisory Council (SAC) will include members from the school community, including no less than one (1) member from the parent community, the teaching staff, administration, student leadership, and community members. The School Advisory Council will advise the Governing Board on policies relating to academics and extracurricular activities. The SAC will be asked to advise the Governing Board on budgetary priorities, community relations, and other issues identified by the Governing Board. The SAC will perform an annual stakeholder survey of the school community using the Net Promoter Score[1]. The results will be reported at the last Governing board meeting of the school year. The role of the SAC is advisory.
- **Phone Calls Home is a task required by all teachers for** all students. These calls will occur within the first two weeks of the start of school. The purpose of the call is to make contact, identify something positive about the scholar, and avoid any negative feedback. The first call/impression should always be honoring the parent's choice, asking for support at home, and covering something uniquely special about their child.
- **Remind App**– Trinitas Academy requires all teachers to set up a Remind App class code for their class. The app functions as a private messaging platform that allows the teacher to share homework assignments, photos of the whiteboard activities of the day, or tidbits about the class.
- **Newsletters—Grade-Grade-level and Campus-wide**—are suggested to go out bi-weekly but must go out monthly.
- **Meet the parents at the curb** – One of the norms of teaching at a Trinitas Academy requires that teachers meet their families at their cars at the end of the day. The brief moment in the pickup lines allows for a personal touch and a chance to give a word of encouragement or corrective action to the parent/guardian. Principal and Vice Principal staff are required to be at the drop-off and pick-up line as well. A highly visible Principal is a part of the Trinitas Academy mission.
- **House System** - An important channel through which the parents engage in the school will be the House System. As part of the Trinitas Classical Academy model, the school will implement a house system that creates 4 separate houses that students are enrolled into based on the grade bands that they are studying. 1st and 5th, 2nd and 6th, 3rd and 7th, 4th and 8th will each be enrolled in one of four houses.

The House system aims to connect various grades and students into a group that breaks down barriers and encourages connections. The parent leaders of each House use their creativity and energy to host one major school-wide event (Fall Festival, Holiday Events, etc.) and expand each house to opportunities to connect and serve in the greater community.

- **Leadership through the Scholar Senate.** Every Homeroom will have an election within the first month of each semester to elect 2 Scholar Senators. Scholar Senators will provide leadership at a homeroom level, a grade level, and a House Level. At the House Level, they will meet monthly with House Captains (parent volunteers) to help plan a service project and an assembly for their whole House. **The Role of the House Captain.** House Captains are the backbone that makes the House System work. They communicate with their House members and take leadership roles on campus.

In addition to the house system, the campus will have an active and engaged Parent-Teacher Organization that works within the house system framework to host the following annual events: the Fall Festival, Sweetheart Dance, Grandparents Day, and Math and Science Night.

For students joining our school mid-year, the house system becomes an important tool to make them feel welcome, instantly become part of a small community, and have mentors available to teach them our school's norms and values.

Q163. Provide a brief narrative that delineates how student conduct will be governed at the proposed charter school and how this plan aligns with the overall mission and proposed Education Plan of the charter school. Be



sure to include:

1. Practices the school will use to promote effective discipline.
2. A preliminary list and definitions of the offenses which may result in suspension or expulsion of students.
3. An explanation of how the school will take into account the rights of students with disabilities in regard 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.



Framework for Trinitas Classical Academy Discipline Policy

The Trinitas Classical Academy Discipline Policy reflects who we are as an organization and remains compliant with the legal mandates of school discipline. We believe it to reflect the following:

Our Mission: Consistent with the values we pursue in our mission statement.

Core Values: Academic Excellence, Partnering with Families and Children & Learning

Relational Discipline highlights the parent-teacher-student relationship to bring out the best in the child. Teachers and students developing meaningful relationships will only increase the student's sense of belonging to the school.

Guiding Principal:

- Life lessons, accountability, responsibility, and discipline are taught through natural consequences rather than "punishment."
- Teachers and students developing meaningful relationships will only increase the student's sense of belonging to the school.
- Developing positive relationships is based on the Golden Rule – "Treat others as you would want to be treated yourself".

School Operation:

Learning is fun in a safe, interactive, vibrant, and challenging environment.

- Everyone is responsible for contributing to the school community's greater good.
- We recognize the value of discipline policies and procedures in meeting our school's mission for all stakeholders.

The foundations of the Trinitas Academy discipline policy are based on research by Dr. Rudolf Dreikurs, an Adlerian psychologist whose life work suggested that human misbehavior results from a lack of belonging to one's social group. When this happens, the child acts from one of four "mistaken goals": undue attention, power, revenge, or avoidance (inadequacy). Dreikurs' overall goal was for students to learn to cooperate reasonably without being penalized or rewarded because they would feel they were valuable contributors to the classroom.[1] This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the student is the foundation of the academic and life success of the student.

Continuing with Dr. Dreikurs's theory, Dr. William Glasser laid out in Choice Theory[2], which is the idea that children's behavior is related to five basic needs: survival, love and belonging, power and significance, freedom and autonomy, and fun.

Both Dreikurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success. Some of these techniques include:

Dr. Dreikurs

1. Always Speak in positive terms, and never be negative
2. Encourage students to strive for improvement, not perfection
3. Emphasize student strengths while minimizing weaknesses.
4. Help students learn from mistakes, which are valuable in learning
5. Encourage independence and the assumption of responsibility
6. Encourage students to help each other
7. Be optimistic and enthusiastic – a positive outlook is contagious.

Dr. Glasser

1. Stress Student Responsibility
2. Set Classroom Rules
3. Accept NO EXCUSES
4. Teach Students to Make VALUE JUDGEMENTS
5. Suggests Reasonable ALTERNATIVES – lay out CONSCIENCES
6. Be CONSISTENT and REVIEW your STRATEGY often



These philosophies are the basis for the discipline policy training for school leadership and teaching staff.

Trinitas Academy's Discipline Policy is divided into levels of infraction. These cover most of the issues that will arise in a K8 school setting.

LEVEL 1 Misconduct

Level 1 misconduct is dealt with within the setting where the behavior took place. Staff discretion regarding natural consequences and/or referral to administration or communication with parents is afforded. If a pattern of Level 1 misconduct develops, it escalates to Level 2 and is dealt with accordingly.

Examples: (not limited to):

- Dress Code
- Minor Class Disruption
- Dishonesty
- Disrespect to staff, students, visitors and property
- *Rough-housing: pushing, shoving, wrestling*
- Inappropriate Display of Affection
- Profanity and/or inappropriate language or gestures
- Insubordination
- *Irresponsible in learning: tardies, excessive absences, incomplete homework, lack of effort and attentiveness, loitering in halls/bathrooms*

Level 1 Natural and Logical Consequences - Responsible Party: Teacher/Staff Member

Natural consequences occur without any enforcement on the part of the adult. Often, allowing the natural consequence to occur will prevent a teacher/student argument, and the child will learn the right lesson. Logical consequences involve actions taken by the adult.

Level 1 misconduct will result in a student filling out a Habit of the Heart Reflection Form and a Level 1 teacher given consequences. The teacher will keep a copy of the form in the student folder.

Examples (not limited to):

- Friendly Reminder
- Gentle Touch
- *Use of Proximity - get closer to the student*
- Use the "Thinking Chair" (set amount of time)
- *Practice following directions during student time (recess, specials, etc.).*
- Hold in for lunch/recess (eat with the teacher)
- Makeup wasted time during student time.
- Uniform Violation results in loss of dress down
- *Create a plan for behavior refinement on their own time*
- *Ignore students' behavior. When they want to do something, they do not get the opportunity to make up tardy minutes on student time.*
- Complete incomplete homework, receive no credit

****The list, as mentioned above, contains just a few of the possible consequences for Level 1 Misconduct. The implementation of consequences is given at the sole discretion of the administrator, teacher, or administrator designee.****

LEVEL 2 Misconduct

Level 2 misconduct will result in a referral to the school administration, and consequences will be assigned accordingly.



Parents/Guardians will receive communication regarding this incident.

Examples (not limited to):

- Level 1 misconduct with staff referral
- Cheating
- *Inappropriate clothing*
- Defacing school property and/or equipment
- Plagiarism
- Racial slurs or derogatory comments
- Pushing and shoving with the intent to harm
- Defiance
- Theft
- Forgery
- Misconduct during events that include community participation

Level 2 Natural and Logical Consequences: Responsible Party: Administration

Level 2 misconduct will result in an administrative referral, the student filling out a Habit of the Heart Reflection Form, the student calling home to inform the parents of misconduct, and a Level 2 consequence. The teacher will supply any previous documentation to the administration, and they will keep a copy of all documentation in the student folder.

Examples (not limited to):

- Any Level 1 consequence for an extended period
- Community Service
- *In School Suspension*
- *Short Term Out of School Suspension (1-2) Days*

****The list, as mentioned earlier, contains just a few of the possible consequences for Level 2 Misconduct. The implementation of consequences is given at the sole discretion of the administrator, teacher or administrator designee****

Level 3 misconduct will result in an IMMEDIATE referral to school administration and an inquiry completed by the administration designee to verify misconduct and determine the consequence. student, with the presence of the administrator, will call the parent/guardian to inform of misconduct and possible consequences. Level 2 misconduct includes Fighting, Physical Aggression toward another, Cheating on an exam or major assignment, Use of vulgarity/swearing, Weapon, Safety Concern of a dangerous nature, Sexual behavior, or intimations of such.

Response for Level 3. Level 3 misconduct will result in an IMMEDIATE administrative referral, a student filling out a Habit of the Heart Reflection Form, a student calling home to inform the parent of misconduct, and a Level 3 consequence. Appropriate consequences may include: In School Suspension, Short Term Out of School Suspension (3-5) Days, Behavior Contract upon Return (at the discretion of the Principal)

Level 4 misconduct will result in an immediate referral to school administration and requires immediate investigation and possible law enforcement involvement, as well as long-term suspension or expulsion. Level 4 misconduct includes Possession of a Weapon with the Intent to Harm, Endangerment or Aggravated Assault, Physical and Verbal Abuse of School Employee, Arson/ Explosive Devices, Bomb Threats or any threat that impedes and/or disrupts the educational process, Bullying, Physical, Verbal, Emotional, Cyber or Sexual, Sexual Harassment of any school community member, Harassment of any school community member based on gender, sexual orientation, race, religion or ethnicity, Possession or use of Illegal Substances on School property, Intent to Sell or Distribute Illegal Substances.

Responses to Level 4 misconduct will result in an immediate administrative referral. Responses to Level 4 misconduct may include a Long-Term Suspension (5 or more Days) or expulsion.



Harassment and Bullying:

Trinitas Academy will employ the following definition for harassment and bullying: systematic and/or continued unwanted and annoying actions by a person or group, including threats and demands. This behavior includes but is not limited to verbal, physical, or sexual harassment. All forms of harassment and bullying are strictly prohibited, resulting in severe disciplinary consequences. Behavior must meet these criteria to be defined as harassment and bullying, defined as any pattern of written, electronic, verbal, or physical acts or gestures directed at a student or a group of students that causes harm, reasonable fear of harm, or creates a hostile environment that substantially interferes with a student's educational performance, opportunities, or benefits. This behavior may take many forms, including but not limited to teasing, social exclusion, intimidation, physical violence, theft, or public humiliation. Additionally, the behavior is considered bullying when repeated or has the potential to be repeated over time.

The disciplinary provisions for bullying and cyberbullying apply to

1. bullying that occurs on or is delivered to school property or to the site of a school-sponsored or school-related activity on or off school property;
2. bullying occurs on a publicly or privately owned school bus or vehicle being used for transportation of students to or from school or a school-sponsored or school-related activity, and
3. cyberbullying occurs off school property or outside of a school-sponsored or school-related activity. For discipline to be imposed for off-campus cyberbullying, the conduct must either interfere with a student's educational opportunities or substantially disrupt the orderly operation of a classroom, school, or school-sponsored or school-related activity.

Special Populations and Discipline: These levels of response to misconduct allow for flexibility and a review of individual students and infractions. Response to misconduct involves natural consequences and engagement with parents at appropriate levels. Students with special needs or extenuating family challenges will be viewed in their totality rather than firm boundaries.

Discipline for Students with Disabilities (Qualifying under IDEA or 504): *Suspension for ten days or less.* Short-term suspension (ten [10] days or less) may be used for special education students for disciplinary reasons on the same basis as for a regular education student. (It is not considered a change of placement.)

Step 1: The students will receive notice, written or oral, of the reason for suspension and the evidence the school authorities have of the alleged misconduct.

- After receiving notice, the student will be asked to explain the situation.
- The authorized School personnel involved shall make reasonable efforts to verify facts and statements prior to making a judgment.

Step 2: Provided that a written record of the action taken is kept on file, authorized School personnel. No appeal is available from a short-term suspension.

Discipline appeal process: A parent or guardian may make a written request to the school Principal to appeal a long-term suspension or expulsion within one school day of receiving notification of the suspension. The Principal will generally schedule the Appeal Hearing within two school days of receiving the written request. The student may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The Principal will conduct the hearing. The hearing shall be closed to the public and may include presenting evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension is overturned, the student's cumulative record and any other school-maintained records will reflect that conclusion. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

Suppose the suspension or expulsion is upheld, and the parent or guardian wants to continue the appeal process. In that case, the parent or guardian may make a written request to the Trinitas Board Designee, stating why the suspension should be



reversed or modified within two school days of receiving the Trinitas Discipline Committee Appeal Hearing decision. The Hearing Officer will generally schedule the Appeal Hearing within two school days of receiving the written request.

Parent Education – Discipline Policy: Before starting the school year, the teaching staff receives cultural training on the foundation of Dr. Dreikurs and Dr. Glasser and how their theory on relationships best serves students. During this training, the school Principal will explain the infraction levels and the teacher’s role in discipline. A breakdown of tactics by infraction will be presented, and a clear definition of what actions will be sent to the administration for further discipline up to and including suspension and expulsion.

Each parent will be provided with a school discipline handbook as part of their parent handbook. Each family will be invited to an open house, where the handbook will be delivered and discussed in person. An online version, including an explanation video, will be emailed and available to the entire community on the school's website. All Parent/Student handbooks, including the discipline metrics, will be available on the Trinitas Academy website.

[1] Rudolf Dreikurs – Wikipeida - https://en.wikipedia.org/wiki/Rudolf_Dreikurs

[2] William Glasser Institute – Choice Theory - <https://wglasser.com/our-approach/choice-theory/>

Applicant Evidence :


Trinitas Discipline Framewo...

Uploaded on **4/2/2024** by **Joe Higgins**

10.6. Certify

Q164. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q165. Explanation (optional):

Dr. Nutting (Principal) teaches new teachers and masters-level administrators.

Mr. Higgins wrote *The Ultimate Toolbox for Classical Education and Charlotte Mason*, a comprehensive guide for homeschool, private, or public charter schools to successfully implement a Classical Education from K to 12th grade.

Many of this application's academic check and balance programs are from first-hand prior use. This work is based on their firsthand experiences operating public schools.



11. Governance and Capacity

11.1. School Governing Body

Q166. Organization Street Address (if you have one)

- On the Organization Information page, you already provided the mailing address.

1431 Mecklenburg Hwy
Mooresville, NC 28115

11.2. Governance

The private nonprofit corporation or municipality 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.

Q167. Using the attached resource as a template, please complete the table depicting the initial members of the nonprofit organization.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 3

Resources


Initial Members of the Nonp...

Applicant Evidence :


Trinitas - Initial Members of ...

Uploaded on **4/11/2024** by **Joe Higgins**

Q168. Describe the governance structure of the proposed charter school, including the governing board's functions, primary duties, roles, and responsibilities as it relates to overseeing the charter school. Include how the board will recruit, hire, and supervise the lead administrator.



The Trinitas Governing Board has established the following processes, subcommittees, and reporting periods for the academic, financial, and governance oversight of the school. These goals are a framework and may change from time to time depending on board composition or State of North Carolina policy changes that may affect the school. The Governing Board of Directors that has been assembled has the financial, real estate, legal background, non-profit leadership experience, public education experience, and business acumen to ensure a successful school launch.

These responsibilities include:

1. **Strategic Planning:** This role includes strategic planning for the short—and long-term goals set forth in this application, measuring and holding the school leadership accountable, maintaining a mission-aligned school culture, and being community ambassadors and stewards of the public trust in the school.
2. **Implementing our academic and operational Plan:** The governing board has the primary responsibility for implementing our schools academic performance, financial viability.
3. **Non-Delegable Duties:** The governing board holds final authority in key areas such as hearing employee grievances, adopting budgets, approving audit reports, adopting policies, and selecting or evaluating school leadership.
4. **Training Requirements:** Members of governing boards have committed to undergo specific training modules related to charter law, school finance, accountability, public funds, health and safety, the Open Meetings Act, the Public Information Act, and evaluating student outcomes.

The three standing committees that the Trinitas Academy board has established include:

Academic Oversight: As part of the academic oversight role of the Governing Board, the members will understand the academic goals established with the Principal and the Governing Board. Academic goals established will include increases in academic performance over State of North Carolina averages as well as against peer schools in the Iredell School District. These goals will be reviewed annually and take into account the board policy statement on what academic success looks like at Trinitas Academy. The school Principal will train the Governing Board on the academic accountability framework used by the State of North Carolina Department of Education. At least quarterly, the Principal will compile an academic progress report, including benchmark data, to the Governing Board (through and in conjunction with the Academic Sub-Committee) with any benchmark data that may be pertinent.

Establishment of a Board Academic Committee: The Academic Committee of the Governing Board will be established and shall consist of at least one Director/VP/Principal, School Principal/Administrator.

The Academic Committee shall meet at least four (4) times per school year. The purpose of the Academic Committee shall be to review school data, ensure academic expectations and goals are being met, and provide insight into instructional activities that meet the needs of the students.

The Principal will be tasked with creating a school-based Academic Accountability Committee (AAC), which will review benchmark data, teacher observations, and end-of-year NC State testing and prepare a report for the Board Academic Sub-Committee. This report will provide insight into curriculum effectiveness, professional development plans, and additional resources needed to address academic targets, as well as review the performance of special populations (ELL, special education, gifted).

Each year, the Governing Board will review a report from the Academic Committee at the end of the year State of North Carolina results, and establish academic goals. These goals will review past academic data, analyze the school's data against their peers, examine the State of North Carolina average test results, and incorporate any new policy or laws enacted by the State of North Carolina. These goals will be monitored and become a part of the Principal's annual performance review.

Financial Oversight: The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. As part of the Governing Boards financial oversight role, the Principal will provide an orientation to all new board members on the fiduciary role of a non-profit Governing Board. The Trinitas Governing Board will monitor break-even enrollment numbers and preliminary and annual budgets as presented by the Principal. As part of long-range planning for the school, the Governing Board will monitor a 5-year projected budget and analyze future needs that may significantly affect the budget.

Establishment of Finance Committee: The Finance Committee shall consist of at least two Directors, one of whom shall be the



Board's Treasurer and the School Principal. The Finance Committee shall meet at least two (2) times per school year. The Finance Committee shall prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly, analyzing the profit and loss, balance sheet, and budget vs actual. The Trinitas Governing Board wants to contract with an outside account group with experience with North Carolina public charter school accounting.

The Governing Board will establish financial policies and procedures and compile a manual to guide the Principal and school operations. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

- Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and reconciliation of bank accounts.
- A computer, word processor, typewriter, or ink will complete all documentation related to financial matters.
- The Governance Sub-Committee can appoint someone else to perform the Principal's responsibilities in the case of absence.
- Establishment of a Purchasing Policy - The Principal's may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
- Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, asset management are all policies that will be established by the Governing Board and executed by the Principal's.
- Petty Cash and Credit Card Use Policy will be established using framework that is generally acceptable to Charter School cash handling procedures.
- Contracts. Consideration of in-house capabilities to accomplish services before contracting for them will be considered. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of the need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the school's best interests.) Written contracts clearly define the work to be performed and will be maintained for all contract service providers (i.e., consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Principal's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Principal's will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Principal's and/or Member(s) of the Governance Sub-Committee with the conflict will excuse themselves from discussions and from voting on the contract.[1]

The Governing Board will commission an annual financial audit by an independent third-party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the North Carolina Department of Education. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year-end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

1. An audit of the accuracy of the financial statements
2. An audit of the attendance accounting and revenue accuracy practices
3. An audit of the internal control practices

Governance Oversight

Establishment of Governance Committee: The Governance Committee shall consist of at least two Directors and the Superintendent. The Governance Committee shall meet at least two (2) times per school year. The purpose of the Governance Committee will be to plan and develop Board Member orientation and training, identify and qualify new Governing Board members based on the approved recruitment policy, and ensure Board operations and policies are updated and compliant with State law.

Board Officer Descriptions

- Board Chair- The Board Chair will call and preside over all the meetings of the Governing Board. The Chairperson shall be



entrusted with the power to sign all certificates, consents, contracts, or other instruments of the School which the Board approves. The Chairperson shall exercise and perform such other powers and duties as may be prescribed by the Board from time to time. (Mark Lockman)

- Board Vice President- In the absence of the Chairperson or in the event of the Chairperson's disability, inability, or refusal to act, the Vice-Chair shall perform all of the duties of the Chairperson and, in so acting, shall have all of the powers of the Chairperson. The Vice-Chair shall have such other powers and perform such other duties as may be prescribed from time to time by the Board or by the Chairperson. (Walter Tribolet)
- Board Secretary and Treasurer- The Secretary shall keep or cause to be kept a book of minutes at the principal office or at such other place as the Board may order all meetings of the Board with the time and place of holding, whether regular or special and if special, how authorized, the notice thereof given, the name or names of those present at the Board meetings and the proceedings thereof. (Will Bowen)

The Board will regularly review the collective strengths and expertise of its members, with a focus on garnering expertise in the following areas: accounting; auditing; community service, curriculum development, education and teaching, educational leadership, fundraising, entrepreneurship, human resources; legal issues; management; marketing; public relations; real estate; and strategic planning. The Governing Board is committed to diversity in all aspects of its operations and activities at all levels of the school. The Governing Board highly values diversity and supports the election and appointment of diverse candidates to the Governing Board. The Board believes that having directors of diverse gender, race, and ethnicity, along with varied skills and experiences, contributes to a balanced and effective governance.

The Governance Committee will be responsible for recruiting new board members who are qualified in terms of training, education, and experience and who have garnered credibility and respect. New or replacement board members will be recruited as a seat becomes available. After the Charter Contract is approved, the existing Board will establish Board Classes with staggered terms so that there will not be a complete turnover of board members in a given year. Each year, at a duly noticed meeting, the Board will choose officers from among its members, including a president, vice president, treasurer, and secretary.

Qualifications of Future Board Members

The Trinitas Academy understands the importance of compiling a board of directors with different knowledge, skills, and abilities. The Trinitas Academy Governing Board will seek to fill board positions with individuals who meet the qualifications below:

- Governance Experience
- Organizational Leadership
- Education/ Teaching
- Education/ Administration
- Fundraising
- Marketing/ Promotion/ Public Relations
- Finance/ Accounting
- Business Development
- Community Connections
- Legal/ Regulatory
- Charter School Experience
- Grant Writing

In addition to recruiting board members with experience in one or more of the above disciplines, the following are required:

- Members must be legally eligible to serve on a Colorado Charter School Board.
- Share a passion for the school's mission and values.
- Understand the role and responsibility of being on the governing board in terms of time commitment, school representation in the community, and ethical conduct. The Trinitas Academy Governing Board operates under a code of ethics that maintains the highest integrity and commitment to serving the students, school, and community. The Board will adopt a comprehensive conflict of interest and anti-nepotism policy that describes the Board's ethical standards and procedures for identifying and addressing conflicts of interest, including the anti-nepotism provisions of North Carolina charter schools. This Policy also requires board members to sign an annual statement affirming their commitment and adherence to the Policy. The board also expects all administrative, instructional, and support staff members to adhere to the Code of Ethics of the Education Profession and the



Principles of Professional Conduct for the Education Profession, which is referenced in its Employee Handbook.

[1] National Charter School Resource Center

Q169. Describe the size, current and desired composition, powers, and duties of the governing board.

The current size of the Trinitas governing board is 8 members.

The Trinitas Academy governing board will have the following composition, powers, and duties:

Composition:

Diversity: The Trinitas governing board will consider diversity in background, experience, race, ethnicity, gender, business or industry experience, specialized skills, age, and community leadership in the selection of future board members. . The board will comprise of a demographic mix that closely mirrors the residents of the Mooresville area.

Skills: Members possess a range of skills relevant to the organization's needs, including non-profit board service, public policy, legal, financial, HR, and academic expertise.

Leadership: The board is and will continue to be comprised of respected leaders from the area who are committed to providing high-quality educational options.

Powers:

Mission and Vision: The Trinitas board has worked to develop and outline the school's mission, vision, and values. The focus of the board, through all the governance and bylaw structures is to ensure the school and the administration execute on the stated mission and vision.

Policy Development: Establish policies consistent with the school's mission and to ensure legal compliance with the State of North Carolina.

Oversight: Ensure compliance with statutory and regulatory requirements. Ensure oversight of the school administration by using a committee and reporting structure that allows for transparency and a clear vision of what success looks like

Legal and Financial Obligations: Responsible for legal and financial obligations of the school.

Duties:

Leadership: Communicate the school's mission and vision to the community.

Recruitment: Recruit and mentor future board members who share the school's values.

Accountability: Hold the school leader/Principal accountable for achieving the mission.

Fundraising: Participate in fundraising and community events if needed.

Stewardship: Provide visible leadership and stewardship for the school. Act as the face of our school to the larger community.

The governing board understands that they play a critical role in steering the organization towards a sustainable future by adopting sound governance practices, ensuring financial sustainability, hiring a school leader, and evaluating their efforts.

Q170. Describe the founding board's individual and collective qualifications for implementing the school design successfully, including capacity in such areas as school leadership, administration, and governance; curriculum, instruction, and assessment; performance management; and parent/community engagement.



The Opportunity – Reopen 75-Year-Old Mt. Mourne School

The efforts to plan and launch Trinitas Classical Academy are the work of our board, school leadership, and experts in the field of education. The group involved in bringing a closed Iredell Statesville School District campus back into operation. Mt. Mourne has been an active school for almost 100 years. Thousands of local Lake Norman area families have generations of family members who worked at or went to the school. When the Iredell District decided to sell the campus, it was purchased by a local business owner who went to the school. Rick Howard is not only an alumnus of Mt. Mourne, but his mother and son also attended the school.

Community Leaders Come Together

Mr. Lockman worked to bring together a board of diverse and experienced community members to serve as the stewards of the campus. Over multiple planning sessions, the group sought out an academic model that mirrors the community's beliefs and values. They selected Joe Higgins at Ethos Logos Publishing to ensure academic excellence and operational viability. The final addition to the team was identified as interim Principal Dr. Boen Nutting. Dr. Nutting recently retired as assistant Superintendent of the Iredell Statesville School District. During her 30-year career with the district, Dr. Nutting served as Principal of an International Baccalaureate K8 located at the Mt. Mourne campus.

Areas of Expertise

- **School Leadership & Administration**– Dr. Boen Nutting brings over 30 years of experience in the Iredell Statesville School District to the team. She served as a site principal at the Mt. Mourne school and was a district-level leader overseeing HR, communications, budget, special populations, and more. Board Chair Mark Lockman served at the district level of Iredell Statesville School District. He was the leader who implemented data-driven instruction as a pilot program, which was eventually adopted statewide.
- **Governance, Community Engagement** – Susan Tillis, Judge Marcus Long, and many Trinitas board members have years of experience in non-profit board service. Will Bowen has an extensive background in public policy communications and constituent outreach.
- **Curriculum and Performance Management** – Dr. Nutting and the team at Ethos Logos Publishing have extensive background in curriculum design, assessment, teacher performance and training as well as a focus on the legal and cultural nuances of running a successful public school.

Individual Background and Areas of Expertise of the Governing Board

Mikail Clark (Legal, Parent, 2 Generations of Classical Education Experience)

Mikail Clark is an accomplished professional focusing on business and finance, mergers and acquisitions, and securities. He holds an MBA and two bachelor's degrees from Liberty University. Mikail is an area attorney at Kilpatrick, Townsend, and Stockton. His area of expertise is business-related law. Mikail's mother is a lifelong teacher, including in Classical schools. Mikail's children attend a North Carolina Classical Charter School. He serves and volunteers in several organizations and is a graduate of Liberty University.

Judge Marcus Long (Legal, juvenile justice, foster care, addiction (ACEs), online safety)

Judge Long retired from Virginia and is a resident of Mooresville. During his career and retirement, Judge Long has been interested in juvenile justice, youth services, and education. He was a State of Virginia Circuit Court judge and retired in 2020. His contributions were so significant that a courthouse was renamed in his honor in Floyd County, Virginia. This renaming ceremony highlighted Long's legacy and the respect he garnered during his tenure on the bench. During his career on the bench, Judge Long established a family drug treatment court program and five adult drug treatment courts. Virginia's Lawyers Weekly named Judge Long a Leader in the Law in Virginia in 2016. Judge Long is on the executive committee of Safe Surfing, which advocates through schools to teach about the dangers of internet predators to children.

Susan Tillis (Real Estate, non-profit service, community leadership)

Susan is a long-term Charlotte resident and local realtor in the Cornelious and Davidson areas. Her adult children attended local schools, as did her grandchildren. Susan has served on several non-profit and community boards and has an extensive



background in state and national politics. Susan has been recognized as one of the Top 50 Women of Influence for women's important role in the Greater Charlotte Region in the economy, education, and not-for-profit fields. The NC Serves Award was awarded to Susan for her commitment to veterans and their families. She is the founder and chair of the Susan M. Tillis Foundation, which is dedicated to providing tools and assistance to these families of military and veterans nationwide.

Walter Tribolet, PhD (Business and operational management, parent)

Walter is a local father of children in an area school. He is from Sweden and settled in Charlotte with his wife and family. He's a business leader with a background in various industries. As a CEO, he has experience in the private sector driving highly profitable growth through strong financial systems, cost-effective operations, smart investments, and new business opportunities across consumer products and services organizations. He possesses a firsthand understanding of what is important to shareholders, stakeholders, employees, and the company.

Mark Lockman (District-level data-driven instruction – school start-up)

Mark was part of the district leadership at the Iredell School District and was instrumental in building the State of North Carolina's first data-based instructional model of public K12. His pioneering work was adopted statewide. Mark has adult children and is a leader in the area business community. Mr. Lockman was part of the founding group of Davidson Day School and had extensive experience in starting and growing a new school.

Joe Higgins (Prior CEO of Classical Charter schools)

Joe has spent a decade in public charter education, with an emphasis on Classical Education. He is the author of The Ultimate Classical Education and Charlotte Mason Toolbox, which helps homeschool, private, or public schools successfully implement a Classical model. Joe has an extensive entrepreneurial background and decades of C-level experience and is at the forefront of the Classical Education movement in America.

Anthony Famiglietti (Athletics and Arts, parent, community outreach and engagement)

Anthony is a recent transplant to the area where he moved his family for the quality lifestyle of North Carolina. As a four-time Olympic athlete, he is passionate about kids and the role of a well-rounded and diverse education that includes arts, athletics, and character development.

Will Bowen (Public policy, communication and outreach, parent)

Will Bowen is a young father and has been part of Congressman Patrick Henry's staff, focusing on communication and local constituency outreach and support. He served as the liaison for Cleveland, Iredell, and Lincoln Counties. He created partnerships with district civic leaders, government employees, and elected officials and was responsible for civic and governmental events, meetings, and celebrations. As a lifelong resident of North Carolina and a parent, he aims to provide choices for families like his in the Mooresville area.

Applicant Evidence :


Open House - March 12 24 - ...

Uploaded on **3/14/2024** by **Joe Higgins**

Q171. Explain how this governance structure and composition will help ensure that

- 1. The school will be an educational and operational success;**
- 2. The board will evaluate the success of the school and school leader; and**
- 3. There will be active and effective representation of key stakeholders, including parents.**



The Trinitas Academy governing board has put into place a series of checks and balances to ensure educational and operational success. The governance structure includes three standing committees, explained in prior question prompts with the primary roles of managing Academics, Finances and Governance.

There are ongoing reporting features that ensure how the school will be evaluated, including:

1. Academic Accountability Committee
2. School Leader (Principal) accountability
3. School Accountability Committee
4. Culture Analysis - Net Promoter Score
5. Finance Committee Oversight

Q172. Explain the procedure by which the founding board members have been recruited and selected. If a position is vacant, how and on what timeline will new members be recruited and added to the board?

The skills and dedication of the personnel who make up Trinitas Academy's founding charter school board are essential to its success. The board is responsible for the school's governance, oversight, and strategic direction.

In building our Governing Board, we employed the following selection and recruitment criteria included:

- Identify the key skills, expertise, and diversity needed on the board, such as education, finance, law, real estate, community engagement, etc.
- Recruit board members who are strongly committed to the school's mission and vision and have the capacity to provide effective governance, including strong community ties to the Mooresville area.
- We looked to ensure the board composition reflects the diversity of the community the school will serve.
- Establish clear roles and responsibilities for board members, such as the board chair, treasurer, secretary, etc.
- If a board position becomes vacant, the remaining board members should recruit and select new members promptly. The charter school's bylaws outline the process for filling board vacancies, including the role of the Governance Committee in soliciting and screening new board members. The criteria used in recruitment include:
 - Identifying the needed skills and expertise for the vacant position
 - Determining the direction of the school and what may be needed in the future.
 - Actively recruiting candidates from the local community or professional networks
 - Evaluating candidates based on their qualifications and fit with the school's mission.
 - Voting to approve new board members with a majority vote.

The timeline for filling a board vacancy will depend on the school's bylaws but should be done promptly to ensure continuity of governance.

Q173. Describe the group's ties to and/or knowledge of the target community.



Susan Tillis (Real Estate, non-profit service, community leadership)

Susan is a long-term Charlotte resident and local realtor in the Cornelious and Davidson areas. Her adult children attended local schools, as did her grandchildren. Susan has served on a number of non-profit and community boards and has an extensive background in state and national politics. Susan has been recognized as one of Top 50 Women of Influence for women's important role in the Greater Charlotte Region in the economy, education, and not-for-profit fields. The NC Serves Award was awarded to Susan for her commitment to veterans and their families. She is the founder and chair of the Susan M. Tillis Foundation, which is dedicated to providing tools and assistance to these families of military and veterans nationwide.

Mark Lockman (District level data-driven instruction – school start-up)

Mark was part of the district leadership at the Iredell School District and was instrumental in building the State of North Carolina's first data-based instructional model of public K12. His pioneering work was adopted statewide. Mark has adult children and is a leader in the area business community. Mr. Lockman was part of the founding group of Davidson Day School and has extensive experience is starting and growing a new school.

Anthony Famiglietti (Athletics and Arts, parent, community outreach and engagement)

Anthony is a recent transplant to the area where he moved his family for the quality lifestyle of North Carolina. As a four-time Olympic athlete, he is passionate about kids and the role of a well-rounded and diverse education that includes arts, athletics, and character development. He currently coaches dozens of young adults in track and field.

Will Bowen (Public policy, communication and outreach, parent)

Will Bowen is a young father and has been part of Congressman Patrick Henry's staff, focusing on communication and local constituency outreach and support. He served as the liaison for Cleveland, Iredell, and Lincoln Counties. In his role he created partnerships with district civic leaders, government employees, and elected officials and was responsible for civic and governmental events, meetings, and celebrations. As a lifelong resident of North Carolina and a parent, his goal is to provide choices for families like his in the Mooresville area. Will is a member of Rotary and volunteers with community projects he is passionate about.

Walter Tribolet PhD (Business and operational management, parent)

Walter is a local father of children in an area school. He is from Sweden and settled in Charlotte with his wife and family. He's a business leader with a background in various industries. As a CEO, he has experience in the private sector driving highly profitable growth through strong financial systems, cost-effective operations, smart investments, and new business opportunities across consumer products and services organizations. He possesses a firsthand understanding of what is important to shareholders, stakeholders, employees, and the organization.

Mikail Clark (Legal, Parent, 2nd Generations of Classical Education Experience)

Mikail Clark is an accomplished professional focusing on business and finance, mergers and acquisitions, and securities. He holds an MBA and two bachelor's degrees from Liberty University. Mikail is an area attorney at Kilpatrick, Townsend, and Stockton. His area of expertise is business-related law. Mikail's mother is a lifelong teacher, including in Classical schools. Mikail's children attend a North Carolina Classical Charter School. He serves and volunteers in a number of organizations and is a graduate of Liberty University.

Judge Marcus Long (Legal, juvenile justice, foster care, addiction (ACEs), online safety)

Judge Long is a long-time resident at the Point, Trump National in the Mooresville area. He is active in the community, including prayer groups, and is a member of the Lake Norman Lake Commission. Judge Long is on the executive committee of Safe Surfing, which advocates through schools to teach about the dangers of internet predators to children.

Q174. Outline the strategic board calendar detailing how often the board will meet according to the bylaws established.



Following is the Trinitas Academy Governing Board's proposed annual calendar:

Board Meetings

- The board will hold monthly meetings throughout the year to discuss key school matters.
- These monthly board meetings will allow the board to stay up-to-date on the school's academic performance, finances, operations, and governance

Committee Meetings

The board will have the following standing committees that will meet quarterly:

- Academic Oversight Committee
- Finance Committee
- Governance Committee

These committee meetings will allow for more detailed discussions and oversight in their respective areas.

The committees will then report back to the full board during the monthly meetings.

Annual Board Retreat

The board will hold an annual board retreat to focus on strategic planning, board training, and strengthening board connections.

This retreat will cover topics such as the school's high-level priorities, board assessment results, school stakeholder survey results, end-of-year academic results, the Principal review, board recruiting and succession planning, and setting annual board goals

The retreat will help the board take a wider view and have in-depth discussions that are not possible during regular monthly meetings.

Other Key Dates

In the summer (July-September), the Governance Committee will review the board composition and structure and plan for any needed board recruitment.

In the fall (October-December), the Finance Committee will develop multi-year budget scenarios, and the full board will review the annual audit.

In the winter (January-March), the Governance Committee will finalize the Principal's performance goals and the board's self-evaluation process.

Q175. What kinds of orientation or training will new board members receive, and what kinds of ongoing professional development will existing board members receive? The plan for training and development should include a timetable, specific topics to be addressed, and requirements for participation.



The Governing Board of Trinitas Academy is prepared to undergo board training during the fast-track planning period. The NC DEI has a predetermined training schedule that board members will attend virtually or in person. The areas of training that our governance committee will provide for new board members will include the following modules, which detail the roles and responsibilities of a public charter school in the State of North Carolina. We look to work with the North Carolina Association of Public Charters or the National Alliance for Public Charter Schools on content, time requirements, and state compliance for all new board member training.

The following leadership members will undergo board orientation:

- Members of the governing body
- Principal
- Office Manager

The curriculum and content of the board training will include:

- **Strategic Development and Capacity-Building**
 - Board Roles, Responsibilities, and Relationships
 - Working as a Board: Collaborative Problem Solving and Decision-Making
 - Board Building: Expectations, Obligations, and Self-Assessment
 - Interpersonal Communication, Relationships, and Leadership
 - Working with and Through Others: Facilitative Leadership for Board Chairs
 - Board Building: Leveraging Individual and Governance Team Strengths
 - Building an Ethical Board: Ethics Laws, Codes, and Conflicts of Interest
 - Governing Charter Schools: Moral Obligations and Ethical Responsibilities of Board Members. Duty of Loyalty - Fiduciary Duties - Conflicts of Interest and Nepotism
- **Board Meetings Expectations and Requirements**
 - Board Meetings: Communication, Participation, and Operating Principles and Procedures
 - Open Meeting Laws
- **Financial Compliance and Accountability**
- **Legal Requirements of Public Charter Schools**
 - Student Admissions and Withdrawals
 - Non-Discrimination
 - Filling Vacancies
 - Withdrawal or Expulsion
 - Discipline
 - The Individuals with Disabilities Education Act (IDEA).
- **Policies, Internal Controls, and Budgeting**
- **Financial, Budget, and Resource Planning and Development**
 - Essentials of School Financial Management
 - Understanding Audited Financial Statements
 - Developing Sound Financial Policies
 - Planning for Long-Term Fiscal Sustainability
 - Budgeting for Charter Schools
 - Introduction to Accounting
 - Introduction to Purchasing
 - Basics of Payroll Administration
 - Internal Controls for Managing Risk
- **Academic Accountability- Understanding of Performance Expectations and Compliance**
 - Understanding the North Carolina State Standards.
 - Special Education, Bilingual, and Gifted and Talented Populations.
 - How to Assess Our Principal. Role of the Principal, Relationship With The Board, Job Duties
- **Community Engagement**
- **Human Resources and Personnel**
 - Essentials of School Personnel Management
 - Recruiting, Hiring, and Maintaining Your School Leader



- Setting Performance Expectations and Evaluating Your School Leader
- **Admissions and Enrollment**
- The Open Enrollment Laws and Lottery
- Expulsion and Appeal Process and the Board Involvement
- **Policy Choices in Charter Schools:**
- Visions, Values, and Goals
- Policy Problem Solving
- Policy Decision Making: Federal, State, and Local

Q176. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved; discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

The key steps the Trinitas Academy Governing Board will take to identify and address conflicts of interest are:

- Establish a clear conflict of interest policy. This policy will define what constitutes a conflict of interest, outline the procedures for disclosing potential conflicts, and specify how conflicts will be addressed and documented.
- Require annual disclosure statements from all board members, officers, and key employees. These statements should list any financial, professional, or personal affiliations that could create a conflict of interest.
- When a potential conflict arises, the affected board member must fully disclose the nature of the interest and recuse themselves from any discussion, lobbying, or voting on the matter.
- The remaining disinterested board members must then determine if the transaction or vote is in the organization's best interest and document their rationale for approval.
- The minutes of meetings where conflicted matters are discussed and voted on must record the disclosure, abstention, and reason for approval.
- The board will periodically review all compensation and procurement/vendor arrangements to ensure they are reasonable and do not constitute an inappropriate private benefit.
- The board will provide training on conflicts of interest to ensure all members understand their duty of loyalty and how to identify and address potential conflicts.
- The organization will maintain all documentation related to disclosed conflicts and how they were resolved in secure corporate records.

Q177. Explain the decision-making processes the board will use to develop school policies.



The Trinitas Academy Governing Board will develop and approve policies that guide the school's operations and decision-making. These policies are standard among most North Carolina charter schools, and we will look to the Department of Education, The North Carolina Association of Charter Schools, and other peer charter schools for guidance on policies that are needed prior to opening.

Going forward, the key processes our school governing board will use to develop school policies include the following:

- The board will seek out established policies related to governance, financial management, personnel, students and families, and other key areas.
- Our adopted board policies will be reviewed and revised at least annually.
- When developing new policies, the board will have a process for reviewing and approving any new policy. This process will include research on the legal ramifications of a potential policy, best practices from peer charters or the State of North Carolina, and a robust discussion and debate on the impact of a proposed policy. This due diligence may include reviewing policies by legal counsel or other qualified experts before board approval.
- A quorum of the Governing Board members must approve all policies.
- The board will ensure that relevant policies are communicated to and understood by staff, students, and parents. This includes including relevant policies in staff handbooks, student/parent handbooks, web updates, and manuals.
- The board will work collaboratively with the school leader to set annual goals for the school and the school leader, which can inform policy development.
- The board will also have a process for monitoring progress toward policies enacted and how they align with the school's mission and five-year plans.
- The Governance Committee will be responsible for monitoring the above process.

Q178. 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 Trinitas Governing Board has established the following processes, subcommittees, and reporting periods for the academic, financial, and governance oversight of the school. These goals are a framework and may change from time to time depending on board composition or State of North Carolina policy changes that may affect the school.

Academic Oversight: As part of the academic oversight role of the Governing Board, the members will understand the academic goals put forth in the Charter Contract and draft a board policy statement on what academic success looks like at Trinitas Academy. At least quarterly, the Principal will compile an academic progress report, including benchmark data, to the Governing Board with any benchmark data that may be pertinent.

Establishment of a Board - Academic Committee: The Academic Committee shall consist of at least one Director, the Principal, and the School Principal.

The Academic Committee shall meet at least four (4) times per school year. The purpose of the Board Academic Committee shall be to review school data, ensure academic expectations and goals are being met, and provide insight into instructional activities that meet the specific needs of the students.

As detailed under the school's academic performance plan, the school-based Academic Accountability Committee (AAC) will review benchmark data, teacher observations, and end-of-year North Carolina end-of-year testing and prepare a report for the Board Academic Committee. This report will provide insight into curriculum effectiveness, professional development plans, and additional resources needed to address academic targets.

Each year, the Governing Board will review a report from the Board Academic Committee end-of-year State of North Carolina EOA, assessment results, and establish academic goals. These goals will review past academic data, analyze the school's data against their peers, the State of North Carolina average test results, and incorporate any new policy or laws enacted by the State of North Carolina. These goals will be monitored and become a part of the Principal's annual performance review. (Attached is a graphic of the Academic Accountability Committee process)

Financial Oversight: The Governing Board understands the short and long-term economics of the school and has systems in place to monitor short and long-term financial health. As part of the Governing Board's financial oversight role, the Principal will orient all new board members to the fiduciary role of a non-profit Governing Board in North Carolina. The Governing Board will monitor break-even enrollment numbers and preliminary and annual budgets as presented by the Principal. As part of long-range planning for the school, the Governing Board will monitor a 5-year projected budget and analyze future needs that may significantly affect the budget.

Establishment of Finance Committee: The Finance Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer and the Principal and School Principal. The Financial Committee shall meet at least two (2) times per school year. The purpose of the Financial Committee shall be to prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration. Financial reporting will be reviewed monthly, analyzing the profit and loss, balance sheet, and budget vs actual. The Governing Board will establish financial policies and procedures and compile a manual to guide the Principal and school operations. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

1. Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and bank account reconciliations.
2. Computer, word processor, typewriter, or ink will complete all documentation related to financial matters.
3. The Governance Council can appoint someone else to perform the Principal's responsibilities in the case of absence.
4. Establishment of a Purchasing Policy - The Principal's may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
5. Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management,



asset management are all policies that will be established by the Governing Board and executed by the Principal's.

6. Petty Cash and Credit Card Use Policy will be established using a framework that is generally acceptable to Charter School cash handling procedures.

7. Consideration will be made of in-house capabilities to accomplish services before contracting for them. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of the need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the school's best interests.) Written contracts clearly define the work to be performed and will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Principal's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Principal's will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Principal's and/or Member(s) of the Governance Council with the conflict will excuse themselves from discussions and voting on the contract.[1]

The Governing Board will commission an annual financial audit by an independent third-party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to NC DPI. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 prior to year-end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

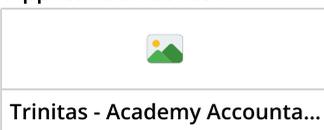
1. An audit of the accuracy of the financial statements
2. An audit of the attendance accounting and revenue accuracy practices
3. An audit of the internal control practices

Establishment of Governance Committee: The Governance Committee shall consist of at least two Directors and the Principal. The Governance Committee shall meet at least two (2) times per school year. The purpose of the Governance Committee will be to plan and develop Director orientation and training, identify and qualify new Governing Board members based on the approved recruitment policy, and ensure Board operations and policies are updated and compliant with State law.

The Governing Board will establish a School Advisory Council beginning in year two. The School Advisory Council (SAC) will include members from the school community, including no less than one (1) member from the parent community, the teaching staff, administration, student leadership, and community members. The School Advisory Council will advise the Governing Board on policies relating to academics and extracurricular activities. The SAC will be asked to advise the Governing Board on budgetary priorities, community relations, and other issues identified by the Governing Board. The SAC will be tasked with performing an annual stakeholder survey of the school community and presenting the results at the last Governing board meeting of the school year.

[1] National Charter School Resource Center

Applicant Evidence :



Uploaded on **4/5/2024** by **Joe Higgins**

Q179.Discuss the school's grievance process for parents and staff members.



Student Discipline appeal process: A parent or guardian may make a written request to the school Principal to appeal a long-term suspension or expulsion within one school day of receiving notification of the suspension. The Principal will generally schedule the Appeal Hearing within two school days of receiving the written request. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The Principal will conduct the hearing. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension is overturned, the cumulative record of the scholar and any other school-maintained records will reflect that conclusion. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

Suppose the suspension or expulsion is upheld, and the parent or guardian wants to continue the appeal process. In that case, the parent or guardian may make a written request to the Trinitas Board Designee, stating why the suspension should be reversed or modified within two school days of receiving the Trinitas Discipline Committee Appeal Hearing decision. The Hearing Officer will generally schedule the Appeal Hearing within two school days of receiving the written request.

Employee Grievance Appeal to Governing Board

If an employee is not satisfied with the outcome of the formal grievance process at the school level, they have the right to appeal the decision to the school's governing board.

To file an appeal, the employee must submit a written request to the board chair within 15 calendar days of receiving the final written response from the school administration. The request must include:

- The original formal grievance form
- Any relevant evidence or documentation
- An explanation of why the employee is seeking an appeal of the decision

The governing board chair will contact the employee to schedule a meeting, typically within 10 school days of receiving the written appeal. The meeting will allow the employee to present their case directly to the board.

After the meeting, the governing board will conduct a thorough and impartial grievance review.

The board will provide a final written decision to the employee, typically within 30 school days of receiving the appeal. This decision will explain the outcome and rationale.

The governing board's decision on the grievance appeal is final. The school prohibits retaliation against an employee for filing a grievance in good faith or participating in the grievance process.



Q180. Attach as Appendix G Organizational Chart

- 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).

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Evidence :


Org Chart - Year 1 Trinitas -2...

Uploaded on **4/4/2024** by **Joe Higgins**



Q181. Attach as Appendix H Charter School Board Member Information Form and Resume

- A one-page resume from each founding board member and responses to the questions found on the Charter School Board Member Form

Upload Required File Type: pdf, excel, word Max File Size: 30 Total Files Count: 50

Resources



2024 Charter School Board ...

Applicant Evidence :



Will Bowen Resume.pdf

Uploaded on **4/17/2024** by **Joe Higgins**



Board Question - Mark Lock...

Uploaded on **4/17/2024** by **Joe Higgins**



Joe Higgins - Board Question...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Resume - Mark Lock...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Question - Walter T - ...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Questions - Mikail Cla...

Uploaded on **4/17/2024** by **Joe Higgins**



Susan Tillis Biography.pdf

Uploaded on **4/17/2024** by **Joe Higgins**



Markus Long - Trintias Boar...

Uploaded on **4/17/2024** by **Joe Higgins**



Mikail Clark Resume (May 2...

Uploaded on **4/17/2024** by **Joe Higgins**



Joe Higgins - Resume Trinita...

Uploaded on **4/17/2024** by **Joe Higgins**



DR. WALTER C. TRIBOLET-Re...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Docs - Marcus Long - ...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Docs - Anthony F - Tri...

Uploaded on **4/17/2024** by **Joe Higgins**



Board Docs - Susan Tillis - Tr...

Uploaded on **4/17/2024** by **Joe Higgins**



Will Bowen - Trinitas Questi...

Uploaded on **4/23/2024** by **Joe Higgins**

Q182. Attach Appendix I For Each Board Member

1. Charter School Board Member Background Certification Statement and
2. Completed Background Check

PLEASE NOTE: A background check that does not meet the following requirements will be deemed incomplete and could jeopardize the submission status of your application.

- Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used).
- Background check must include any additional aliases that have been used by the individual.
- Background check must include a completed county level check for any county returned in the Social Security Trace.
- Background check must include a completed nationwide check.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 50



Resources

2024 Charter School Board ...

Applicant Evidence :

Board Background - Walter ...

Uploaded on **4/17/2024** by **Joe Higgins**

Board Docs - Susan Tillis - Tr...

Uploaded on **4/17/2024** by **Joe Higgins**

Board Background - Mark L...

Uploaded on **4/17/2024** by **Joe Higgins**

Joe Higgins - Board Backgro...

Uploaded on **4/17/2024** by **Joe Higgins**

Board Docs - Marcus Long - ...

Uploaded on **4/17/2024** by **Joe Higgins**

Board Docs - Anthony F - Tri...

Uploaded on **4/17/2024** by **Joe Higgins**

Will Bowen - Trinitas Backgr...

Uploaded on **5/17/2024** by **Joe Higgins**

Board Background - Mikail C...

Uploaded on **5/17/2024** by **Joe Higgins**

20240522 Mark DeWitt Lock...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Walter Christian T...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Joseph Thomas Hi...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Marcus Harding L...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Anthony Nicholas ...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 James William Bo...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Susan Marie Tillis...

Uploaded on **5/22/2024** by **Joe Higgins**

20240522 Mikail Orestes Cla...

Uploaded on **5/22/2024** by **Joe Higgins**

Q183. Attach as Appendix J Proposed By-Laws of the Nonprofit Organization or Municipality 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.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 3

Applicant Comments :

Added Amended Bylaws

Applicant Evidence :

Amended Bylaws - NC Open ...

Uploaded on **5/20/2024** by **Joe Higgins**

Conflict Of Interest Policy - ...

Uploaded on **4/17/2024** by **Joe Higgins**

BYLAWS_Classical Education...

Uploaded on **4/17/2024** by **Joe Higgins**

Q184. Attach Appendix K Articles of Incorporation or Municipal Charter

- If the applicant is a non-profit board of directors, attach a copy of the articles of incorporation from the NC Department of the Secretary of State.
- If the applicant is a municipality, attach a copy of the municipal charter.



Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Evidence :

Articles of Incorporation of ...

Uploaded on **4/17/2024** by **Joe Higgins**

Articles of Incorporation of ...

Uploaded on **4/17/2024** by **Joe Higgins**

11.3. Staffing Plans, Hiring, and Management

Q185. Projected Staff Complete the staffing chart below outlining your staffing projections. Adjust or add functions and titles as needed to reflect variations in school models. Be mindful that your predicted administration and staff match the projected enrollment noted in Section I, course offerings, and align with the proposed budget.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10

Resources

Staffing Chart Template.xlsx

Applicant Evidence :

Staffing Chart - Trinitas Aca...

Uploaded on **4/13/2024** by **Joe Higgins**

Q186. Staffing Plans, Hiring, and Management Explain the board's strategy for recruiting and retaining high-performing teachers.



Recruitment timeline:

A new hire represents the school and its future and will help shape its image, culture, and students for years to come. Hiring decisions are critical to the success of the school and to student success in the classroom. The school Principal has been identified as Dr. Boen Nutting. Her contract will be finalized, and the school leader will be on board beginning in April/May of 2025.

Recruitment for the Teachers, Special Education Specialist, Registrar/School Assistant, Office Manager, Student Services, Counseling, Curriculum/Data/PD Coach, and Classroom Assistants will begin in January 2025.

Dr. Butting is an adjunct professor who teaches new teachers and candidates for the Master of Education Leadership. Her long-time involvement in the Mooresville area will greatly help teacher recruitment.

Trinitas Academy will have the operations/business manager in place on or around April 2025. Employment for both will begin by May 1, 2025. The Principal will start the process of hiring teachers and support staff. Teachers will be interviewed in January 2025, and the employment agreement will be executed in June 2025.

Employment will begin on July 1, 2025. Teachers will be contracted for 11 months and work 190 contract days, which the budget reflects. The marketing program for teacher recruitment is thorough and reaches potential staff members via print, social media, and open houses. The recruitment will include job postings and marketing to reach area teachers.

Personnel policies will be developed before hiring the Trinitas Academy staff. The first step is to select a Professional Employer Organization (PEO) Payroll company. The school will select PEOs specializing in Human Resource Management services, payroll processing, state and federal tax compliance, and benefits administration. These tasks are complicated and crucial to employee satisfaction. PEOs provide a unique co-employment model that grants small employers like Trinitas Academy access to Fortune 500-level benefits, standardized HR policies and practices, risk management support, and workers' compensation coverage, plus an extensive library of training resources to educate employees and partners on various topics.

Typically, a PEO will provide the framework for personnel policies and procedures as they serve in a co-employment role. The Principal will contract with a North Carolina HR attorney to ensure State of North Carolina policies and laws are addressed.

Marketing recruitment and placement: Costs for recruiting and hiring are allocated to the start-up budget and detailed below. Marketing for prospective teachers and staff will begin 10 months after the proposed open date. A series of marketing events and efforts will be employed, including job fairs, digital recruitment, print publications, and association marketing.

The Principal is primarily responsible for overseeing the selection process and will be the one to offer a contract. Trinitas Academy will offer the following to interested candidates of our school:

1. Submit an application that will be provided online.
2. Check the references included with the application.
3. Submit a cover letter and resume with the application.
4. The candidate will be asked to participate in a teaching demonstration.
5. The candidate will be asked to submit a written lesson plan prior to the demonstration.
6. The Principal will conduct the interview; once the administrative team is in place, they will also be a part of the interview process, and more than one interview will take place.

Trinitas Academy will contract with an employee payroll and management company for payroll processing and legal support during the employee lifecycle.

Advertising and Recruitment Strategy

News Print ADS – Job fair February and March

Pearland's Community Impact Paper (circulation 76,305)



2 ads (4 total) job fair - \$318.75 each \$1,275 total

Mailers: Total \$1,031.74

Website - Post job openings - Linked In, InDeed, and others

Social Media - Promote opening through FB, targeting teachers

Total paid ads for 3 months \$2,500

Non-Media Strategy for Recruitment: The Principal will hold a series of local events with the sole purpose of *Teacher Recruitment* and place advertising this event on the radio, at nearby colleges, and through social media.

Advertise open positions through social media, radio, and online job boards. Advertise open positions with college and university job boards. Establish relationships with local colleges and universities to open lines of communication within their education programs and create partnerships with local institutions of higher learning.

Total \$4,806

Hiring - Hiring new faculty and other staff may be the most important decisions the senior administrator makes with Trinitas Academy.

The hiring decisions are critical to the school's and student's success in the classroom. The Principal is primarily responsible for overseeing the selection process and will be the one to offer a contract. Trinitas Academy will offer the following to interested candidates of our school:

1. Submit an application that will be provided online.
2. Submit a cover letter and resume with the application.
3. The Operations Assistant will screen applications for minimum qualifications. Check the references included with the application.
4. Fingerprint Clearance process
5. The candidate will be asked to participate in a teaching demonstration.

Teacher Retention and Stakeholder Satisfaction Measurement Study after study points to the single biggest factor of student achievement being a strong teacher in the classroom. To that end, the goal of the Trinitas Academy governing board is to achieve 85% teacher retention by year three. A focused approach to teacher recruitment, hiring, training, and discipline is crucial to achieve this objective. At every level, the governing board believes in the Robert Greenleaf Servant Leadership Model[1]. From principal to custodian, the school staff supports students, families, and each other.

Tracking and Monitoring Teacher Performance: (See Attached Loti Forms and Reporting under 11.4) Trinitas Academy will implement the LoTi Teacher Evaluation System (Levels of Teaching Innovation), teacher evaluation, and student engagement system. The LoTi evaluation tool gives the Professional Development and Administration team an actionable report to determine where each teacher in the school is professional. The reporting will tell the management team if school-wide issues in teacher performance exist and whether a coach should be targeted to select teachers.

LoTi helps our leadership deliver consistency in teacher training, curriculum implementation, and classroom observations. These scoring metrics are consistent and measurable, allowing the site Administration to identify issues and implement additional training, more one-on-one coaching, or corrective actions.

Drop-in observations will also ensure that all teachers are required to post State of North Carolina-aligned learning objectives for each lesson. These are available to the PowerSchool/Schoology LMS teachers in the form of 'I Can Statements' aligned to each core subject.

To ensure standard adherence, quality instruction, and fidelity to curriculum, Trinitas Academy will employ a series of overlapping systems, including:



1. The standards-aligned curriculum delivered via Schoology
2. Lesson planning, auditing, and monitoring
3. Data assessment via NWEA-MAP testing.
4. Ongoing teacher evaluation and feedback using the LoTi teacher evaluation tool. The administration and the PD team will use this tool and cross-compare with each other.
5. Master Teacher or Lead Teacher support at particular subject areas or grade levels
6. A comprehensive Professional Development department managed and delivered in person or through any of 75+ courses on individual teaching skills located in the Schoology LMS Library.
7. Administration training and board oversight of the administrator's role.

Net Promoter Score Staff and family surveys will be sent each year (in March-April) by the governing board to get candid feedback on how the school is performing. The surveys will focus on the Net Promoter Score concept, developed by (and is a registered trademark of) Satmetric. Fred Reichheld introduced it in his 2003 Harvard Business Review article "One Number You Need to Grow"[2]. The Net Promoter Score (NPS) survey asks stakeholders, which include staff and parents, 'On a scale of 1 to 10, would you refer our school to a friend?' The idea of NPS is that every step of the employee or parent experience must function well for a high score for the entire school. From the front desk to clean floors to teachers in the classroom, all portions of the school's operations must function properly to receive a high NPS score. If there is a constant and focused effort on serving the teachers, families, and students, potential unsatisfactory leadership, teacher, or staff performance can be identified quickly.

Employee Termination Policies—Trinitas Academy hires all employees on a will employment relationship. Both parties can terminate employment at any time for any reason. When possible, teaching staff will remain in their teaching position until the end of the school year. The goal of all parties is minimum disruption to the student's academic progress.

Staff Shortage Plan: In the event of unforeseen staff shortages, the Principal will have identified a substitute teacher plan that includes:

- An internal pool of qualified candidates cleared to teach in the State of North Carolina. This pool will undergo up to 8 hours of training within the first 6 months of joining the sub-pool.
- A relationship with one or more teacher employment agencies that can provide back-up teachers on an as-needed basis.

[1] Greenleaf, R. K. (1991). *The servant as leader*. Indianapolis, IN: Robert K. Greenleaf Center.

[2] Reichheld, F.F. (2003) *The one number you need to grow*, *Harvard Business Review*, 82 (12)

Q187.If already identified, describe the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Provide specific evidence that demonstrates the capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that (s)he has completed or is currently participating in. If no candidate has been identified, provide the job description or qualifications, and discuss the timeline, criteria, and recruiting/selection process for hiring the school leader.



Dr. Nutting has a 30-year history in the Iredell/Mooresville area. She has held positions as a classroom teacher, school Principal, as well as Assistant Superintendent in the local school district.

Dr. Boen Nutting has an extensive background in education and operations, and as an 8-year site principal at the school, we are looking to open.

Dr. Nutting has a proven track record of success as a principal, having served as the Principal of Mt. Mourne School, an IBO World School, the top-performing middle school in the Charlotte Metro Region for several consecutive years. This experience in leading a high-performing school with a focus on academic rigor and strong teacher development is directly relevant to the charter school's mission. As the Principal of a choice school, International Baccalaureate, within the Iredell Statesville School district, she uniquely knows the nuances of the campus, the needs of the local families and students, and the importance of options for teachers and families in the area.

She holds a Doctor of Education degree in Educational Administration from the University of North Carolina at Charlotte, where her dissertation focused on the knowledge, attitudes, and opinions of parents toward special education in the Piedmont region of North Carolina. This indicates her deep understanding of the educational landscape and the needs of diverse student populations.

Dr. Nutting's professional experience includes serving as an Adjunct Professor and University Supervisor in the MEd Program at Gardner-Webb University and holding various leadership roles in the Iredell-Statesville Schools district, including Assistant Superintendent, Chief of Strategic Planning and Student Services, and Director of Communications and development.

This extensive experience in school administration and strategic planning demonstrates her ability to design, launch, and manage a high-performing charter school.

Dr. Nutting's involvement in various organizations and offices, such as the Board of Directors for the Bridge of Hearts, Boys and Girls Club of Piedmont, and Iredell Health Systems, as well as her leadership roles in the Rotary, Daughters of the American Revolution, and the American Association of Suicide Prevention, further showcase her commitment to community engagement and her ability to build strong partnerships, which are crucial for the success of a charter school.

Additionally, Dr. Nutting has been recognized for her achievements, receiving numerous awards and honors, including the Top of the Lake Rotary Service Above Self Award, being named one of the 50 Most Powerful Women in the Lake Norman Region, and receiving the North Carolina Association of Scholastic Activities Principal of the Year award.

These accolades demonstrate her excellence in education and her ability to lead a high-performing charter school.

Applicant Evidence :


Boen Nutting resume updat...

Uploaded on **4/13/2024** by **Joe Higgins**



Q188.If the school leader has been identified, attach the school leader's one-page resume as Appendix O.

Upload Required File Type: pdf, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Evidence :


Boen Nutting resume updat...

Uploaded on **4/13/2024** by **Joe Higgins**

Q189.Provide a description of the relationship that will exist between the charter school employees and the school's board of directors.



The relationship between charter school employees and the school's board of directors is one of oversight, with the board working primarily through the school Principal. The board is responsible for establishing policies, goals, and expectations for the school. At the same time, the Principal is responsible for the day-to-day operations and management of the school and its staff.

The board's oversight role includes approving and monitoring the school's budget, evaluating the performance of the Principal, and ensuring compliance with all relevant laws and regulations.

The board will collaborate with the Principal to ensure clear communication and a shared understanding of the school's priorities and direction. The board will approve HR policies that impact the teachers and staff and give clear direction to the Principal on compliance and how the school's mission will be carried out.

(From Question 179) Grievances with Employees and The Board

If an employee has a grievance that cannot be resolved with the principal, the school should have a clear process for submitting the grievance to the board for review.

This process should be outlined in the school's policies and procedures, and employees should be provided with a fair and transparent mechanism for addressing their concerns.

The board should promptly review employee grievances and decide based on the case's merits. The board's decision should be communicated to the employee and the principal, and the board should work with the principal to ensure that any necessary corrective actions are taken.

Employee Grievance Appeal to Governing Board

If an employee is not satisfied with the outcome of the formal grievance process at the school level, they have the right to appeal the decision to the school's governing board.

To file an appeal, the employee must submit a written request to the board chair within 15 calendar days of receiving the final written response from the school administration. The request must include:

- The original formal grievance form
- Any relevant evidence or documentation
- An explanation of why the employee is seeking an appeal of the decision

The governing board chair will contact the employee to schedule a meeting, typically within 10 school days of receiving the written appeal. The meeting will allow the employee to present their case directly to the board.

After the meeting, the governing board will conduct a thorough and impartial grievance review.

The board will provide a final written decision to the employee, typically within 30 school days of receiving the appeal. This decision will explain the outcome and rationale.

The governing board's decision on the grievance appeal is final. The school prohibits retaliation against an employee for filing a grievance in good faith or participating in the grievance process.

Q190. Outline the board's procedures for hiring and dismissing school personnel, including conducting criminal background checks.



The Trinitas Academy Governing Board's procedures for hiring and dismissing school personnel, including conducting criminal background checks:

Hiring Procedures

The Trinitas Academy Board will establish policies that outline the hiring process and requirements for all school personnel, including teachers, administrators, and other staff.

The school Principal oversees the hiring process and ensures compliance with all relevant state laws and board policies. The following outline will guide the onboarding, background, and clearance check procedure in compliance with the State of North Carolina teacher certification requirements:

Certification Checks:

Completed or enrolled in a teacher education program and completed a bachelor's degree

Take the Praxis Core Academic Skills for Educators exam, which tests reading, writing, and math skills. A passing score is required to obtain a teaching license. Review any specific educational endorsements or additional certifications (reading specialists, special education, second language endorsements).

You can apply for a Standard Professional I teaching license through the North Carolina Department of Public Instruction and/or state reciprocity endorsements.

Background Checks:

All individuals who will work in our school facility, including teachers, must complete a criminal background check every 5 years as required by state law.

The background check includes checks of federal and state fingerprint databases, national and state sex offender registries, and the North Carolina Child Maltreatment Registry

Fingerprint Checks:

As part of the criminal background check, teachers must submit fingerprints that are electronically transmitted to the State Bureau of Investigation (SBI) for processing

If the local law enforcement agency does not have live scan fingerprinting capabilities, a fingerprint card will be provided for the applicant to submit by mail.

The charter school is required to maintain a record of any person disciplined for failing to report suspected crimes or incidents and make that record available to the Trinitas Academy governing body.

Our Principal must report to the NC DPI any certificated person who is suspected or alleged to have engaged in conduct involving minors that would be subject to reporting requirements. The Principal (working through the office manager) will maintain an up-to-date employee file for all staff of Trinitas Academy. All background, fingerprint clearance cards, and licensure requirements for staff will be reviewed annually. Our school audit will include a random review of these files, and findings will be reported to the Trinitas Governing Board.

Dismissal Procedures

Trinitas Academy Governing Board will have policies that outline the procedures for suspending, dismissing, or non-renewing the contracts of school personnel.

Teachers have the right to a hearing before the governing board prior to dismissal or suspension beyond 10 days. The board must render a decision within 10 days after the hearing. (See above grievance policy)

Resignation mid-year without governing board approval may result in disciplinary action, including the State of North Carolina DPI



notification.

Q191. Outline the school's proposed salary range and employment benefits for all levels of employment.

2024-2025

These ranges are based on the Iredell Statesville School District Salary Schedule:

Trinitas Academy is projecting the following salary ranges:

- Principal \$79,883 - \$95,860 (Trinitas budget used \$103,000)
- School Operations Manager \$31,200 to \$69,000 (Trinitas budget used \$56,000)
- Assistant Principal \$45,220 - \$66,790 (Trinitas budget used \$69,000)
- Instructional Coach \$45,000 - \$65,000 (Trinitas budget used \$69,000)
- EC Teachers \$50,000 - \$60,000 (Trinitas budget used \$69,000)
- Clerical \$35,000 - \$45,000 (Trinitas budget used \$50,000)
- Teacher Assistant \$20,000 - \$30,000 (Trinitas budget used \$24,000)
- Classroom Teachers \$37,000 - \$60,480 (Trinitas budget used \$57,000)
- Specials Teachers \$37,000 - \$60,480 (Trinitas budget used \$57,000)
- Tutor \$33,480 - \$45,100
- Custodian \$31,200 - \$44,500 (Trinitas budget used \$38,000)

Each full-time employee will receive a comprehensive healthcare plan and a retirement account with a matching employer contribution.

The Trinitas salary ranges aim to hire the best possible personnel at competitive salaries. In our budget assumptions, we went to the top of the range to allow options for hiring the most qualified staff for our school.

The Trinitas Academy budget accounts for annual increases for all employees and increases in healthcare and retirement expenses.

The following benefits will be offered to all employees:

- Ten personal/vacation days
- Medical/ Dental/ Vision/ Life Insurance
- Up to 5% retirement match

Q192. Provide the procedures for handling employee grievances and/or termination.



The Trinitas Academy Governing Board will adopt a formal employee grievance and termination policy during the planning year. The Governing Board will work with its Human Resource vendor and school attorney to ensure compliance with North Carolina employer laws and regulations. The grievance and termination process will be included in the employee handbook, which is signed by all staff during onboarding.

The policy will reflect best practices for handling employee issues and will include:

- **Informal Resolution:** Employees will first attempt to resolve any grievances informally by discussing the issue with the school Principal.
- **Formal Grievance:** If the issue cannot be resolved informally, the employee can submit a formal written grievance to the school Principal. The policy will outline the required information to be included in the grievance and the timeline for the school to respond.
- **Administrative Review:** The school Principal should review the grievance and provide the employee with a written decision, including any remedial actions to be taken. The timeline for this review should be clearly specified.
- **Appeal to the Governing Board:** If the employee is not satisfied with the administrative decision, they can appeal to the school's governing board.

Employee Grievance Appeal to Governing Board

If an employee is not satisfied with the outcome of the formal grievance process at the school level, they have the right to appeal the decision to the school's governing board.

To file an appeal, the employee must submit a written request to the board chair within 15 calendar days of receiving the final written response from the school administration. The request must include:

- The original formal grievance form
- Any relevant evidence or documentation
- An explanation of why the employee is seeking an appeal of the decision

The governing board chair will contact the employee to schedule a meeting, typically within 10 school days of receiving the written appeal. The meeting will allow the employee to present their case directly to the board.

After the meeting, the governing board will conduct a thorough and impartial grievance review.

The board will provide a final written decision to the employee, typically within 30 school days of receiving the appeal. This decision will explain the outcome and rationale.

The governing board's decision on the grievance appeal is final. The school prohibits retaliation against an employee for filing a grievance in good faith or participating in the grievance process.

The grievance policy will also outline the process for employee dismissal, including the grounds for termination and the employee's right to appeal. Employees terminated for cause will have the opportunity to appeal the decision to the governing board.

Q193. Identify any positions that will have dual responsibilities and the funding source for each position.

There are no projected dual responsibilities positions.

Q194. Describe the plans to have qualified staffing adequate for the anticipated special needs population and means for providing qualified staffing for EL and gifted students.



Staffing for Students with Special Needs:

Trinitas Academy agrees to meet the same health and safety requirements as traditional public schools, which includes having the necessary staff to serve students with special needs. This includes having qualified special education teachers, related service providers (e.g., speech therapists, occupational therapists), and other support staff to meet the needs of the anticipated special needs population. The Trinitas Academy budget details projected EC student needs based on our projected enrollment and how the services will be met through certified employees or contractors.

Once we determine our student census, we will look to recruit or contract qualified staff to service the IEPs, 504s, and English Language Learning populations. The following certifications will be required for our EC teaching staff.

Special Education Certifications:

Exceptional Children (EC): General Curriculum (K-12) - Requires passing the Pearson Foundations of Reading and General Curriculum exams, as well as a Praxis II exam specific to the special education population (e.g., Adapted Curriculum, Behaviorally/Emotionally Disabled, Learning Disabled, etc.)

English Language Learner (ELL) Certifications:

English as a Second Language (ESL) K-12 - Requires passing the Praxis II English to Speakers of Other Languages exam.

Academically or Intellectually Gifted (AIG) -

For our identified and screened gifted and talented students, the school Principal will build a protocol that encompasses the best practices, which will include:

- **Differentiated Instruction:** Teachers can differentiate the curriculum, instruction, and learning environment to meet the unique needs of gifted students. This may include providing more advanced content, allowing for faster-paced learning, and offering opportunities for deeper exploration of topics. These programs allow for more tailored instruction and curriculum.
- **Enrichment Activities:** Schools can provide extracurricular enrichment opportunities like clubs, competitions, field trips, and specialized workshops to challenge and engage gifted students.
- **Professional Development:** Ensuring teachers are trained in gifted education strategies and can identify and support the needs of gifted learners is crucial. Schools should invest in staff's ongoing professional development.

Classroom teachers will be primarily responsible for AIG students' growth and success.

Q195. Provide a narrative detailing the roles and responsibilities, qualifications, and appropriate licenses that each position must have to be hired by the school's board of directors and effectively perform the job function(s).



The Trinitas Academy Governing Board understands that they must hire staff that meet specific qualifications and licensing requirements to ensure they can effectively implement the school's mission and educational programs.

Following are the key roles and responsibilities, qualifications, and licenses required for each position:

Principal: The principal is responsible for the overall leadership and management of the charter school. They must have a valid North Carolina Principal License and at least 5 years of experience as a teacher or school administrator. Principals must also pass a criminal background check and fingerprint clearance.

Principal Education Requirements:

- Attain a bachelor's degree from an accredited college or university.
- Complete a state-approved school administration program at the master's level or above. This can be either:
 - A graduate degree from a public school administration program that meets the state's approval standards.
 - A master's degree from an accredited college or university and have completed a public school administration program that meets the state's approval standards by December 31, 1999.
- Examination Requirements:
 - Pass the exam adopted by the State Board of Education.

Vice Principal: The vice principal assists the principal in managing the school's day-to-day operations. They must have a valid North Carolina Principal or Assistant Principal License and at least 3 years of teaching or administrative experience. Vice principals also require a background check and fingerprint clearance.

Office Manager: The office manager oversees the school's administrative functions, including student records, enrollment, and communication. They must have a high school diploma or equivalent (a college degree is preferred), strong organizational and communication skills, and pass a background check.

Nurse: The school nurse provides healthcare services to students. They must be a registered nurse (RN) or MA licensed in North Carolina and have experience working with children. MA candidates must have extensive experience working with children at our school's age levels. Nurses also need a background check and fingerprint clearance.

Teacher: Teachers are responsible for delivering instruction and supporting student learning. They must have a valid North Carolina teaching license in their subject area, except that up to 50% of teachers can be unlicensed. We would require unlicensed teachers to have prior work experience in a field comparable to the subject area they will be teaching. All teachers must pass a criminal background check and fingerprint clearance.

Special Education Teacher: Special education teachers provide individualized instruction and support for students with disabilities. They must have a valid North Carolina teaching license in special education. Special education teachers also require a background check and fingerprint clearance.

English Language Learner (ELL) Teacher: ELL teachers work with students who are learning English as a second language. They must have a valid North Carolina teaching license with an ELL or ESL endorsement and pass a background check and fingerprint clearance.

Custodian: Custodians maintain the cleanliness and upkeep of the school facilities. They must have a high school diploma or equivalent and relevant experience. Custodians require a background check and fingerprint clearance.

Teacher Aides: Teacher aides provide instructional and administrative support to teachers. They must have a high school diploma or equivalent and pass a background check and fingerprint clearance.

Coaches: Coaches are responsible for leading extracurricular athletic programs. They must have relevant coaching experience and a background check but do not require a teaching license.

11.4. Staff Evaluations and Professional Development



Q196. Identify the positions responsible for maintaining teacher license requirements and professional development.

The office manager will ensure compliance with teacher license requirements during the hiring process. The office manager must verify that candidates meet the necessary education, certification, and licensing requirements for the position before extending an offer of employment.

Once hired, the human resources department or office manager is responsible for the ongoing compliance with teacher license and fingerprint requirements. They must monitor the expiration dates of licenses and fingerprint clearance cards and ensure teachers renew them in a timely manner.

A dedicated professional development staff member or team will handle teacher professional development. This person is responsible for identifying teachers' training and development needs and providing them with continuous learning opportunities to increase their knowledge and skills. (Detailed in Q197-200)

The professional development staff member works closely with the human resources department to ensure teachers receive the training needed to meet their job responsibilities and maintain their licenses.

Q197. Provide a detailed plan noting how the school will mentor, retain and evaluate staff in a format that matches the school's mission and educational program. The plan should also describe how the school will meet the teacher certification and licensure requirements for teachers as prescribed by state and federal law. Be sure this overview matches with the projected staff and funding of the proposed budget section.



Tracking and Monitoring Teacher Performance:

Trinitas Academy will implement the LoTi Teacher Evaluation System (Levels of Teaching Innovation), teacher evaluation, and student engagement system. Through pop-in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allows the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable, allowing the Trinitas Academy admin to identify issues and take corrective actions. A target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

LoTi delivers consistency in teacher training, curriculum implementation, and classroom observations, which becomes critical. These scoring metrics are consistent and measurable, allowing the site Administration to identify issues and invest in additional training, one-on-one coaching, or corrective actions.

Dr. Chris Moersch designed LoTi to assess the most critical aspect of a scholar's education, a great teacher in the classroom. Dr. Moersch is the author of *Beyond Hardware: Using Existing Technology to Promote Higher Level Thinking*. Dr. Moersch has developed his program using the Danielson Rubric model, which also incorporates a student engagement component known as H.E.A.T. (Higher order thinking, Engaged learning, Authentic connections).

H.E.A.T is used as a lens to go beyond the lesson plan to what is happening with students. The activities the teacher plans often do not produce the expected output from students. H.E.A.T. provides a common language to discuss and measure student output in a way tied to evidence-based practices.

LoTi involves teacher drop-in observations and real-time and engaging feedback from the PD. These tools and the feedback systems ensure that the teacher, Principal and PD team are speaking a common language about what is expected and what quality instruction looks like at the school. LoTi builds a map for teachers, coaches, and leaders to create successful collaborative learning environments. The LoTi program helps refine a teacher's skills and ensures a program of instruction is followed and delivered at a high level.

School Principal - Governing Board Oversight

The governing board's responsibility is hiring, supporting, and, if necessary, the Principal. The Principal is charged with the day to handle school functions. The school's Principal's primary focus is on the academic and cultural effectiveness of the school. By reviewing several performance data points, the governing board can determine if the Superintendent is achieving their leadership objectives. Some of the data points the governing board will be reviewing quarterly include:

- The Governing Board's evaluation of the Principal
- Student benchmark assessments (NWEA-MAP)
- End of year NC State Exams
- Teacher turnover and exit interviews
- Net Promoter Score (NPS) data
- LoTi teacher evaluation pop-in scores
- PTO feedback (reported to the board annually)
- Enrollment targets established by the Governing Board
- Academic growth – including cohorts, ELL, and Special Needs populations
- Community involvement and impact narratives

The LoTi evaluation data will be cross-referenced with the school and teachers' NWEA-MAP assessment data, the teacher's individual plans to address the NWEA-MAP assessment data, and backward-looking end-of-year NC state assessment results to determine teacher effectiveness and the professional development schedule. Using these data points, the site Principal (with Governing Board Academic Committee input) can triangulate individual teacher issues or global trends with our school's academic mission.



Applicant Evidence :


Loti - Teacher Evaluation - T...

Uploaded on **4/15/2024** by **Joe Higgins**

Q198. Describe the core components of the professional development plan and how these components will support the 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 core components of our school's professional development plan are detailed in several of the questions we covered in section 11.4. The themes and overarching goals outlined include:

Curriculum and Testing:

We believe providing teachers with in-depth lesson materials and a comprehensive curriculum allows them to focus more on adapting the lessons to their student's needs rather than just what to teach. We provide the what and allow the teachers to focus on the how. Our partnership with Ethos Logos Partners provides a detailed curriculum plan for teachers to use as a resource. The curriculum was designed in private and public charter schools specializing in the Classical Education model. The way the curriculum is provided to the teachers allows them ultimate flexibility. The teacher remains responsible for aligning their lessons to North Carolina academic standards. We aim to strike a balance between the powerful use of academic data and creativity and impact in the classroom. Nationalized assessment programs like NWEA-MAP will help tailor our teacher's differentiation, curriculum modifications, and administrative oversight.

Focused Collaboration – Using Opportunity Culture.org as a template:

We will be dedicating significant time for teachers to collaborate across departments (middle school) and grade levels to solve specific problems, with the support of instructional experts like coaches and principals. This allows for more meaningful, goal-oriented collaboration.

Continuous Feedback – Using pop-in observations and the LoTi framework:

Our school will implement the LoTi system, which requires frequent check-ins and feedback between teachers and content experts rather than just an annual performance review. The LoTi framework will be explained during initial teacher training and provides clear expectations of what great Classical Education teaching looks like. This empowers teachers to improve their instruction continuously.

Clear Instructional Practices with our comprehensive PD schedule:

Ongoing PD opportunities will ensure teachers are trained to effectively implement the mission, including academic rigor, civic responsibility, and character formation.

Our school aims to manage the professional development activities internally with occasional national-level speakers, curriculum publisher professional development staff, and potential surrounding district opportunities that become available.

Q199. Provide a schedule and explanation of professional development that will take place prior to the 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.



Summer Prior to Opening of School

Trinitas Academy leadership will host a 15-day orientation and in-service training program for teachers and other staff to kick off the Classical pedagogy program. Teachers will work individually, in teams according to grade level, and with a group of teachers to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards.

The start-up budget reflects the cost of paying teachers for the new teacher orientation.

After year 1, the teacher contracts will include at least 5 summer in-service days. A dual-track for new and returning teachers (after the first year) will be created to address both needs.

Five-Day Orientation – New School and or New Teacher

After the launch year, Trinitas Academy will host a five-day orientation and in-service training program for our teachers and other staff in July each year (costs included in the annual budget). Teachers will work individually and in teams according to grade level, as well as with a group of teachers to align the curriculum, assessments, and standards across grade levels so that they teach a rich, coherent curriculum tied to state standards. The orientation will address the following topics:

- About Trinitas Academy
 - Mission, vision, and core values
 - How mission, vision, and core values impact teachers and scholars every day
 - Classical education
 - Classroom environment in a Classical/Charlotte Mason School
- Academics & Teaching
 - North Carolina Academic Standards EOA
 - Academic Excellence in a Classical School
 - Planning and preparation strategies
 - Lesson implementation with outcomes aligned to standards
 - Best teaching practices
 - Curriculum resources, usage, and supplementation
 - Using Schoology LMS
 - Curriculum maps and pacing
 - LoTi Teacher Pop In Observation – What is Expected
- NWEA – MAP Testing System
 - Accessing MAP reports
 - Interpreting and implementing MAP results in the classroom
 - The Trinitas Academy 8 Step plan for data analysis
 - Role of the AAC (Academic Oversight Committee)
- Assessments & Instruction
 - Scholar assessment data
 - Types of assessments – Exit Tickets – Grading Strategy
 - Benchmark Assessment (NWEA-MAP)
 - Instructional decision-making based on data
 - Setting goals concerning student learning and the standards
 - Developing and implementing action plans
 - Establishing objectives related to standards
 - Differentiated instruction
 - Instructional material/resources for differentiated instruction
 - Strategies for Gifted and Talented
 - ELL best practices in the traditional classroom

In addition to the five-day orientation and in-service, teachers will attend professional development sessions throughout the year focused on North Carolina Standards, differentiation, and Classical Education.



Q200. 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.



Year-Round Teacher Training and Evaluation

Early Release Days - Weekly, In Service, Early Release PD

Once per week, at the campus, students are dismissed early, and schools hold professional development workshops targeted toward improving school-wide practice. Workshops deliberately build key skills across practical, relevant topics such as culture, instruction, analysis of student work, and curriculum. A sample schedule will be produced for the entire semester, and adjustments will be made to the PD course programming based on specific needs observed in the classrooms. Our calendar and minutes of instruction accommodate the early release PD schedule.

The school's first years will focus on quality instruction, understanding the curriculum resources, and beginning Classical Education-based training sessions (Socratic seminar, picture studies, integrating the arts into instruction, nature study, copybook, recitations, the Why of Latin, etc.).

In the coming years, the principal will review the school's areas of weakness and tailor the weekly in-service PD courses to address those needing attention.

Classical Education – Online Teacher Training Program.

Over 75 Professional Development courses have been developed in the Schoology Learning Management System. These courses range from particular tools and nuances of Classical Education, Charlotte Mason's philosophies, to practical examples of real-world teacher challenges in Classical Education. The PD Course offerings intentionally introduce new staff members to basic aspects of our culture and expectations. Once on board, the PD Course offering trains a teacher on a theory or practical aspect of their profession. The Trinitas Academy PD department will observe an issue or coachable moment, assign the corresponding Virtual PD mini-course to the teacher, and follow up to ensure understanding and implementation. A sampling of the courses offered includes:

- Relating with Parents
- Relational Discipline Strategies (Dr. Druikers and Dr. Glasser)
- Narration and Recitation at various grade levels
- Socratic Instruction - Intro, Level 1 and Level 2
- Classroom Management
- Understanding Classical Curriculum Resources
- Data interpretation and grouping
- Differentiation in the classroom

Staff will have an opportunity to progress in their careers at Trinitas Academy by attending in-person Professional Development classes and achieving mastery through various observations, one-on-one coaching, and mentorship.

Master Teacher Program – Beginning in Year 2 -OpportunityCulture.org –

In year two of operations, Trinitas Academy intends to implement the Master Teacher program outlined in **OpportunityCulture.org**.

The Opportunity Culture initiative, led by Public Impact, is a teacher leadership model funded in part by the Bill & Melinda Gates Foundation that enables excellent teachers to reach more students. The key aspects of the Opportunity Culture program are:

- Multi-Classroom Leaders (MCLs): Highly effective teachers who lead a team of teachers and are responsible for all students' learning outcomes. MCLs receive additional compensation, typically up to \$23,000, by reallocating funds from vacant teacher positions and other sources.
- Extending the reach of excellent teachers: The Opportunity Culture model allows great teachers to reach more students than they could in a traditional classroom, increasing equitable access to excellent teaching, especially for disadvantaged students.
- Ongoing professional development and support: MCLs provide instructional guidance, coaching, and support to the teachers on their team to help them continuously improve their practice.[1]



As of 2023, the Opportunity Culture initiative has been implemented in over 150 schools across 22 sites in the United States.

The driving mission of the Trinitas Master Teacher Program will be to keep great teachers in the classroom but allow them to mentor other teachers at their grade level or at their school. The Trinitas Master Teachers are paid an additional stipend and have a lighter teaching load. Each grade level has a Master Teacher whose responsibility it is to mentor their team, disseminate information, analyze and correct teaching techniques, and integrate the data-driven instruction protocols identified by the Administration and Professional Development staff.

Trinitas Academy intends to write grants starting in years two and three to expand the OpportunityCulture.org program. The best teachers, mentoring, and instructing at the highest level are the goals of the OpportunityCulture.org system.

[1] <https://www.opportunityculture.org/who-we-are/>

11.5. Marketing, Recruitment, and Enrollment

Reaching the full capacity for enrollment will be critical to obtaining 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 115C-218.45 carefully.

Q201. 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)).



Our racial/ethnic and economic makeup of the school is projected to be:

- Black or African American – 9%
- Hispanic – 7%
- Economically Disadvantaged 33%

To market the charter school in a way that reasonably reflects the racial/ethnic and demographic composition of the Trinitas team, focus on the following strategies:

Leverage community outreach and partnerships: Our Governing Board and Principal have strong relationships with community organizations, religious institutions, and local businesses that serve the target demographic groups. Participate in community events and leverage these partnerships to spread awareness about the school and its offerings.

The following community organizations have been contacted and presented to during the application process. They will be one of our foundations for marketing the school as we go forward:

- **United Way** Brett Eckerman Executive Director—Iredell—Principal Dr. Nutting has a long-standing relationship with the organization and will explore options to assist in our school's enrollment.
- **The Cove Church** - Josh Carosella – Youth Pastor The Cove Church in Mooresville, North Carolina serves about 5,000 people in total on a regular Sunday, with attendance swelling to nearly 10,000 for Christmas and Easter. The Cove is less than a mile from the Mt. Mourne campus and working with the Cove team will help to inform members of the church about our model.
- **Patrick's Episcopal Church** – Fr. Greg McIntyre – St. Patrick's is near the Mt. Mourne campus, and they have agreed to volunteer, assist, and support our school's efforts. The church has a pre-school and will help us communicate with those families.
- **Fairview United Methodist Church** – Pastor Nathan Finsel – They are happy to volunteer, share resources, and help market our school. The church has Bee Hive PreK on its property, and they have aided our marketing efforts. Fairview is directly across the street from the Mt. Mourne campus.
- **Community PreSchool of Huntersville** Kyshia Lineberger—Our board has met with their preschool team, and we toured each other's campuses. The community has over 175 preschoolers with whom we are looking to partner. We have agreed to cross-promote each other's schools as they are complementary and philosophically aligned.
- **Ambassador Classical High School** – This Classical Education high school is in our trade area. Our team has been in ongoing discussions with the Ambassador leadership team about ideas and ways to cross-market and support each other's efforts. Given that both models are Classical Education focused, there is a natural synergy for our families. With the North Carolina voucher Opportunity Scholarships in place, this option may be available to some of our families.
- **Athletics** – Our team has met with a number of area athletic clubs and groups. Each is interested in partnering with our school, possibly sharing resources (gymnasium, fields etc.).
- **Pre-Schools** We have identified over 20 pre-schools within a 6-mile radius of the Mt. Mourne campus. Our group has made contact with some, but there are many more to connect with. Part of our outreach plan will be to visit and introduce our school to the center directors and explore options for holding private tours for families or marketing to these schools.

Utilize targeted digital marketing: We have started developing a strong online presence through the school's website and social media channels. We will ensure all digital content is mobile-friendly and available in multiple languages to cater to the diverse target audience. Our group is working with an advertising agency with extensive experience in targeted digital advertising on platforms like Facebook and Instagram to reach prospective families.

Ensure accessibility and inclusiveness: We plan to make the application and enrollment process accessible, provide transportation assistance, and create a welcoming and inclusive environment for economically disadvantaged families to encourage their participation. This will include one on one support for families that request enrollment support.

Highlight the school's unique value proposition: All of our marketing and outreach will emphasize Trinitas Academy's character focus, specialized curriculum, and extracurricular activities that cater to the needs of the target student population. Our marketing images and content will showcase the school's diversity, inclusiveness, and the positive impact it has had on students and the community.

Provide resources and support for families: As we build out our services, we understand each family's needs are different and will do our best to address an inclusive student population. This included offering resources such as bilingual staff, assistance for families experiencing homelessness, and partnerships with community organizations to demonstrate the school's commitment to



supporting the diverse needs of its students and families. We are making provisions in our operations and budget for lunch services for those families that can't afford meals, busing and transportation, and before and after school options for working families.

Q202. Describe how parents and other members of the community will be informed about the school.



Community Outreach and Engagement:

Conduct school tours and open houses to allow parents and community members to visit the school, meet the staff, and learn about the educational program. These open houses will be held at least twice per month. As families enroll and our marketing efforts expand our school's message, we anticipate greater interest in our model. Since we have full access to the Mt. Mourne school campus, these open houses will be able to accommodate small and large groups. During our charter drafting process, we've held open houses for prospective families and alumni of the 75-year-old Mt. Mourne school.

Hold one-on-one meetings with local community leaders, organizations, and preschools to build partnerships and spread awareness about the new charter school. This effort has already begun, and with the strong presence of the Governing Board in the local area, there have been numerous discussions with elected officials, non-profit organizations, churches, pre-schools, and prospective families.

Engage and Organize our current families – Our early marketing efforts have built a list of +/- 250 students and families interested in enrolling in our school. These families regularly communicate about our school and the application process for charter school approval. Beginning in the fall of 2024, our Principal will start organizing informal meet-ups for our new families. The goal will be to work towards our mission of partnering with parents and to create strong relationships early in our school start-up. These families will be asked to bring friends and continue our outreach efforts. Word of mouth and personal recommendations are the most effective form of marketing and outreach possible.

Collaborate with community partners to host informational events, workshops, and activities introducing the school to families. Here is a list of events our Principal has identified and our school intends to have a presence at during the planning year:

- The Mooresville Day Festival is an annual hometown festival that showcases local art, food, and entertainment. It features an open-air artisan market, food trucks, live performances, music, and activities. The festival takes place on the last Saturday in April in downtown Mooresville.
- Downtown Mooresville also hosts the "Uncorked & Artsy" event, a spring celebration of the arts featuring over 40 artists, live painting demos, wine and craft beer tastings, live music, and more. This event is held in early April.
- The annual Cornelius PARC Fest is a popular community event featuring live music, food trucks, craft vendors, kids' activities, and more. It takes place in September.
- Huntersville is home to the annual Huntersville Summerfest, a family-friendly festival with live music, food, arts and crafts vendors, and children's activities. This event is held in June.

Homeschool Outreach and Inclusion:

- Developing partnerships with local organizations that serve homeschool families, such as the church-based MOPS Clubs or homeschool pods, to spread the word about our school's intent to connect the homeschool community to our campus.
- By adding the homeschool community to our campus, the goal is to share a curriculum scope and sequence that allows the homeschool families to 'follow along' and use our school and teachers as a resource to manage their homeschool experience better. We will emphasize our school's focus on moral character development, civic virtue, and a well-rounded education with academic opportunities, arts, and extracurriculars - aspects that may appeal to homeschool families. Once our relationship is established, these homeschooled families may become enrolled students.
- Highlighting the classical charter's tuition-free public school status can make it an attractive option for homeschool families looking for a rigorous academic program without the cost of private school.

The following are some of the identified homeschool groups in the vicinity of the school. We will contact these groups to explain our Classical Education model and the Charlotte Mason-influenced educational model. There are numerous education models for homeschooling families to choose from. (Traditional, Montessori, Waldorf, Unit Studies, etc.), but Classical Education and Charlotte Mason are always strong choices. By assisting these families, our team feels we can provide an environment that assists in these families' success. Following are some of the identified homeschool groups in the vicinity of the school:

Mooresville:

- Visions of the Future Homeschool Group - a non-secular group open to all members of the communities of Mooresville, Mt. Ulla, Davidson, Cornelius, and Huntersville.
- The Future Fashion Designers - a club that meets in Mooresville and offers classes, workshops, and summer camps.



Mooresville Area Homeschoolers (Facebook Group)

Davidson:

- Visions of the Future Homeschool Group - a non-secular group open to all members of the communities of Mooresville, Mt. Ulla, Davidson, Cornelius, and Huntersville.
- Creative Learning Center - a collaborative learning environment where students pursue independent studies and creative pursuits.
- Level Up Fitness - offers classes and field trips for homeschool groups at group rates.

Huntersville:

- Visions of the Future Homeschool Group - a non-secular group open to all members of the communities of Mooresville, Mt. Ulla, Davidson, Cornelius, and Huntersville.
- WINGS (Wise Instructors Need Group Support) - provides support and encouragement to homeschool parents, primarily in the University and Lake Norman areas.

Other regional homeschool groups:

- Cabarrus County Homeschoolers - A nondenominational Christian support group in North Carolina designed to provide information to families in the Cabarrus County area who are interested in homeschooling and to provide information to our support group members.
- Mothers of Preschoolers (MOPS) group at Mooresville First Presbyterian Church, A homeschool group that is part of the Biltmore Church in the Lake Norman area, and MOPS Lake Norman Baptist Church.
- Ace Homeschool Association is a homeschool support group serving Catawba County, North Carolina, and surrounding areas. Our ideals - to represent the homeschool community, to provide a positive socialization environment for homeschooled children, to support and encourage parents in the homeschooling process while providing an atmosphere for the exchange of teaching techniques and curriculum information, to keep the group informed of any homeschool current events and information through yahoo group emails; and to provide public awareness of home education; diligence in moral and ethical instruction, educational excellence; and responsible citizenship.
- Pathways for Learning - Offers Homeschool Group Activities.
- The Homeschool Room (Huntersville) is an educational consignment store created by and for homeschoolers since 2002. Two Charlotte area locations are owned and operated by a local homeschool family.
- Lake Norman Homeschoolers - Lake Norman Homeschoolers is an activity group that supports secular Social events, Educational field trips, and Class offerings in the Lake Norman area. This all-inclusive homeschooling group supports people who have chosen to educate their families at home.
- Living Hope Homeschool Family Co-op—This is a group of lifelong learners committed to the next generation's education. It is a faith-based family that has decided to work together to expand the opportunities available to our children.

In addition to tours, community outreach, one-on-one tours, and events, the Trinitas Academy marketing plans will include the following:

Marketing and Communications:

- We aim to build a robust social media campaign across platforms like Facebook, Twitter, and Instagram to share updates, highlight the school's mission and offerings, and engage with prospective families. This effort has already started and will expand during the planning year.
- Our Governing Board has contacts and relationships with local media. We have appeared in local newsprint, and board members have been interviewed on local radio. This effort will continue crafting press releases to local media outlets about our school, its educational approach, and enrollment opportunities—pitch stories to local newspapers, TV stations, and radio programs for interviews and coverage.
- Create informative marketing materials, such as brochures, flyers, and videos, explaining charter schools, how they differ from traditional public schools, and their unique benefits. Distribute these through community centers, libraries, and other high-traffic areas.

Q203. Describe your plan to recruit students during the planning year, including the strategies, activities, events,



and responsible parties. Include a timeline and plan for student recruitment/engagement and enrollment, with benchmarks that will indicate and demonstrate suitable recruitment and enrollment practices over time.



Plan For Community Outreach One Year Prior to Open: Our staff will start with the interest list of students, update them on the enrollment process, and look to build a group of early supporters to the school.

Partnering with parents is part of the Mission Statement of Trinitas Academy, and engaging with families has already begun. It will ramp up after approval of the charter and the set of the opening date (August 2025).

Beginning in September of 2024, through the school opening, the objective of the Principal, Governing Board, and early hired staff will be to implement a program to engage the community in the new school. Our strategic plan for enrollment includes an aggressive budget of \$50,000 for traditional marketing and advertising. The effectiveness of this effort will be a series of 'call to action' events and open houses held at local community spaces to present the school model, answer questions, and begin the enrollment process. The Principal has launched schools in the Iredell area and uniquely understands the process of gaining traction, telling the school's stories, and finding early adopters to help with outreach efforts.

During the year-long enrollment and marketing period, all efforts will be tailored towards;

1. Listening to the community and addressing any unforeseen needs.
2. Engaging the families, businesses, and civic organizations/churches in spreading the word of the school.
3. Special focus will be placed on area preschools, homeschool groups, and churches.

From prior experience, the initial focus will be on finding and building relationships with early adopter parents that can help organize and extend the reach of the school leadership team. This early parent team will become the beginning PTA and has proven invaluable in organizing volunteers and understanding the pulse of the local parent community.

The team will look to set up tables or events at the area Preschools, and at high traffic businesses and at local community events that are occurring in the target areas. Presentations at MOPS Clubs (church/homeschool clubs), youth athletics teams, and area Boy and Girl Scouts will be part of the early outreach. The outreach will include setting up tables at libraries, supermarkets, churches, and youth sports events.

Meetings with and outreach to - local Head Starts, Day Cares, Pre-K, and Clubs programs: The Principal and leadership team are currently establishing relationships with local Head Start, daycare, and PreK programs. Presentations at local daycare centers, Head Start clubs, and private preschools will all help build the demand for the new school. The team has met with the executive directors of the target area, and each has unique ways to engage their parents. Many of these programs have after-school services and will pick up scholars at Trinitas Academy, and they were very interested in partnering with our school. The Principal has identified several tutoring, music, karate, and special needs vendors in the local area, and many have expressed interest in partnering with the school.

Social Media: All events will be publicized on social media and via email. A consistent social media campaign has been budgeted for and will be the hallmark of our communication efforts. Beginning in September of 2024, the team will post event updates, school hiring, and construction progress on social media at least once per week, surveys asking families for feedback, and monitoring community questions. The social media program will be effective if it is a blend of organic activity and paid boosting of ads. We have started building our social media presence during the application process. This foundational work will expand as we move towards the opening.

The Marketing Campaign (detailed in Student Recruitment and Enrollment) will produce digital and print messages in English and Spanish to reach all families. The plan has a budget of \$50,000 and covers print, radio, outdoor, and social media.

School Open Houses: Starting in September/Oct of 2024, the leadership team will host two monthly open houses. All marketing efforts will communicate these events; we have found them to be great ways to meet prospective parents and answer their questions. These events will be scheduled at a time convenient to you. Each event will have handouts of Frequently Asked Questions and materials where families can raise questions or offer feedback on our plan.

Connecting with Families: The success of our school will be directly related to the power of relationships. Under the Culture section, we detail the foundational philosophies of Adlerian psychologists Dr. Dreikers and Dr. Glasser. In keeping with the idea of relationship building, all our events and interactions with parents will focus on getting to know their families' stories, dreams, and struggles. Once enrolled and opened, we will meet children at the door each morning and meet the parents at their care each



afternoon during pick-up. Meet the Teacher nights will occur very early in the year, and the teacher will make a phone call home within the first month. All these efforts fit our mission and aim to build solid relationships with families.

Applicant Evidence :


Application Marketing Samp...

Uploaded on **4/15/2024** by **Joe Higgins**

Q204. Describe how students will be given an equal opportunity to attend the school. Specifically, describe any plans for outreach to: families in poverty, academically low-achieving students, students with disabilities, English learners, and other students at-risk of academic failure. If your school has a specific area of focus, describe the plan to market that focus.

This question is similarly detailed in Q201.

The school website will include approved language from the North Carolina DPI to ensure compliance with at-risk populations. The enrollment process will not include questions regarding race, ethnicity, EC participation, or economic status. Once enrolled, our school will screen for any of the listed special populations and ensure we are addressing their particular families' unique needs.

Ensure accessibility and inclusiveness: We plan to make the application and enrollment process accessible, provide transportation assistance, and create a welcoming and inclusive environment for economically disadvantaged families to encourage their participation. This will include one on one support for families that request enrollment support.

Homeschool Inclusion: Our specific area of focus is inclusion within the homeschool community. An estimated 179,900 students are in homeschooled environments. The movement is Growing. Currently, 9.6% of students are enrolled as homeschoolers. There has been a 52% growth in homeschooling from 87,978 to 179,900 over the past 10 years (NC Dept of Admin). This data was assembled and presented at our community outreach sessions.

- 179,900 – 9.6% Homeschooled. **Growing. 52%** growth from 87,978 to 179,900 over 10 years (NC Dept of Admin)
- 126,768 – 6.8% Private schools. **Growing. 25%** growth from 95,768 to 126,768 over 10 years - (NC DOA)
- 151,485 - 8.1% Charter schools. **68%** growth from 48,795 to 151,485 over 10 years – to 2023. **Growing.**
- 1,397,273 Traditional public schools. **4%** decline from 1,443,998 to 1,397,273 over 10 years **Declining.**
- **1,855, 426 Total Statewide Student Population**

Applicant Evidence :


Rotary Community Presneti...

Uploaded on **4/15/2024** by **Joe Higgins**

Q205. What established community organizations would you target for marketing and recruitment?



Following is a list of community partnerships that the Trinitas Academy Principal and Governing Board members have established relationships with for marketing and recruitment efforts:

Leverage community outreach and partnerships: Our Governing Board and Principal have strong relationships with community organizations, religious institutions, and local businesses that serve the target demographic groups. Participate in community events and leverage these partnerships to spread awareness about the school and its offerings.

The following community organizations have been contacted and presented to during the application process. They will be one of our foundations for marketing the school as we go forward:

- **United Way** Brett Eckerman Executive Director—Iredell—Principal Dr. Nutting has a long-standing relationship with the organization and will explore options to assist in our school's enrollment.
- **The Cove Church** - Josh Carosella - Youth Pastor The Cove Church in Mooresville, North Carolina serves about 5,000 people in total on a regular Sunday, with attendance swelling to nearly 10,000 for Christmas and Easter. The Cove is less than a mile from the Mt. Mourne campus and working with the Cove team will help to inform members of the church about our model.
- **Patrick's Episcopal Church** - Fr. Greg McIntyre - St. Patrick's is near the Mt. Mourne campus, and they have agreed to volunteer, assist, and support our school's efforts. The church has a pre-school and will help us communicate with those families.
- **Fairview United Methodist Church** - Pastor Nathan Finsel - They are happy to volunteer, share resources, and help market our school. The church has Bee Hive PreK on its property, and they have aided our marketing efforts. Fairview is directly across the street from the Mt. Mourne campus.
- **Community PreSchool of Huntersville** Kyshia Lineberger—Our board has met with their preschool team, and we toured each other's campuses. The community has over 175 preschoolers with whom we are looking to partner. We have agreed to cross-promote each other's schools as they are complementary and philosophically aligned.
- **Ambassador Classical High School** - This Classical Education high school is in our trade area. Our team has been in ongoing discussions with the Ambassador leadership team about ideas and ways to cross-market and support each other's efforts. Given that both models are Classical Education focused, there is a natural synergy for our families. With the North Carolina voucher Opportunity Scholarships in place, this option may be available to some of our families.
- **Athletics** - Our team has met with a number of area athletic clubs and groups. Each is interested in partnering with our school, possibly sharing resources (gymnasium, fields etc.).
- **Pre-Schools** We have identified over 20 pre-schools within a 6-mile radius of the Mt. Mourne campus. Our group has made contact with some, but there are many more to connect with. Part of our outreach plan will be to visit and introduce our school to the center directors and explore options for holding private tours for families or marketing to these schools.

11.6. Parent and Community Involvement

Q206. Describe how you will communicate with and engage parents and community members from the time that the school is approved through opening.



Engage and Organize our current families – Our early marketing efforts have built a list of +/- 250 students and families interested in enrolling in our school. These families are regularly communicating about our school and the application process for charter school approval. Beginning in the fall of 2024, our Principal will start organizing informal meet-ups for our new families. The goal will be to work towards our mission of partnering with parents and to create strong relationships early in our school start-up. These families will be asked to bring friends and continue our outreach efforts. Word of mouth and personal recommendations are the most effective form of marketing and outreach possible.

School Open Houses: Starting in September/October of 2024, the leadership team will host two monthly open houses. All marketing efforts will communicate these events; we have found them great ways to meet prospective parents and answer their questions. These events will be scheduled at a time convenient to you. Each event will have handouts of Frequently Asked Questions and materials where families can raise questions or offer feedback on our plan.

Conduct school tours and open houses to allow parents and community members to visit the school, meet the staff, and learn about the educational program. These open houses will be held at least twice per month. As families enroll and our marketing efforts expand our school's message, we anticipate greater interest in our model. Since we have full access to the Mt. Mourne school campus, these open houses will be able to accommodate small and large groups. During our charter drafting process, we've held open houses for prospective families and alumni of the 75-year-old Mt. Mourne school.

Connecting with Families: The success of our school will be directly related to the power of relationships. Under the Culture section details the foundational philosophies of Adlerian psychologists Dr. Dreikers and Dr. Glasser. In keeping with the idea of relationship building, all our events and interactions with parents will focus on getting to know their families' stories, dreams, and struggles. Once enrolled and opened, we will meet children at the door each morning and meet the parents at their care each afternoon during pick-up. Meet the Teacher nights will occur very early in the year, and a phone call home will be by the teacher within the first month. All these efforts fit our mission and aim to build solid relationships with families.

Q207. 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.



Parent Involvement – The Hallmark of Trinitas Classical Academy

One of the key principles that Trinitas Academy leaders hold as a foundation is that parental involvement is essential in maximizing the scholar’s educational experience. Our mission speaks to it, and partnering with parents is part of our goals for the school.

We partner with parents. High academic results cannot be achieved without parental support. We are a school of choice, and parents are committed to playing a strong role in their students's education by seeking us out. The school expects parents to be directly involved in the school's culture and the children's academic success.

In operation, partnering with parents takes on some different aspects. Below are specifics of what we expect from our Administration, Teachers, and Parents as part of the Trinitas Academy school;

Volunteer Opportunities on Campus

- Lunch monitor or support
- Service on PTO Board
- Sub-Committee Service at Governing Board Request
- Before and After Care support
- Tutoring
- Coach – assistant coach

Commitment To Support School At Home

- Our curriculum platform was designed to allow parents to easily follow along with classroom subjects, including outlines for all major courses.
- Students are assigned age-appropriate homework weekly. We believe family time is important and aim to limit our homework time to 10 minutes per grade up to 60 minutes max.
- We will ask teachers to avoid tests on Mondays because family time is important, and weekends are family time.

Q208. If already identified, describe any programs you will offer to parents and/or the community and how they may benefit students and support the school mission and vision.



The Trintias Academy House System

The proposed House System is inspired by the ideals of republican (representative governance) participation, shared leadership, and civil service. Our leadership has experience with building a House System, which we look to incorporate in year 2 or 3, depending on enrollment.

Specifically, the Trinitas House System exists for three purposes:

1. To allow students a system where they can belong, collaborate, and serve.
2. To allow families an organizing structure to build community, celebrate learning, and give back to their local school.
3. To sponsor school events and other school needs with the creativity, energy, and leadership of our family volunteers in each grade level.

Similar to how the Trinitas Academy curriculum is organized by historical time period following a 4-year cycle, scholars in each grade level will belong to a House (called by the Latin "Domus") in partnership with the other grade level that is studying the same period in history each year they are studying. This alignment between history themes will connect 1st and 5th grades, 2nd and 6th, and so on.

House Service Projects

Campus Beautification: Each house will adopt the school campus for 1 month each semester to help pull weeds, pick up trash where needed, donate minor landscaping projects, etc.

- **Whole school:** July, before we begin each new school year
- **Domus Fortudinis:** September, February
- **Domus Gratitudeinis:** October, March
- **Domus Veritis:** November, April
- **Domus Justitiae:** January, May

House Lead Community Events

The following events will occur in the first year of school and each year thereafter. Additional events and team-building opportunities can be added to this list, but these events are part of the campus principal's job responsibility. The House Captains typically take on the planning and organization of these events.

- Fall Festival (September)
- Grandparents Day (November)
- Sweetheart Dance (February)
- Math and Science Day (April)

Events are fundraising opportunities but, more importantly, a time to gather as a community and create connections.

8th Grade Trip To Washington DC

Beginning in our school's third year of operations, we will begin an annual 8th-grade Washington DC trip. We will look for volunteers to organize the trip and have identified tour groups that manage all aspects of the week-long trip. Students and families will fundraise for the event, and donation dollars will be available to families needing financial assistance.

Applicant Evidence :



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Uploaded on **4/15/2024** by **Joe Higgins**



11.7. Admissions Policy

Q209. Weighted Lottery Does your school plan to use a weighted lottery? The State Board of Education may approve an applicant's request to utilize a special weighted, or otherwise limited, lottery in certain circumstances. If the charter applicant wishes to deviate in any way from the open lottery normally utilized by charter schools, the following requirements must be met:

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

- Yes
- No

Q213. Provide the school's proposed policies and the procedures for admitting students to the proposed charter school, including:

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



Admission Protocols and Procedures

Framework for Trinitas Classical Academy Enrollment Process (Pending final Governing Board Approval – In compliance with the most up-to-date NC DPI directives). Attached

When recruiting students, Trinitas Academy will target all segments of the parent community. Our school will recruit in a manner that does not discriminate against students of a particular race, color, national origin (including English language learners), religion, or sex or against students with disabilities. Once a student has been admitted to the charter school through an appropriate process, he or she may remain in attendance through subsequent grades. A new applicant for admission to the school, however, would be subject to the lottery if, as of the application closing date, the total number of applicants exceeds the number of spaces available at the school.

Enrollment Timeline and Policy.

The Trinitas Academy Governing Board will establish its own enrollment timeline based on board-adopted policy and in compliance with NC DPI requirements. Below are the guidelines for application for enrollment to Trinitas Academy:

1. Returning students (students who currently attended the school and intend to return the next school year) are given priority in admission if they notify the school of their intent to return for the next school year by the 2nd Friday of January of each school year.
2. To be eligible for kindergarten, a student must be five (5) years of age before September 1 of the year the student starts kindergarten.
3. Students of teachers, staff and Trinitas Governing Board members and siblings of currently enrolled students as well as returning students (that have notified our school that they intend to return) are exempt from the lottery requirements. If there are more of the above-described students than spaces available, they will be entered into a separate lottery and either admitted if space allows them or placed on the waiting list in the order that they are drawn. **Definition of Sibling:** A “sibling” is defined as an immediate family member of the applicant or a blended family member of the applicant through marriage or guardianship. A birth certificate, marriage certificate, or court documentation is necessary to approve the sibling priority. It does not apply to the extended family of siblings unless legal guardianship documentation is provided. The sibling must be currently enrolled in Trinitas Academy. Priority status will be revoked if the sibling withdraws from the academy before the applicant is offered enrollment. Suppose the sibling withdraws from the academy before attending at least one day of attendance for the year they are registered. In that case, the priority status and any offer/registration of the applicant will be revoked. Priority status does not guarantee placement. Another separate lottery will be held for applicants who do not fall into either of the two abovementioned categories and who submit applications prior to the deadline. These students will be admitted if there is space or will be placed on the waiting list in the order drawn. For this policy, “sibling” shall mean a biological or legally adopted brother or sister residing in the same household as the applicant. Cousins, nieces, nephews, and unrelated children share an address with guaranteed enrollment of each listed sibling.
4. As long as the total number of students allowed constitutes only a small percentage of the total enrollment, as permitted by federal guidance on the North Carolina law.
5. Parents and students may be encouraged, but not required, to attend an informational meeting about the School prior to submitting an application for admission. The Trinitas Academy Enrollment package will include the following: Name of Student, Date of Birth, Name of Parent/Guardian, Address, Contact Information (Phone/Email), Home School District, Current Grade and Grade Level Requested for Admission, and Name of Siblings Attending/Applying for Admission.
6. The School shall make clear at meetings and in the written information provided along with the application that any student in Primary and Secondary districts may apply.
7. Marketing materials will be provided in English and Spanish languages.
8. The School shall begin publicizing the availability of student positions at the School at least two months prior to the date of the lottery. The lottery date is scheduled for a close of April 1st, and a drawing for admission is scheduled for April 10th. (Within 15 days of application close).
9. The lottery will be conducted using lottery selection software under the supervision of the campus Principal or an observer designee. This ensures that the winner list and the waiting list are selected randomly. The results of the lottery shall be certified by a notary public.
10. Parents/Guardians will be notified within 24 hours of the lottery or as a potential seat becomes available. Parents/Guardians



will receive a phone call, email, and mailed letter notifying them of their admission. If a student is going to enroll in Trinitas Academy, the student's parent or guardian must accept enrollment within 10 school days of receiving notice of admission, or the spot can be made available to the next student/family.

11. If more students apply to our school than can be accommodated, the school will allocate spaces through a lottery process or fill available positions in the order in which applications were received before the application deadline using the notice to the public as provided as required by statute. When the number of applicants exceeds the number of spaces available, students shall be selected by a random lottery, taking into consideration the enrollment preferences outlined in this policy (siblings, etc.). If additional spaces become available after the initial selection, students shall be offered admission based on their order on the waiting list. Any spaces available after all students on the waiting list have been offered admission shall be filled on a first-come, first-served basis. Waiting lists are not maintained from year to year: students on the waiting list who are not offered admission and wish to be considered for admission the following year must submit a new application and repeat the lottery process if necessary.

12. The lottery shall be held no earlier than April 10th of the year prior to the start of school for that lottery being held. Our target open date for the lottery is January 1 of each year.

13. All forms will be provided in English and Spanish. The following documents are requested upon offering admission to the school:

1. Certified copy of the child's birth certificate
2. Current Immunization Record
3. Social Security Card for the child (if available)
4. Photo ID of Parent or Guardian
5. Proof of Residency (Current Utility Bill, Lease Agreement)

1. Property deed
2. Mortgage documents
3. Property tax bill
4. Rental agreement or lease (including Section 8 agreement)
5. Utility bill (water, electric, gas, cable, phone)
6. W-2 wage statement Payroll stub
7. Other documentation from a state, tribal, or federal agency (Social Security Administration, Veterans' Administration, NC Department of Economic Security, etc.)

6. Proof of Income (Tax Return, Current Paystubs, Letter of Employer, etc.), if applying on the basis of being economically disadvantaged for lunch.

7. Court Documentation or letter from Child Protective Services (CPS) establishing foster care, if applying on the basis of conservatorship

14. Based on space availability, the School shall continue to accept students from its waiting list or, if the waiting list is exhausted, from parents submitting applications after the deadline for the lottery up until January 1. The School may accept students after October 1 at its discretion following the school's administrative transfer and enrollment process.

15. A charter school's admissions policy may not discriminate against students on the basis of sex, national origin, ethnicity, religion, disability, academic, artistic, or athletic ability, or the district the child would otherwise attend. Trinitas Academy does not discriminate on the basis of actual or perceived race, color, religion, national origin, sex, age, disability, gender identity or expression, or any other classification protected by law in any of its business activities, including its educational programs and activities which comply fully with the requirements of state and federal law and Title IX. In the event of possible discrimination, the Trinitas Academy Principal will be the point of contact for any claim.

16. The School reserves the right to exclude from admission a student with a documented history of a criminal offense or a juvenile court adjudication.

17. If space is available, an eligible student must be admitted and enrolled on any day at any time of the day and must be counted as and considered a student immediately.

Applicant Evidence :

Trinitas Proposed ENROLLM...

Uploaded on **4/15/2024** by **Joe Higgins**



11.8. Certify

Q214. This subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q215. Explanation (optional):

Dr. Nutting has worked in the North Carolina academic system for over 30 years and has extensive knowledge of starting, growing, and operating a public charter school.

Board Chair Mark Lockman served in the Charlotte Mecklenburg SD and in leadership at the Iredell Statesville School District. He led the effort to start up Davidson Day School and uniquely knows the opportunities and challenges of opening a new school.

Board Member Joe Higgins has spent a decade opening and operating public charter schools. He has experience opening special needs charters and at-risk youth charters and a long-term leadership role in a private college prep private school.



12. Operations

12.1. Transportation Plan

Q216. Describe in detail the transportation plan that will ensure that no child is denied access to the school due to lack of transportation. Include budgetary assumptions and the impact of transportation on the overall budget.

The details of this plan should align with the mission, identified need for the charter school, targeted student population, and the budget proposal. If you plan to provide transportation, include the following:

1. Describe the plan for oversight of transportation options (e.g., whether the school will provide its own transportation, contract out for transportation, attempt to contract with a district, or a combination thereof) and who on the staff will provide this daily oversight.
2. Describe how the school will transport students with special transportation needs and how that will impact your budget.
3. Describe how the school will ensure compliance with state and federal laws and regulations related to transportation services



School Busing:

The school is budgeting to lease/purchase or contract with First Student (firststudentinc.com) for one school bus for the first year and hire one driver to meet transportation needs. We are budgeting \$45,000 in year one to accommodate our lease/purchase bus service or for contracting. Once we enroll and take a survey of the school's transportation needs, the Principal will research the most efficient and cost-beneficial option to provide transportation.

The Principal will develop a strategic pick-up and drop-off location, using enrollment data and software to map student addresses and cross-reference with parent needs surveys.

We aim to assist families with transportation challenges that may affect their children's enrollment.

As the school grows, we aim to purchase expanded transportation options to meet parents' needs.

Carpool Options:

Trinitas Academy will help provide transportation options through an electronic carpool service like www.carpooltoschool.com. This service provides secure, online commute matching and calendaring to school communities. In addition to the convenience that carpooling provides parents, an electronic carpool system sets a high standard of safety and efficiency. These systems ensure that students are not released from the building until their ride has arrived in the pick-up line, which helps ensure quick transitions and safety for students being picked up after school. Families can find information about electronic ride-sharing on the school website or at the school's front desk.

Special Transportation Needs

The bus service will also be able to transport EC students if transportation services are needed to serve those students.

In the McKinney-Vento Homeless Assistance Act, our school will provide transportation services to allow enrolled homeless students to become homeless. We will ensure that homeless students have educational stability and continuity, even if their living situation changes. Transportation will be provided free of charge to the student or family. This could include providing bus passes, arranging for the student to be transported by the district's school buses, or other methods to get the student to and from school.

Transportation Compliance

The Principal will work closely with our bus service provider/staff and parents to monitor student transportation and resolve any issues. We will review our transportation plans yearly and adjust accordingly. Students and parents will sign a transportation agreement to ensure we are meeting their needs and that our parents understand the rules of the bus program. All transportation services will comply with state and federal laws and prioritize student safety.

Attached is a sample schedule, analysis of miles driven, and pick-up schedule times from UNC Charlotte Urban Institute for area busing.

Applicant Evidence :



Uploaded on 4/12/2024 by Joe Higgins

12.2. School Lunch Plan



Q217. 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. If the school intends to participate in the National School Lunch Program, include the following components in the response:

1. How the school will comply with applicable local, state, and federal guidelines and regulations;
2. Any plans to meet the needs of low-income students; and
3. Include how the school intends to collect free- and reduced-price lunch information from qualified families. If a school intends to participate in the Community Eligibility Provision, describe the methodology the school will use to determine eligibility.

Trinitas Academy will ensure that every child has access to a daily meal. We intend to contract with a local catering company to prepare meals on-site. Parents will be provided a month-long menu of options to choose from and pricing associated with each meal. Our goal is to price each lunch affordably with high-quality, nutritious food. Our vendor will be responsible for preparation, clean-up, and payment acceptance from the parents.

Parents may choose to pack a lunch for their students, and we will offer special food days from outside restaurants as needed.

This is for those students who would qualify for Free or Reduced Lunch (F/RL). Our school administration will identify students who qualify for F/RL through an annual form provided at the time of enrollment. Trinitas Academy will budget \$18,150 in our operating budget for year 1 for the expense of meals for these students to be provided lunch from the local catering service. Students will not be aware of who receives F/RL to remove any stigma. We arrived at our lunch budget based on the US Census calculation of people living in poverty in Mooresville, which is 7.8%.^[1]

From the student's perspective, there will be no difference in how they receive lunch from the way students whose families are paying for the lunch receive lunch. There will be no stigma attached to receiving a Free or Reduced-Price Lunch.

Supervising kitchen staff will monitor trends of how much food is being thrown away and be on the watch for students who are not eating.

For students who forget their lunch, we will provide food on a time-to-time basis.

Our annual stakeholder survey will include feedback on our lunch program. We will share survey results with our catering vendor to ensure they are meeting the needs of our families.

[1] <https://www.census.gov/quickfacts/fact/table/mooresvilletownnorthcarolina/PST045222>

12.3. Civil Liability and Insurance

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

1. Errors and Omissions: one million dollars (\$1,000,000) per occurrence;
2. General Liability: one million dollars (\$1,000,000) per occurrence;
3. Property Insurance: For owned building and contents, including boiler and machinery coverage, if owned;
4. Crime Coverage: no less than two hundred fifty thousand dollars (\$250,000) to cover employee theft and dishonesty;
5. Automobile Liability: one million dollars (\$1,000,000) per occurrence; and
6. Workers' Compensation: as specified by Chapter 97 of NC General Statute, Workers' Compensation Law

Q218. Complete the attached table, indicating the amount of each type of coverage as outlined in a quote obtained from an insurance provider.

Upload Required File Type: excel Max File Size: 30 Total Files Count: 10



Resources

Insurance Coverage Templa...

Applicant Evidence :

Trinitas - Insurance Coverag...

Uploaded on 4/12/2024 by Joe Higgins

Q219. Attach Appendix L: Insurance Quotes

• 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.

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Evidence :

Trinitas School - Insurance B...

Uploaded on 4/12/2024 by Joe Higgins

12.4. Health and Safety Requirements

All public charter schools are required to follow the regulations regarding health and safety as stated in G.S. 115C 218.75.

Q220. We, the Board members 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. The Board Chair must sign this question.

Signature

12.5. Start-Up Plan



Q221. Provide a detailed start-up plan for the proposed school, specifying tasks, timelines, and responsible individuals (including compensation for those individuals, if applicable).



Trinitas Academy has negotiated a lease with Langtree Group that includes the initial start-up and fixturization costs detailed below. Langtree Group will provide the start-up funds necessary to cover the expenses that will occur in the start-up process before the state revenue is received. The commercial lease with Langtree Group has been enclosed, noting the Start-up funds budgeted at \$400,000.

Terms of this lease include the source and use of funds as follows.

The Start-Up Budget describes the budgeted start-up costs as follows:

Administration/Instruction/Support

Principal	\$ 38,628
Clerical	\$ 14,000
Office Supplies	\$ 36,400
<u>Curriculum & Resource Materials</u>	<u>\$148,985</u>
Total Administration/Instruction/Support	\$227,385

Operations & Maintenance

Marketing	\$50,000
Student Technology Equipment	\$59,119
<u>Office Technology Equipment</u>	<u>\$25,887</u>
Total Operations & Maintenance	\$135,006

Total Expenditures \$362,391

Contingency Fees \$ 37,609

Total Start-Up Expenditures \$400,000

Start-Up Budget Assumptions

Expenditure Assumptions

Principal- The Trinitas Academy Governing Board will establish the school's board policies and processes for financial planning, accounting, purchasing, and payroll. The expertise of the Governing board in these areas will be instrumental in policy formation. In addition to the first-year board training, the Governing Board will seek outside expertise from the North Carolina Department of Education and allied professionals with a background and expertise in charter school management.

The Principal will manage/delegate and direct the Business Office Manager, who serves as a member of the Administrative Team of Trinitas Academy. The Principal is responsible for providing leadership related to all financial responsibilities. The Administrative Team will maintain all confidential school records of students, personnel, and finances in a manner consistent with administrative, ethical, legal, and regulatory requirements of the educational system and the State of North Carolina. Responsibilities include payroll, accounts receivable, and accounts payable functions of the Business Office, reporting, procurement, and HR.



- **Principal** - Trinitas Academy will hire a Principal three (3) months before the school opens. The salary expense is calculated as 25% of the \$103,000 (plus benefits) annual salary, or \$38,628. The salary is based on the Iredell Statesville SD pay scale 2023-2024.
- **Clerical Staff** - Trinitas Academy will hire clerical staff three (3) months before school opening. Salary expense is calculated as 25% of \$40,000 (plus benefits) annual salary or \$14,000.
- **Office Supplies**- Trinitas Academy will purchase 40% of its Equipment and Supplies budget to effectively register students and operate the functions of the high school prior to opening day, a total \$25,772 as described below:

Copiers (lease)	\$8,000
Office Start Up	\$5,372
Teacher Supplies	\$9,400
<u>Raptor Security System</u>	<u>\$2,000 (Drivers License Check for visitors on campus)</u>
Total	\$25,772

- **Marketing**- Trinitas Academy has budgeted year zero marketing cost prior to opening day, total \$70,000 per Marketing Budget for the school launch. Annual marketing budgets will be included in the school's annual budget. This amount represents only the amount to be paid from start-up funds, which are budgeted and to be paid for from capital funding for the overall development cost of the school facility. Overall facility sources and uses of funds are included in this application.
- **Office Technology Equipment**- Trinitas Academy will purchase \$25,887 of the office technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.

Document Cameras	\$289 x 20	= \$ 5,780
Servers- Admin Computers		= \$12,500
<u>Firewall</u>		<u>= \$ 7,607</u>
Total		\$25,887

- **Student Technology Equipment**- Trinitas Academy will purchase \$59,119 of the student technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds, and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.

Staff Chromebooks	\$349 each * 22	= \$9,319
<u>Student Chromebooks</u>	<u>\$249 each * 200</u>	<u>= \$49,800</u>
Total		\$59,119

- **Curriculum & Resource Materials**- Trinitas Academy will purchase curriculum materials and equipment prior to opening day, a total of \$148,985 to include teacher and student resources for Math, ELA, Science, History, Logic, Latin, art supplies, music start-up supplies, and physical education start up items. (See attached break down)
- All operations and maintenance will be reflected in the Year 1 budget. Contracted services, including HR, accounting/audit, landscaping, and janitorial, will be reflected in the Year 1 budget.

The principal and office manager are budgeted to be hired in May of 2024. Budgets reflect salary and benefits for their initial salary to be incurred during Year 0.

Beginning in December of 2024, our marketing buys will ramp up as described in the marketing plan. Our enrollment lottery will go live in January 2025, and the lottery list will start. All prior interest lists will be notified of the lottery. These lists have been communicated with and invited to all the events that the school has planned monthly. The idea is to build excitement around the school and word of mouth for our efforts to grow.

The applications to enroll will be in both Spanish and English. Once a family enrolls, electronic communication is generated, and our leadership team will reach out via phone and invite the family to any community events we have planned in the near future. The deadline to apply in the lottery will be April 1, 2025. The actual lottery will take place on April 6th, 2025. Based on our enrollment goals, we will reserve 78 seats in each grade up to 6th grade in year one. Siblings will receive preference per North Carolina enrollment guidelines. Families will be notified by US Mail, phone, and email within 24 hours of the close of the lottery. Once notified, the family will have 10 days to respond and accept the position in the school. If a family declines or does not



respond within 10 days, we will continue to go down the enrollment list and enroll in order of the lottery draw.

After the initial re-enrollment lottery, we will continue communicating with our enrolled families and look for opportunities to bring the new families together to meet other families, school leadership, and their teachers. We will encourage all families to plug into our social media efforts as a way to share ideas and keep them engaged. Our Registrar will reach out for various enrollment documents we may need, and the goal from April to the school opening is to keep heavy communication with our parents.

Beginning in June, we will hold an open house at the campus if it is completed or at a convenient location as one more way to connect, inform, solicit feedback, and bring our community together.

We will set targets for early enrollment, lottery, and summer to ensure we achieve our enrollment goals. By January of 2025, we are setting a goal of 225 intents to enroll students. With the start of our marketing and the outreach from our leadership team, by the lottery (April 1st) we have a goal of 375 intents to enroll. Post lottery and before summer, we look to have a waitlist in grades K3 and be at our enrollment targets for 4th to 6th.

The Principal and Business manager will hold weekly meetings beginning in April/May, depending on their hire dates, to review enrollments and ensure targets are on track.

Start-up and Financial Oversight

The Trinitas Academy Governing Board will establish board policies and processes the school will use for financial planning, accounting, purchasing, and payroll. The expertise of the Governing board in these areas will be instrumental in policy formation. In addition to the first-year board training, the Governing Board will seek outside expertise from the North Carolina Charter School Association and allied professionals with a background and expertise in charter school management.

Financial Policies and Responsible Party: The Finance Committee shall consist of at least the Board's Treasurer and the Principal. The Financial Committee shall meet at least two (2) times per school year. The purpose of the Financial Committee shall be to prepare annual budgets for full Board review and approval, coordinate the Annual Audit, and develop long-term financial goals and plans for full Board consideration.

The Principal will manage and direct the Principal and Business Office Manager, both of whom serve as members of the Administrative Team of Trinitas Academy. The Principal is responsible for providing leadership related to all financial responsibilities. The Administrative Team will maintain all confidential school records of students, personnel, and finances in a manner consistent with administrative, ethical, legal, and regulatory requirements of the educational system and the North Carolina Department of Education. Responsibilities include payroll, accounts receivable, and accounts payable functions of the Business Office, reporting, procurement, and HR.

As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

- Financial duties and responsibilities must be separated so that no one employee has sole control over cash receipts, disbursements, payrolls, and bank account reconciliations.
- Computer will complete all documentation related to financial matters.
- The Governance Council can appoint someone else to perform the Principal's responsibilities in the case of absence.
- Establishment of a Purchasing Policy—The Principal may authorize expenditures and sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss statement and approve contracts over \$5,000.
- Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Retention of Records, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, and asset management are all policies that will be established by the Governing Board and executed by the Principal.
- The Petty Cash and Credit Card Use Policy will be established using a framework generally acceptable to Charter School cash handling procedures.
- Consideration of in-house capabilities to accomplish services before contracting for them will be considered. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of the need for any



contracts over \$5,000. Written contracts clearly define the work to be performed and will be maintained for all contract service providers (i.e. consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Principal will approve proposed contracts and modifications.

Annual Audit. In addition to monthly reports provided to the Governing Board, a customized dashboard will be developed to help all the Governing Board members interpret the financial health of the school. A quarterly report will be given to the Governing Board on the current and future financial situation of the school. All reports to the Governing Board will include current Profit and Loss statements, Balance Sheets, aging reports, and budget versus actual. The Governing Board will commission an annual financial audit by an independent third-party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to the charter-granting agency. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 before year-end (June 30th).

Annual Financial Compliance Report. Each year, Trinitas Academy will prepare its annual financial statements, which will be part of the annual audit from an outside CPA firm. These statements will be sent to the North Carolina Department of Education for review and count towards the school's North Carolina financial performance goals. The due date, given the school's June 30 fiscal close, will be due to NC on or before November 27th or no later than 150 days after the fiscal year-end. The Trinitas Academy Governing Board will first approve the prepared annual financial statements and audited financials with signed documentation that the board has approved the statements. All financial audits and adopted budgets will be posted on the school's website for public preview.

Applicant Evidence :


Sample Curriculum Buy - Tri...

Uploaded on **4/12/2024** by **Joe Higgins**

Q22. Describe what the board anticipates will be the challenges of starting a new school and how it expects to address these challenges. Submit a Start-up (Year 0) Budget as Appendix O, if applicable.



Facility Challenge

The single biggest challenge facing charter schools today is facilities. The cost of construction, rapid growth in our area, which puts pressure on land prices, and competition for usable spaces are all causing a major challenge for North Carolina charter schools. The Trinitas Academy team has a building that is secure and ready to occupy. Our board has an outline of a lease, which includes contents (student desks, teacher desks, gym equipment, lunch room equipment, etc). As part of the board's lease negotiations, we have included a \$400,000 fixturization fund to address early fees needed to perform our model. (Detailed in the Start Up Budget - Attachment O). The lease includes a sliding scale rent based on our actual enrollment and options to purchase the building based on market conditions and timing.

Staffing Challenge

The challenge of finding qualified staff is being addressed by the principal, Dr. Boen Nutting. Dr. Nutting has been a Principal (for 8 years at the Mt. Mourne Campus in an International Baccalaureate program for the Iredell Statesville School District) and as an Assistant Superintendent with the Iredell Statesville School District. Her experience as a teacher, campus leader, and district-level HR director is all incredibly important in tapping into the local teacher pool.

Enrollment Challenge

Enrollment of students is another area of concern when opening our charter on time and budget. Early marketing and outreach have built an interest list of 250+ students with families from the local area. At the time of submission, we are adding 12 to 20 students per week. All preliminary outreach to families, pre-schools, churches, and other community organizations will continue. Nearby charter schools, including Pine Lake Academy, have long verified wait lists. Mooresville area is the fastest-growing community in the State of North Carolina, and the area school district has schools slated for construction to meet the growing demand. Still, they are struggling with current construction budgets and postponing openings.

Applicant Evidence :


Attachment O - Trinitas Star...

Uploaded on **4/12/2024** by **Joe Higgins**

12.6. 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.

Q223. What is your plan to obtain a building? Identify specific steps the board will take to acquire a facility and obtain the Educational Certificate of Occupancy. Present a timeline with reasonable assumptions for facility selection, requisition, state fire marshal and health inspections, and occupation.



Trinitas Academy has secured a building that is ready to occupy immediately. 1431 Mecklenburg Hwy, Mooresville, NC 28115. The Iredell Statesville School District previously owned the building. It housed the International Baccalaureate choice program until it was moved to Brawley School Road. The campus helps 800 students in a program that is similar to Classical Education. The campus sits on 12 acres and has 60,268 square feet of classrooms and facilities.

Trinitas Academy's Principal, Dr. Boen Nutting, was at the site for 7 years and uniquely understood the building and campus. The campus was purchased from the school district in 2022. Since the campus was purchased, the new owners have hired Dr. Kenny Miller, who retired after 50 years of service from the Iredell Statesville School District. During his tenure with the school system, he served 22 years as Assistant Superintendent of Facilities and Planning. We had 37 schools in the district, and he oversaw all aspects of site location, construction, maintenance, and safety at all facilities. Dr. Miller worked closely with the International Baccalaureate Principal, Dr. Boen Nutting, when she was Principal at the Mt. Mourne campus.

Since the building has been sold, the campus has been maintained and inspected when not occupied by the system to ensure the building and systems remain in excellent condition. The local fire department, city and county building inspectors, State Insurance inspector, and State Boiler / Pressure vessel inspector have visited when needed as upgrades are made to ensure compliance and maintain occupancy requirements. The building was never taken out of service and has a current tenant in the space, so the Certificate of Occupancy approvals are up to date.

Since 2022, the following maintenance and improvements on the Mt. Mourne campus are complete or scheduled to be complete before the potential opening of school 2024 / 2025 should it be approved:

- New roofing in the back portion of the campus is complete and will result in all roofing replaced within the last 5 years.
- HVAC – replace outdated controls with new DDC control system; perform maintenance on Air Handler Units in every classroom; replacing pumps where needed and clean up and preventive maintenance to Boiler & Chiller.
- Painting through some of the building with full paint to be completed by the summer of 2024.
- Floor stripping and waxing – as well as replacement in specific areas, to be completed by summer 2024
- Remove the commercial kitchen in preparation for a vendor to work with the school on food services.
- Upgrade of existing Fire Panel with New programable fire panel (fully monitored)
- Review by the Mooresville Fire Department of the fire system to ensure up-to-date compliance.
- Redesign of the traffic system on the campus to improve stacking for pick up / drop off and improve student safety
- New Security and Camera system for improved safety
- School safety improvements already in place (identification and electronic control of entry access; ballistic film; panic button; limited key access)
- Fencing of campus and traffic access control will be part of the site improvements to be completed prior to the school opening

Prior to the Trinitas Academy opening, the school will have the following items done in preparation for its academic program.

- Internet and network system reviews and upgrades
- In classroom projectors, phone systems, bell systems, and communication.
- Whiteboards and furniture for students and teachers are installed in each used classroom.
- Lunchroom capacity to meet the needs of the students (kitchen and dining area)
- Security fencing to create a closed campus environment.
- Security camera placement adjustments as needed.
- Play system installed for the younger students.

The location of the Mt. Mourne school is ideal for enrollment and ease of getting to. The school is located a mile from the international headquarters of the Lowe's Home Improvement company. There are hundreds of key strategic partners in Low's chain, and their corporate headquarters are located in the area. The Iredell County region has seen 20% growth over the last decade and is expected to grow by 23.6% through 2030. Through interviews and presentations to Loew's leadership, having a rigorous, character-based school option was one of the main concerns discovered.

Mooresville and the Lake Norman area are home to NASCAR teams and affiliated businesses to NASCAR teams. Various members of the Trinitas Governing Board have had preliminary discussions about the proposed school and the education model. The feedback regarding school choice, capacity issues with existing charter schools (Pine Lake Prep K12 is full with a 4000+ student waiting list), and the prohibitive cost of local private school options further demonstrates the viability of the proposed school.



The State of North Carolina Department of Transportation is opening an additional interchange of I77, which will put the Mt. Mourne campus in the middle of multiple modes of transportation.

Q224. Describe the school’s facility needs based on the educational program and projected enrollment, including: number of classrooms, square footage per classroom, classroom types, common areas, overall square footage, and amenities. Discuss both short-term and long-term facility plans. Demonstrate that the estimate included in your budget is reasonable.

The Mt. Mourne school has operated for 75 years, with numerous upgrades and expansions. The Iredell Statesville School District sold the school and moved its International Baccalaureate program out of the campus. The programmatic needs of the Classical Education model are consistent with those of an IB program. The Trinitas model looks for enrollment of 26 students per classroom with 4 classes per grade band.

The Mt. Mourne campus has 60,268 sq ft on a 12-acre campus. Attached are the building site plan and site boundaries.

The Classical Education model features art, music, physical education, and ample outside play areas for recess, lunch, and after-school programs. The Mt. Mourne campus can incorporate all aspects of our model.

A full-size gymnasium has a performance stage and a dedicated music room for coral practice and music classes. There are ample administrative offices, food service facilities, nurses' offices, athletic facilities, and ADA restrooms.

There are many outside play areas and common areas to accommodate students of all ages. We will be adding outdoor picnic and dining areas, as well as a play system in a special area for K3 students.

There are 27 to 30 classrooms available, depending on how we program the school as we grow.

Classroom sizes range from 800 to 1000 square feet.

The building will be leased with terms reflected in our 5-year operating budget. The occupancy cost was negotiated to be 15% of ADM revenues from the state with a cap of \$900,000 annual facility cost.

The Governing Board will review options for bond funding once the school is able to do so.

Applicant Evidence :


MT. MOURNE FLOOR PLAN...

Uploaded on **4/15/2024** by **Joe Higgins**


22073-Mt-Mourne-School-12...

Uploaded on **4/15/2024** by **Joe Higgins**


Kenny Miller - Building Repo...

Uploaded on **4/25/2024** by **Joe Higgins**

Q225. Describe school facility needs, including: science labs, art room, computer labs, library/media center, performance/dance room, gymnasium and athletic facilities, auditorium, main office and satellite offices, workroom/copy room, supplies/storage, teacher workrooms, and other spaces.



The Mt. Mourne school has been in operation for 75 years, with numerous upgrades and expansions. The Iredell Statesville School District sold the school and moved its International Baccalaureate program out of the campus. The programmatic needs of the Classical Education model are consistent with those of an IB program. The Trinitas model looks for enrollment of 26 students per classroom with 4 classes per grade band.

The Mt. Mourne campus has 60,268 sq ft on a 12-acre campus. Attached are the building site plan and site boundaries.

The Classical Education model features art, music, and physical education, as well as ample outside play areas for recess, lunch, and after-school programs. The Mt. Mourne campus can incorporate all aspects of our model.

A full-size gymnasium has a performance stage and a dedicated music room for coral practice and music classes. There are ample administrative offices, food service facilities, nurses' offices, athletic facilities, and ADA restrooms.

There are many outside play areas and common areas to accommodate students of all ages. We will be adding outdoor picnic and dining areas, as well as a play system in a special area for K3 students.

There are 27 to 30 classrooms available, depending on how we program the school as we grow.

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The building will be leased with terms reflected in our 5-year operating budget. The occupancy cost was negotiated to be 15% of ADM revenues from the state with a cap of \$900,000 annual facility cost.

The Governing Board will review options for bond funding once the school is able to do so.

Applicant Evidence :


Mt Mourne Campus Photos....

Uploaded on **4/15/2024** by **Joe Higgins**

Q226. What is the breakdown of cost per square foot for the proposed facility? Outline how this cost is comparable to the commercial and educational spaces for the proposed school location.



The lease terms that Trinitas Academy has secured are well below market rates. The landlord understands the nature of a school start-up and has agreed to structure the rent.

The lease is structured as a percentage lease common in retail and restaurant operations. In a percentage lease, the tenant pays a base rent plus a percentage of their gross sales revenue once they reach a specified sales "breakpoint" or threshold. This lease option allows the tenant to pay a lower base rent but then share a percentage (up to 15% of the school's ADM capped at \$900,000) of their sales above the breakpoint with the landlord. Percentage leases are commonly used for commercial properties like retail stores, shopping malls, and outlets where the tenant's sales are growing. The percentage rent is calculated as a percentage of the tenant's gross sales above the breakpoint, in addition to the fixed base rent.

Given the unusual nature of a functioning school, the lease is below market in the beginning years and at market as the school grows. There is a tremendous challenge in finding usable spaces for schools in North Carolina. The rapid growth has driven land and construction prices out of reach for many start-up schools. Only three of the three of the 12 charter schools approved to open in 2024 are ready to open. From WFAE 90.7 article dated April 10, 2024 – **Twelve NC Charter Schools Were Approved To Open, Only Three Did –**

Ashley Baquero, the state's charter school director, says finding a building has also been the biggest problem for the other schools that have delayed their opening date.

The state provides operating money for charter schools based on the number of students, but there's no public money for facilities. After applications are approved the boards have to raise money or get loans to buy or lease a building.

"In the current market, this compounds with the scarcity of appropriate properties and high-interest rates to make it very difficult to both find and finance buildings," Baquero said. And without a building, she said, it's hard to get parents to sign up, creating an enrollment challenge as well. Thus, this spring has brought a stream of boards asking for another year. [1]

The Mt. Mourne school was purchased by a local real estate company that has a three-generation relationship with the school. The highest and best use for the land was most likely apartments but the landlord decided that the campus and its history for their family and the Mooresville area was too important to demolish.

[1] <https://www.wfae.org/education/2024-04-10/twelve-nc-charter-schools-were-approved-to-open-in-2024-only-three-are-ready>

Q227. 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.

The Trinitas Academy Governing Board has secured lease terms that allow the school to open immediately. Appropriate permits, operational plans, fixtures, and a Certificate of Occupancy exist on the Mt. Mourne campuses.

Q228. Describe the board's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.



The Trintias Academy Governing Board is made up of a diverse group of business professionals with first-hand experience in facility acquisition and management. The school is already built out and ready to occupy, so needed renovations will be completed by the summer of 2024. These upgrades and repairs are listed in Question 223.

The experience and capacity of the Governing Board relate to real estate.

Board Chair Mark Lockman has spent the past two decades in area construction and development. He has project management experience, including overseeing and advising site planning, project planning scheduling, and budget responsibility. He has an extensive background in the local area and understands the municipalities and contractor pool in the Mooresville area. Prior to his years in construction, Mark was the founder and developer of Davidson Day School. In that role, he secured funding and managed all aspects of opening the new school.

Board Member Joe Higgins has a long history in private development and expansion in various markets. Most recently, he served as the founding CEO of a Classical charter school in Colorado and Arizona. In that role, he oversaw purchasing, funding, and constructing seven campuses in multiple jurisdictions. He understands capital markets, building cost structures that allow a charter school to be successful, and maintenance and upkeep planning.

Board Member Mikail is an attorney practicing business law, mergers, and acquisitions at Kilpatrick, Townsend, and Patrick. Mikail is well-versed in construction contracts and high-level negotiations for business services or facility needs.

12.7. Certify

Q229. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q230. Explanation (optional):



13. Financial Plan

13.1. Charter School Budget

All budgets should balance indicating strong budgetary skills. Any negative fund balances will, more than likely, generate additional questions by those evaluating the application. 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.

Q231.If applicable, attach as Appendix M: Revenue Assurances. Assurances are needed to confirm the commitment of any additional sources of revenue.

Not applicable.

Q232.Attach as Appendix N: Proposed Budget for Year 1 through Year 5 [Click here to access and download the Budget Template.](https://www.dpi.nc.gov/2024-budget-template/download?attachment) (https://www.dpi.nc.gov/2024-budget-template/download?attachment)

Upload Required File Type: pdf, image, excel, word, text Max File Size: 30 Total Files Count: 5

Applicant Comments :

Note budget narrative.

Applicant Evidence :


Q232 Trinitas Budget Narrat...

Uploaded on **4/19/2024** by **Joe Higgins**


Trinitas FINAL - 2024 NC Cha...

Uploaded on **4/19/2024** by **Joe Higgins**

13.2. Budget Narrative

Please include additional information that explains the assumptions used in the 5-year budget.

Q233.How was the student enrollment number projected?



Mooresville, North Carolina, like many growing communities, faces challenges with school capacity and meeting a diverse group of new families. The Trinitas Academy enrollment projections were derived from our leadership team's knowledge of the local community and trends in migration to the area. Our leadership has years of experience in public education, charter school operations, real estate, community service, and public policy. We held open houses and solicited feedback from area families, churches, preschools, and community members. This work and researching the trends in area education and growth helped us comfortably arrive at our enrollment projections.

Demographic Growth: Rapid population growth has strained existing educational resources. Verified wait lists at the closest charter school, Pine Lake are 4500+ students. North Carolina ranks in the top 5 fastest growing states in America. Over the past decade, North Carolina has seen significant growth, with several cities experiencing notable increases in population. The fastest-growing city in North Carolina is Mooresville, which has seen a 43.24% population increase over the past eight years (according to the N.Weaver Statesville Chamber of Commerce)

In the Charlotte metropolitan area, Mooresville is the fastest-growing city. The Charlotte metro, which includes Concord, has been ranked among the top 10 fastest-growing metros in the U.S., with a population growth of 8.1% from 2016 to 2021. A recent news report from Mooresville explains the challenges with rapid growth: ***You see it, and you can feel it: Mooresville residents beg town to address growth - Debate for measures like a moratorium continues among citizens as the Town of Mooresville grows.***- April 16, 2024, WBTV Link below.

Capacity at Existing Schools:

The Iredell-Statesville School District is facing capacity issues, particularly the need for a new high school due to significant population growth in the southern end of Iredell County (Mooresville, Hunter, Davidson, Cornelius). The Board of Education has identified this as a critical need and has requested the county to fund the construction of a new high school. The district's School Improvement Plans and the Facilities Task Force Recommendations highlight the need for new facilities, including a middle school, to accommodate the growing student population. In response to these needs, the Iredell-Statesville School District has approved a \$200 million funding request for the construction of a new high school.[1]

Rapid growth is putting a strain on the Mooresville area infrastructure, including schools. Trinitas Academy's program is unique to the area; our project has an existing school with a current certificate of occupancy and capacity for 800 students.

General Charter School Demand In North Carolina

Currently, 206 charter schools are operating for the 2022-2023 school year. Self-reported data from the state's charter schools indicate that 85% of charter schools had a waitlist totaling over 77,000 students statewide[2]. During the pandemic, charter schools showed significant gains in enrollment. As of December 1, 2022, over 137,500 students are being served by charter schools. This represents just over 9% of the total public school population as of the December 1 headcount. Charter enrollment gains during the pandemic show an increase of nearly 19%. A national review of charter school enrollment found that North Carolina had the nation's fifth-highest charter enrollment gains from the 2019 to 2021 school years.[3]

Our breakdown for the enrolled population, including EC students, economically disadvantaged students, and ethnic/racial diversity, is aligned to the surrounding Iredell-Statesville School District. Iredell-Statesville Schools operates 37 schools and has 20,163 students. The district's minority enrollment is 40%. The student body at the schools served by Iredell-Statesville Schools is 62.6% White, 13.9% Black, 3.1% Asian or Asian/Pacific Islander, 15.2% Hispanic/Latino, 0.1% American Indian or Alaska Native, and 0.1% Native Hawaiian or other Pacific Islander.

At schools in Iredell-Statesville Schools, 25.7% of students are eligible to participate in the federal free and reduced price meal program and 6.0% of students are English language learners.

[1] <https://www.iredellfreeneews.com/news-features/2023/i-ss-board-approves-200-million-funding-request-for-new-high-school/>

[2] Report to the North Carolina General Assembly, 2022 Annual Charter Schools Report S.L. 2013-335; S.L. 2014-115; S.L. 2019-165; S.L. 2020-49. June 15, 2023

[3] *ibid*



<https://www.wbtv.com/2024/04/17/you-see-it-you-can-feel-it-mooresville-residents-beg-town-address-growth/>

Q234. Provide an explanation as to why you believe there is a demand for the school that will meet this enrollment projection.



Demand for our location and model of instruction was derived from listening to families and community leaders and experience in operating choice schools that focus on academic rigor, character, and civic instruction and partnering with parents.

Three of our leaders have direct experience in public education and choice, particularly building choice models that provide a private school experience to all children regardless of their financial ability to pay.

Dr. Boen Nutting recently retired from the Iredell-Statesville School District. Her experience as a school Principal at the International Baccalaureate program has been invaluable in creating our demand projections. As Principal, she led a district-based choice program that was wildly successful. At its peak, the Mt. Mourne school we are looking to occupy had 800 students enrolled in the IB program. The IB program showed that parents are looking for diverse family options. The area's private schools provide these options, but many families' tuition is out of reach. What the IB program provided, similar to the Classical Education model we are proposing for this campus, is a private school experience for the entire community.

Board Member Joe Higgins has a long history in business and education. He's served in Catholic K8 and college prep high schools for over 15 years. He led a group of schools in Arizona and Colorado that took the Classical Education model and adapted and streamlined it for public education. During his tenure as start-up CEO, he grew a network of 7 campuses, a staff of 500, and over 4000 enrolled students. The success of the organization, in part, was creating a school environment that mirrored private schools, with academic rigor, a focus on character education, and a strong professional development platform. Under his leadership, employee retention averaged 90%, and all the schools were A or B-rated in the states they operated. He left the CEO role 2018 to help other groups grow and implement the Classical Education model.

Board Chair Mark Lockman spent the early part of his career in the Mecklenburg and Iredell Statesville School Districts. In his administration role, he implemented North Carolina's first data-driven instruction model. His efforts were later adopted statewide during the No Child Left Behind movement. He left ISSD and was one of the founders of Davidson Day School, helping it grow into a facility. Today, the school has 1960 K12 students. The model is a private prep college.

Diverse Options for Different Educational Models:

There are NO Classical Education public school options within an 18-mile radius of our proposed campus.

Demand For Classical Education Charters:

A survey report recently released by the Texas Policy Institute studied charter school enrollment trends over the past decade. It found that Classical Education charter school enrollment grew 7 fold compared to other charter models. The Classical Ed charter sector also grew along ethnic lines, with the most pronounced increase for Asian American (a thirteenfold increase) and Hispanic students (a ninefold increase).[i]

Unique Model of Instruction:

A Classical Education elementary school differs from traditional public schools in several ways. Classical Education emphasizes liberal arts, critical thinking, and effective communication, while traditional education focuses on core subjects and foundational skills. The classical approach teaches students HOW to learn, focusing on the time-tested process of discovery that follows the Trivium.

Learning and coursework in a Classical Education school are broken down into three phases: the grammar, logic, and rhetoric stages, each building upon the other and aiming to develop language proficiency, logical reasoning, character exploration, and persuasive abilities. Unlike the future-oriented focus of modern education, Classical Education is present-oriented, aiming to impart habits that must be practiced today to take root tomorrow, preparing students not only for the workplace but also for life as great parents, citizens, and lovers of beauty and truth.

Classical Education and Charlotte Mason

Trinitas Classical Academy blends traditional Classical pedagogy with the influences of Charlotte Mason. The addition of Mrs. Mason's philosophies and our unique blend of Dr. Duikers and Dr. Glasser's (Adlerian) approach to culture brings together a Classical Education model with a more student-centered approach. Students and parents find our proposed model more 'fun' and



less rigid.

Charlotte Mason was a classical English educator in England at the turn of the twentieth century. She proposed basing children's education on a wide and liberal curriculum. Mason's philosophy of education is best summarized by two key mottos found in her writings: "Education is an atmosphere, a discipline, a life" and "Education is the science of relations."

Mason believed that children were born people and should be respected as such; they should also be taught the Way of the Will and the Way of Reason. Her motto for students was "*I am, I can, I ought, I will.*" Mason emphasized the reading of high-quality literature and coined the phrase "living books" to denote those writings that "*spark the imagination of the child through the subject matter.*" Mason emphasized the reading of high-quality literature and coined the phrase "living books" to denote those writings that "*spark the imagination of the child through the subject matter.*"^[1] A Charlotte Mason and Classical blended model is much more hands-on and student-centered. Science focuses on nature studies; narration is an important component of our model's English program, and art and music are actively engaging subjects that hold high prominence in our schools.^[2]

Classical Education is, above all, systematic — in direct contrast to the scattered, unorganized nature of so much traditional education. This systematic, rigorous study has two purposes: ^[3] an academic learning environment that offers a holistic and time-tested approach to education, focusing on developing students' intellectual and moral virtues and academic knowledge and skills. Our novel selection, historic alignment at each grade, and integration of values and virtues into all aspects of the school day took years to perfect.

Homeschool Integration:

Our school looks to integrate the fast-growing homeschool community into a campus environment. The homeschool community is some of the most ardent supporters of the Classical Education movement. Our model blends Classical Education with the ideas of Charlotte Mason. Homeschool families choose the Classical model because it is heavily oriented toward the liberal arts, guided by the Western literature and history canon, and grounded in Greek and Roman traditions of academic excellence. Charlotte Mason's method focuses on living books, nature study in the science fields, and seeking to educate the whole child, not just their academic abilities.

The homeschool community typically selects one of 6 major categories or models of instruction: Classical Education for Homeschool, Charlotte Mason Style Homeschool, Montessori for Homeschool (typically used in lower grade levels), Unit Studies (Picking a theme, like a time in history, similar to the Trinitas model), School at Home (Traditional direct instruction using publicly available textbooks and mirroring a school day), Unschooling (unstructured and experiential). We believe that adding the homeschool community to our campus environment using a common curriculum platform, access to classroom teachers, the ability to include nationalized assessments, and creating a relationship between on-campus and at-home communities will provide a pipeline for future school students and support families that choose to school at home.

Our vision is to combine these two growth categories into an academically successful school. As North Carolina Opportunity Scholarships continue, more and more families will be looking for at-home options. Our experience has shown that including homeschooled families with traditional public charter school students will help homeschoolers with access to assessment, support, and rigorous curriculum offerings.

School Enrollment Research:

179,900 – 9.6%	<u>Homeschooled.</u> Growing. 52% growth from 87,978 to 179,900 over 10 years (NC Dept of Admin)
126,768 – 6.8%	<u>Private schools.</u> Growing. 25% growth from 95,768 to 126,768 over 10 years - (NC DOA)
151,485 - 8.1%	<u>Charter schools.</u> 68% growth from 48,795 to 151,485 over 10 years – to 2023. Growing.
1,397,273	<u>Traditional public school.</u> 4% decline from 1,443,998 to 1,397,273 over 10 years Declining.

1,855,426 Total Student Population –

Home – Charter – Private – Traditional



[1] Wikipedia contributors. "Charlotte Mason." *Wikipedia, The Free Encyclopedia*. Wikipedia, The Free Encyclopedia, 23 Oct. 2019. Web. 2 Dec. 2019.

[2] The Ultimate Classical Education and Charlotte Mason Toolbox by Joe Higgins, 2023

[3] Ibid

[i] The Demand for Texas Parents for Classical Charter Schools, A. Cheng, C. Syftestad. June 2023. <https://www.texaspolicy.com/the-demand-of-texas-parents-for-classical-charter-schools/> (<https://www.texaspolicy.com/the-demand-of-texas-parents-for-classical-charter-schools/>)

[ii] The Ultimate Classical Education and Charlotte Mason Toolbox by Joe Higgins, 2023

[ii] Ibid

Q235. Provide the break-even point of student enrollment.

The biggest challenge in arriving at and determining the break-even point for the school budget is the cost of the school campus. The percentage rent that the Trinitas Academy school has negotiated allows our break-even point to fluctuate depending on enrollment. The negotiated base rent of \$36,989 would make our school's break-even point 325 students based on full ADM. Rent is established as 15% of the school's ADM up to a cap of \$75,000 per month. The max rent will be at 665 students. From 665 to our maximum enrollment, the rent portion will stay consistent.

Teachers, administrators, and operational expenses will align with these break-even enrolment goals as they fluctuate with enrolled students.

Q236. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated.

In the event of a financial shortfall, the Trinitas Academy Finance Committee will work with the school principal to address the shortfall. Some of the options the leadership team will explore include:

- Reducing rent or negotiating with the landlord: If revenues are lower than expected, our school should work closely with its landlord to potentially reduce rent or renegotiate the lease terms to lower costs. Our school is working with a percentage lease agreed upon at 15% of the school's ADM. We are confident the school can manage shortfalls by managing this fixed cost. These adjustments can provide significant financial relief.
- Fundraising and seeking grants: Our school has a robust fundraising strategy, including seeking grants from foundations, corporations, and government sources, especially for specialized programs like special education, professional development, and other services. Grants can help offset budget shortfalls.
- Adjusting expenditures: In a shortfall, our team will closely monitor its spending and be prepared to make strategic cuts to non-essential expenses while protecting core academic programs and student services. This may involve reducing staff, limiting travel, or postponing facility upgrades.
- Maintaining a contingency fund: The school should aim to build up a contingency fund equal to 3-6 months of operating expenses to help weather unexpected revenue declines or cost increases. Building this fund will take time, but it will provide a financial buffer.
- Monitoring and adjusting the budget: The school's leadership and board will closely track revenues and expenditures throughout the year, making timely adjustments to the budget as needed to maintain financial solvency. Frequent budget reviews are crucial to identifying problems early.

Q237. 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. Also, describe any committed contributions and in-kind donations of goods or services to be received by the charter school that will assist in evaluating the financial viability of the school. Clearly indicate between those grants or in-kind donations which have already been firmly committed and those the board is planning to pursue. Be sure that the appropriate assurances documentation is provided in the appendices.



The Trinitas Academy does not rely on other state, county, or federal sources of income.

Board Member Joe Higgins provides the school with up to 2 years of classical-specific curriculum and training. His company will provide teacher support materials in print and digital, as well as training on the Classical Education model at no cost to the school for the start up year(s). These resources are available on Amazon.com and can be purchased by homeschool families.

Our school has a \$100,000 commitment from The Renee McGuire Foundation, which is not reflected in our proposed budget. Mrs. McGuire advocates Classical Education and has been a long-term developer in Houston, Texas.

Applicant Evidence :



Uploaded on **4/16/2024** by **Joe Higgins**

Q238. Provide the student to teacher ratio that the budget is built on.

Our student-to-teacher ratio is 16:1

This includes teaching staff (19:1), academic coaches, teacher assistants, ED teachers, and aides.

Our classroom size will be 26 students per class.

Q239. Describe the board's individual and collective qualifications and capacity for implementing the financial plan successfully.



The Trinitas Classical Academy board members have the collective qualifications and capacity to implement the school's financial plan successfully. The board includes individuals with extensive experience in education, business, and finance:

- Boen Nutting, Ed.D. has over 20 years of experience in public education, including serving as a principal, assistant superintendent, and adjunct professor. She has a strong background in strategic planning, communications, and financial management in school districts. (Non-Board Member - Leader of the school)
- Joe Higgins has a diverse entrepreneurial background. He has founded and led several successful businesses, including the fast-growing Leman Academy of Excellence charter school chain. He has experience in site selection, real estate development, financing, and public policy for charter schools.
- Mark Lockman has extensive experience in real estate development, project management, and business operations. He has developed large-scale mixed-use projects and managed construction budgets. He oversaw the founding of Davison Day School, which had over 1,900 K12 students.
- Susan Tillis has over 15 years of experience as a broker and branch leader in real estate. She has a strong background in marketing, sales, and community engagement.
- Mikail Clark is an experienced M&A attorney who has advised clients across various industries, including healthcare, manufacturing, and real estate, on complex business transactions and corporate governance matters. His background in securities law and experience with private equity and private placement matters would be valuable in managing the financial aspects of operating a charter school.
- Dr. Walter C. Tribolet is a highly qualified operations executive with a proven track record of turning around underperforming organizations and driving profitable growth. His expertise in cost efficiency, P&L oversight, and process redesign would be crucial in implementing a sound financial plan for Trinitas Classical Academy. Dr. Tribolet's experience in managing large budgets, negotiating contracts, and leading organizational restructuring would be directly applicable to the financial management of a charter school.

The assembled board has the qualifications and capacity to successfully implement Trinitas Classical Academy's financial plan. Their complementary legal, financial, and operational management skills would enable them to oversee the school's financial operations effectively, ensure compliance with regulations, and make strategic decisions to ensure the school's long-term financial sustainability.

Q240. Describe how one or more high needs students with disabilities might affect the budget and your plan to meet student needs that might be more than anticipated.

The Trinitas budget reflects an anticipated EC (students with disabilities) population of 9%. Our revenue from state and federal sources reflects the cost of service to these students. Should we have an enrollment of EC students greater than our projected amount, our school Principal will look at the following options to address possible financial shortfalls:

- Ensure they have the necessary expertise, resources, and services to properly identify, evaluate, and accommodate students with disabilities in accordance with federal laws.
- Develop partnerships with special education providers and experts to build their capacity to serve students with a wide range of needs. Contractor EC services can and will be used as needed.
- Proactively recruit and retain qualified special education teachers and staff. Ensuring we have a strong staff in place who are able to handle demand increases will be important. Adding ED assistant teachers may be an economical option to handle our EC population.
- We closely monitor enrollment and classification data to ensure students with disabilities are properly identified and the services we provide match their IEP or 504.
- Apply for additional federal grants to handle needed services.
- Look to the community for options to provide wrap-around services to the EC students. This may include contractors who can provide services and bill the students' medical insurance. These services would occur before or after school.

Q241. If there is a plan to outsource any or all financial management areas such as payroll, benefits, audits,



fundraising, accounting, etc., provide a statement on how the vendors will be selected and how the board will oversee their activities to ensure fidelity and compliance.

Trinitas Academy will outsource the following services to North Carolina-based firms with experience in public education:

- Payroll – Benefits
- Annual Audits
- Monthly Financial Statement Reconciliation and board reporting (Accounting)
- We are determining the need to outsource busing, janitorial, and landscaping.

The Finance Committee of the Governing Board will establish a protocol for contracting and oversight of these vendor relationships. The guiding principles of these contracting protocols will include:

The Finance Committee shall consist of at least two Directors, one of whom shall be the Board's Treasurer and the Principal and School Principal. As part of the development of the policies and procedure policy, the following framework will be part of the finished manual:

1. Establishment of a Purchasing Policy - The Principal's may authorize expenditures and may sign related contracts within the approved budget. The Governing Board must review all expenditures in the form of a detailed Profit and Loss. The Governing Board must also approve contracts over \$5,000.
2. Human Resources, Travel, Record Keeping, Tax Withholding, Expense Reporting, Governing Board Expenses, Financial Institution Selection, Record Retention, Insurance Minimums and Coverage, Bond or Lender Reporting and Management, and Asset Management are all policies that will be established by the Governing Board and executed by the Principals.
3. Petty Cash and Credit Card Use Policy will be established using a framework that is generally acceptable to Charter School cash handling procedures.
4. See Question 242 - Contracting Policy

The Governing Board will commission an annual financial audit by an independent third-party auditor who will report directly to them. The Governing Board will approve the final audit report, and a copy will be provided to NC DEI. Any audit exceptions and/or deficiencies will be resolved to the satisfaction of the Governing Board and the charter-granting agency. The Governing Board will annually appoint an audit committee by January 1 to select an auditor by March 1 before year-end (June 30th). Any persons with expenditure authorization or recording responsibilities within the school may not serve on the committee. The audit shall include, but not be limited to:

1. An audit of the accuracy of the financial statements
2. An audit of the attendance accounting and revenue accuracy practices
3. An audit of the internal control practices

[1] National Charter School Resource Center

Q242. 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.



Contracting Board Policy Framework:

In North Carolina, charter schools are not required to use competitive bidding for professional service contracts, such as accounting and legal. Instead, they should select providers based on demonstrated qualifications, competence, and fair and reasonable prices, as outlined in Chapter 143 of the North Carolina General Statutes.

For other goods and services contracts that do not fall under public works or professional services, such as student accounting, custodial services, or instructional support, charter schools are not required to bid competitively. It will be our practice for the Governing Board to have policies and procedures (see below) for approving contracts above a certain dollar amount.

When using federal funds, charter schools must follow the procurement standards in 2 CFR 200, which include avoiding conflicts of interest, only awarding contracts to responsible contractors, maintaining detailed procurement records, and considering the most economical approach.

Proposed Board Policy On Contracting:

Consideration of in-house capabilities to accomplish services before contracting for them will be considered. Office staff will keep and maintain a contract file evidencing the competitive bids obtained (if any) and the justification of the need for any contracts over \$5,000. (Competitive bids will be obtained where required by law or otherwise deemed appropriate and in the school's best interests.) Written contracts clearly define the work to be performed and will be maintained for all contract service providers (i.e., consultants, independent contractors, subcontractors). Contract service providers must show proof of being licensed and bonded, if applicable, and of having adequate liability insurance and worker's compensation insurance currently in effect. The Principal's will approve proposed contracts and modifications in writing. Contract service providers will be paid in accordance with approved contracts as work is performed. The Principal's will be responsible for ensuring the terms of the contracts are fulfilled. Potential conflicts of interest will be disclosed upfront, and the Principal's and/or Member(s) of the Governance Board with the conflict will excuse themselves from discussions and from voting on the contract.[1]



Q243. Explain how the budget aligns with the school's mission, curricular offerings, transportation plans, and facility needs.

Academic Rigor (*Mission: Our school focuses on rigorous academics, character formation, and civic responsibility.*)

- Invest in high-quality curriculum and instructional materials to support rigorous academic standards.
- Allocate resources for student assessments (NWEA Map), data analysis, and academic intervention programs to monitor and support student learning.

Teacher Training and Compensation (*Mission: We believe in empowering, equipping, and training our teachers with tools and support to instill a lifelong love of learning in our scholars.*)

- Offer competitive teacher salaries and benefits to attract and retain high-quality educators.
- Provide extensive teacher professional development to ensure effective curriculum and instructional strategies implementation. Our budget reflects the hiring of instructional coaches in year one to implement our proposed professional development plan.
- Dedicate funding for ongoing teacher training, coaching, and collaboration to continuously improve instructional practices.
- Provide opportunities for teacher leadership and career advancement to foster a strong, motivated teaching staff, including a stipend budget for the Opportunity Culture teacher as mentor program in year 2.

Transportation

- Budget for reliable transportation services, such as bus routes or rideshare programs, to ensure all students can access the school, regardless of their location or socioeconomic status

Facilities

- We have a secure, suitable, well-equipped facility that can accommodate the school's enrollment and Classical Education program needs. Our facility has had extensive upgrades, accommodates our needs as we grow our population, and is centrally located for our families.
- Allocate resources for facility maintenance and utilities to keep the campus looking its best.

Q244. What percentage of expenditures will be the school's goal for a general fund balance? Describe how the school will develop the fund balance.

Our budget reflects an ongoing general fund balance that grows each year. We are planning on a \$395,340 fund balance in year one, with an increase each subsequent year. This surplus gives our school options should unforeseen issues arise.

The budget narrative reflects choices our team made on specific line items that are higher than we expected. We built a conservative budget based on our projected enrollment.

Q245. Provide a description of proposed financing structure. Include financing of facilities, other asset financing, and leases.



The proposed financing structure for the school facilities involves a percentage lease agreement that includes \$700,000 to prepare the school for opening and initial capital costs. This approach allows the school to access the necessary funds without taking on significant upfront costs.

The key elements of the financing structure are:

- **Percentage Lease Agreement:** The school will enter into a lease agreement where a percentage of the school's revenue is paid to the leasing entity. This provides the school with access to the required capital without having to take on debt directly.
- **\$700,000 for Preparation and Initial Costs:** The lease agreement includes \$700,000 to cover the costs of preparing the school for opening and the initial capital expenditures needed to get the school operational.
- **Option to Buy and Refinance:** The agreement includes an option for the school to eventually purchase the campus and refinance it through the bond market. This allows the school to transition to owning the facilities when the timing is right for both the school and the financial markets.
- **This financing structure leverages the percentage lease model to provide the school with the necessary capital upfront while also giving the school the flexibility to purchase and refinance the facilities through the bond market eventually. Including the \$700,000 for preparation and initial costs ensures the school has the resources needed to prepare the facilities for opening and operation.**

A foundation commitment of \$100,000 for general purposes is not reflected in the budget but is available to the school.

The school may lease office equipment, such as copiers, which are line items reflected in the budget.

The school has not determined how it will manage busing. We are currently reflecting an annual cost in the budget for busing. This will either be contracted to a local bus company or purchased and managed internally.

Q246. 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.

There are no assets committed or needed other than the building and equipment reflected in the proposed lease.

13.3. Financial Compliance

Q247. How will the school ensure adequate internal controls, including segregation of duties, safeguarding of assets, accurate and adequate record keeping?



Trinitas Academy has established robust internal controls and financial oversight mechanisms to ensure the proper safeguarding of assets, accurate record-keeping, and compliance with state regulations.

First, the school has segregated financial duties to prevent any single employee from having sole control over cash receipts, disbursements, payroll, and bank account reconciliations.

All financial documentation will be completed electronically to maintain proper records.

The Principal is responsible for authorizing expenditures and signing contracts within the approved budget, but the Governing Board must review all expenditures and approve any contracts over \$5,000.

The school will also establish clear policies for human resources, travel, record-keeping, tax withholding, expense reporting, and other financial procedures.

Regarding student records, the school will use the Schoology platform to maintain accurate and up-to-date student information, including attendance, grades, and other academic data. All records will be kept in PowerSchool/Schoology. The Office Manager will play a key role in ensuring proper attendance reporting and compliance with state requirements.

The EC (Special Education) department will use a cloud-based, nationally recognized electronic records service such as iEP Pro to manage IEPs and 504s. This service will receive all notes, minutes of services, progress notes, and parent communication.

Governing Board Oversight

The school has also established a Finance Committee, consisting of at least two Directors and the Principal, that will meet at least twice per year to prepare annual budgets, coordinate the annual audit, and develop long-term financial plans for the Governing Board's consideration.

The Governing Board will commission an annual financial audit by an independent third-party auditor, who will report directly to the Board. Any audit exceptions or deficiencies will be resolved to the satisfaction of the Governing Board and NC DPI.

The school will have an internal accounting and record-keeping process that will transition to quarterly reporting by an external accountant, followed by an annual audit presented to the Governing Board and the State of North Carolina.

The Governing Board will be crucial in overseeing the school's financial health, monitoring enrollment, reviewing budgets, and establishing financial policies and procedures.

Q248. Provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

There are no related-party transactions between the governing board and the school. All services or products provided to the school by any board member will be provided by volunteers or pro bonos.

Q249. Provide the name of the firm approved by the NC Local Government Commission (LGC) that will conduct the audit. Include the complete mailing address, telephone number, and fax number. If a firm has yet to be identified, please list the firms the board has investigated.

Sharp Patel CPA

325 Arlington Ave
Suite 630
Charlotte, NC 28203
704-499-3893

13.4. Certify



Q250. I certify that this subsection is entirely original and has not been copied, pasted, or otherwise reproduced from any other application.

- Yes
- No

Q251. Explanation (optional):



14. Other Forms

Q252. [Sign the attached Charter School Required Signature Certification document and upload it as a PDF or image file.](#)

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Applicant Comments :

Signed by a quorum of board members (5) - added 5-20-24

Resources


Charter School Required Sig...

Applicant Evidence :


Signed - Election of Attorney...

Uploaded on **5/20/2024** by **Joe Higgins**



15. Third-party Application Preparation

Q253. Was this application prepared with the assistance of a third-party person or group?

- Yes
- No



16. Application Fee

Pursuant to G.S. 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 **April 26, 2024, at 5:00 pm EDT** for Fast Track and Accelerated applications, and **April 26, 2024, at 5:00 pm EDT** for traditional timeline applications. Payments will be accepted in the form of a certified check. Cash nor credit cards are accepted.

Q256.*Application Note: The applicant must mail the certified check or money order along with the Application Fee Payment Form (see the resources to download Payment Form) before or on the due date of April 26, 2024, at 5:00 pm EDT.

Payments should be made payable to the North Carolina Department of Public Instruction: North Carolina Department of Public Instruction Office of Charter Schools 6307 Mail Service Center Raleigh, NC 27699-6307

I understand

Resources


2024 Payment Form.pdf

Applicant Evidence :


Trinitas - Cashier Check - Tr...

Uploaded on **4/19/2024** by **Joe Higgins**



17. Signature page

Q257. Fill out the attached resource and get it signed and notarized. Then upload as a PDF or image file.

Upload Required File Type: pdf, image Max File Size: 30 Total Files Count: 1

Resources


Signature Page.docx

Applicant Evidence :


Trinitas - Mark Lockman - N...

Uploaded on **4/17/2024** by **Joe Higgins**

Q258. Board chair, please digitally sign your application here.
Signature



Applicant Evidence :


Q258 Board Chair Signature ...

Uploaded on **5/21/2024** by **Joe Higgins**

Final Status

Reject Approve

Approver Comments



**Academic
School Year**

Grade Levels

**Total Projected
Student Enrollment**

Year 1	K5	468
Year 2	K6	598
Year 3	K7	728
Year 4	K8	832
Year 5	K8	884

Ethnicity/Race	# of Students	Percentage (%)
American Indian or Alaska Native	8	1%
Asian	39	4%
Black or African American	88	9%
Hispanic	63	7%
Native HI or Pacific Islander	0	0%
Two or More Races	36	4%
White	693	75%
EDS Subgroups	220	100%
Economically Disadvantaged Students	72	33%
Students with Disabilities	106	48%
English Language Learners	42	19%
Students Experiencing Homelessness	0	0%

In the first year, we will reserve 78 seats for each grade up to the 5th grade. The full capacity will be 104 students per grade, allowing for 4 sections for each grade. We expect an increase in enrollment for the upper grades (6th to 8th) in the following years. Our team's experience indicates a strong demand for enrollment from Kindergarten to 3rd grade, with students progressing from grade to grade and additional enrollment from transferring students in the area and increasing migration each year. Our marketing budget, detailed in the operational budget, is designed to achieve these enrollment targets.

	Year 1	Year 2	Year 3	Year 4	Year 5
Kinder	78.00	104.00	104.00	104.00	104.00
1st	78.00	104.00	104.00	104.00	104.00
2nd	78.00	78.00	104.00	104.00	104.00
3rd	78.00	78.00	104.00	104.00	104.00
4th	78.00	78.00	78.00	104.00	104.00
5th	78.00	78.00	78.00	78.00	104.00
6th		78.00	78.00	78.00	104.00
7th			78.00	78.00	78.00
8th				78.00	78.00

Trinitas Classical Academy

Mt Mourne



TRINITAS ACADEMY

Classical Education - North Carolina

Classical Education

- Charlotte Mason
- Character Education
- Home School Inclusion



Trinitas Academy

Classical Charter

Kinder To 8th
Grade

Mt Mourne School

12 acre campus
60,000 sq ft base
Playground –
full size gym – fields

Character Education Focus

**Full digital learning
available as a resource**

Homeschool Inclusion

After School

Virtue Based STEM
Tutoring - Explore Partnerships
(Boys and Girls, Girl Scouts etc.)

Every day from 3 to 6
Three class periods
Fun, Sports, Hands on
Value Virtue focus in alignment
with the school
Parent pay or sliding scale

Athletics

Starting in 5th Grade

Boys and Girls
Track
Volleyball
Basketball
Flag Football
Soccer

Opening 2025

K6 year 1
K8 year 3

Dr. Boen Nutting
Principal

Governing Board

- Walter Tribolet
- Clark Mikail
- Susan Tillis
- Will Bowen
- Judge Marcus Long
- Mark Lockman
- Anthony Famiglietti



Mt Mourne 100 Year History



Mrs. Eunice J. Johnston
Teacher - Fourth Grade

MT. MOURNE ELEMENTARY SCHOOL
Mt. Mourne, North Carolina
1964-65

James P. Pines
Principal



School's Mission:

At Trinitas Classical Academy, our mission is to support a **diverse scholar population** a foundation in education to prepare them for the future. Our school focuses on **rigorous academics, character formation, and civic responsibility.**

Our school will **partner with parents** to provide the time-tested Charlotte Mason and Classical Education academic model. We believe in **empowering, equipping, and training our teachers** with tools and support to instill a lifelong love of learning in our scholars.



TUITION FREE
CLASSICAL EDUCATION

Kinder to 8th
Public Charter School

- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts - Socratic Learning - Athletics
- ⇒ Empowered Teachers

Virtue Safety Athletics Family Connection

*Pending Approval From The State of North Carolina

LEARN MORE AT: TrinitasSchools.org

School's Vision:

The vision of Trinitas Academy is to hold our leaders, teachers, and students to the highest level of integrity and accountability. We model what we teach. We embed character development in everything we do. We expect what we model. Our vision statement was formulated by reaching back into history and modeling the great thinkers and leaders on the character attributes that we look to teach and model in our schools:

Courage (Aristotle)

"Courage is the first of human qualities because it is the quality that guarantees the others."

Curiosity (Einstein)

"It is a miracle that curiosity survives formal education."
Curiosity, makes the acquisition of knowledge and wisdom long-lasting.

Humility (Aquinas)

"Where there is humility, there is wisdom"

Gratitude (Cicero)

"Gratitude is the parent of all other virtues – which allows us to seek what is Good, True and Beautiful."

Dignity (Martin Luther King Jr.)

Every man [human being] is an heir to a legacy of dignity and worth.

Justice (Gandhi)

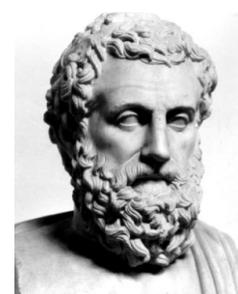
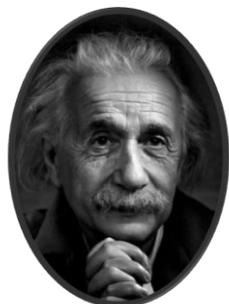
"Truth never damages a cause that is just."

Fortitude (Locke)

"Fortitude is the guard and support of other virtues."

Responsibility (Abraham Lincoln)

"You cannot escape the responsibility of tomorrow by evading it today." What matters is measured.



3

Trivium: Latin term for the meeting place of three roads. Grammar – Logic – Rhetoric

4

Time Periods : Ancient (1st, 5th, 9th), Medieval, (2nd, 6th, 10th) America's Founding (3rd, 7th, 11th) Modern (4th, 8th, 12th)

3

Time Periods : Repeated 3 Times

7

The 7 liberal arts comprise the trivium and quadrivium: a set of 3 core skills, taught first, followed by 4 more advanced subjects. Arithmetic, Geometry, Music (Arts), Astronomy

20

Values and Virtues: Focus on specific virtues that defined Western Thought. Pinnacle – **Truth Beauty Goodness**

What Is Classical Education

What Is Classical Education?

Perfected Over 1100 Years,
Rooted In The Great Works of
Literature, Arts, History, Mathematics and Science,
Classical Education Is A Fit For Families All Over America.



1 Pillars of Classical Ed

Teach Values and Virtues

Through great works of literature, art, music, math and scientific advancements from a historical view.

Natural Education Transitions

The Trivium - Education progression along the child's developmental stages. From Grammar to Logic To Rhetoric.

Interwoven Subjects

Subjects based on a year long, in depth study of a time period in history

Deeper Dives Into Learning

Explore in depth, the Society, Politics, Religions, Intellectual Advancements, Technology, Economics of societies from Ancient to Modern. Socratic Instruction and Source Document Analysis. Much More Than Dates and Facts.

Rigorous Academics

Heavy emphasis on writing, oratory and literature interpretation skills.

Pursuit of the Good, True and Beautiful

2 Pillars of Ethos Logos Program

Partner closely with the Parents. Learning Starts at the Home.
SCHOOL is in ALIGNMENT with the HOME.

Teachers are the Authority in the Classroom.
Careful Hiring, Training and Support of Teachers is our Culture.

Encourage Excellence and not Perfection.

Discipline based on the works of Dr. Rudolf Druikurs, and Adlarian psychologist. Encouragement and relationships are the key to discipline and learning.

Focus on Character Education, Social/Emotional Learning is EQUAL to the Focus on Academics.

Learn from History, Embrace Our Past, Understand Today, Prepare for tomorrow.



What Is Classical Education?

3 Three Stages of Learning The Trivium



Grammar Stage K-3

Heavier on Direct Instruction
Instill WONDER.
Math Facts
Grammar Rules
Recitations of Poetry
Beginning Socratic



Logic Stage 4-6

Scholars Start Asking 'Why?'
Connecting Facts with Ideas
Deeper Dive Into Concepts
Awareness of Others
The Good, True and Beautiful
Heavier Socratic Base



Rhetoric Stage 7-12

Socratic Discussions
Strong Verbal and Writing
Critical Thinking
Linking Past to Today
Capstone Projects
Personal Beliefs Explored

Concentration of the Trivium: Tools of Learning along natural transitions

Grades K-5	Grades 5-8	Grades 8-12
Grammar Foundational Learning Beginning Latin Mathematics Concepts Memorize – Language Rules Oration via Recitation	Grammar	Grammar
Logic	Logic Asking 'Why' Stage Making sense of facts String together concepts Connecting across subjects Written & Oral Skills	Logic
Rhetoric	Rhetoric	Rhetoric Socratic Stage Reasoning – Persuasion Draw upon Grammar/Logic Internalization of Learning Advance Oral and Written

Shaded boxes are the dominant, but not exclusive, tools and techniques used for instruction. During each stage, all the subjects are taught (Math, Science, English, History, Fine Arts).



FACT: The Trivium Was Introduced In The Middle Ages
Stages Naturally Progress Along The Child's Development Levels.

What Is Classical Education?

4 History Time Lines Year Long - Thematic Units



Ancient Times 1st - 5th - 9th Grades

Formation of Civilizations
 Egypt - Mesopotamia
 Ancient China - Confucius
 Abraham - Moses
 Babylon - Phoenicians
 Greek Culture
 Aristotle - Plato - Socrates
 Rise and Fall of Rome
 Christianity Starts



Medieval Times 2nd - 6th - 10th Grades

After The Fall of Rome
 Magna Carta
 The Rise of The Church
 Knights and Samurais
 Vikings Norsemen
 Islam Begins
 Ottoman Empire
 Reformation - Martin Luther
 Renaissance - The Masters



America Founding 3rd - 7th - 11th Grades

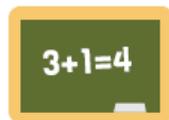
Age of Exploration
 America Colonized
 American Revolution
 Founding Fathers
 Constitution - Bill of Rights
 French Revolution
 Industrial Revolution
 Slavery Injustice
 Civil War Divides The Nation



Modern Times 4th - 8th - 12th Grades

Reconstruction
 Manifest Destiny
 Roaring 20's
 Great Depression
 World War 1 and 2
 Russian Revolution
 Communist China
 Cold War - Space Race
 Vietnam to 9/11

5 Interwoven Disciplines



Art - Music
Big Ideas
Great Literature
Values and Virtues
Great Men and Women

Rise & Fall of Civilizations
Inventions & Inventors
Astronomy
Science Advancements
Bio/Chem/Earth/Physics

Culture of the Day
Major Religions
Governments
Philosophers
Economies

What Is Classical Education?

6 Character Development Values and Virtue Education



Critical Thinking

Equip our Scholars with the Tools to decipher RIGHT from WRONG

CHALLENGE what is Presented with VERBAL and WRITING Proficiency

The Art of DEBATE Using Logical and Reason



Awareness of Others

Through the GREAT BOOKS, Scholars EXAMINE Character Through The Power of Story.

Awareness of Others -
The Golden Rule
The Golden Mean

Appreciation of the GOOD - TRUE - BEAUTIFUL



Life Long Learners

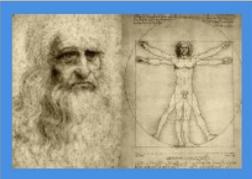
Instill WONDER and a JOY of learning by Making HISTORY come ALIVE.

Spark CURIOSITY
Go DEEPER as opposed to WIDER into Subject Matter.

Hands on Learning in the Arts, Music, Science and Athletics

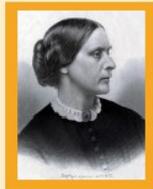
What Is Classical Education?

7 Classically Educated People from History



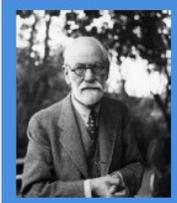
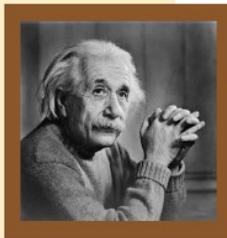
Renaissance

Leonardo daVinci
Copernicus
Martin Luther
Galileo
Christopher Columbus
Isaac Newton
Gutenberg
Shakespeare
Edgar Degas
Montesquieu



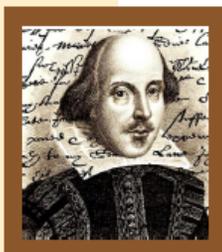
Founders

Samuel Adams
John Adams
James Madison
Thomas Jefferson
Alexander Hamilton
Susan B Anthony



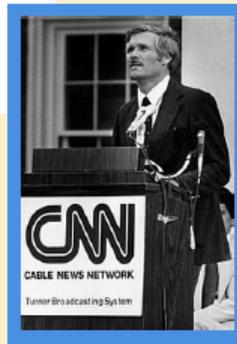
Writers and Thinkers

Fredrick Douglas
J.R.R. Tolkien
JK Rowling
Charles Darwin
Max Planck
C.S. Lewis
Sigmund Freud
W.E.B. Dubois (NAACP)
Nietzsche Voltaire
Emily Dickinson



Moderns Leaders

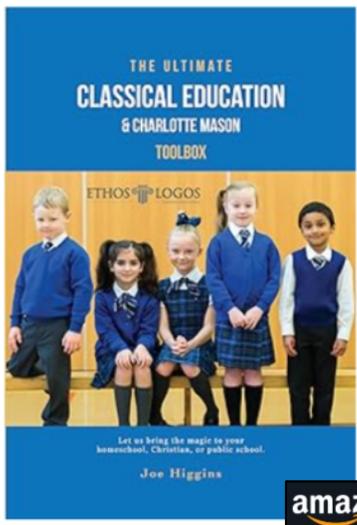
Albert Einstein
Dr. Martin Luther King
Alfred Hitchcock
Joe Paterno (Penn State)
Ted Turner (CNN)
Vince Lombardi
Pres. Calvin Coolidge
Pres. James Garfield
Pres. William McKinley
Pres. Woodrow Wilson



Ethos Logos Curriculum

ETHOS  LOGOS
— Classical Curriculum

Homeschool Inclusion



The Ultimate Classical Education and Charlotte Mason Toolbox

\$9⁹⁵ ~~\$19.95~~ (50% off)

Kindle Edition

See all details

A screenshot of the Amazon storefront for Ethos Logos. The top navigation bar includes "amazon prime", "Delivering to Tucson 85718", "Update location", "All Search Amazon", "EN", "Hello, sign in Account & Lists", and "Returns & Orders". The main banner is identical to the one at the top of the page. Below the banner is a navigation bar with "ETHOS LOGOS", "+ Follow", "HOME", "LESSON CARDS", and "MORE". A search bar is also present. The bottom section features two promotional tiles: "SHOP BY SUBJECT" with an image of two women looking at books, and "VALUES VIRTUES" with the Ethos Logos logo.

Values & Virtues

Great Men & Women Theory of History

VALUES & VIRTUES

Respect



GIVE RESPECT

EARN RESPECT



"I cannot conceive of a greater loss than the loss of one's self-respect."
- Mahatma Gandhi

ETHOS LOGOS

K12 - 1

VALUES & VIRTUES

Resolution - Perseverance
Grit



Have you turned any of your dreams into reality?
How have you dealt with failure? Have you been able to bounce back from it?
Do you keep a positive attitude during difficult situations?
Do you like to take on easy tasks or big challenges?
How hard do you push yourself to get things done?

ETHOS LOGOS

GREAT MEN & WOMEN

César Chávez
1927 - 1993



Chávez' motto was "Sí, se puede," translating as "Yes, we can."

"We do not need to kill or destroy to win. We are a movement that builds and not destroys."

ETHOS LOGOS™

VALUES & VIRTUES

Humility



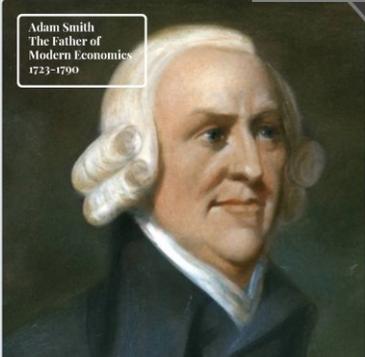

"Humility is the solid foundation of a..."

ETHOS LOGOS

K12 - 4

GREAT MEN & WOMEN

Adam Smith
The Father of Modern Economics
1723 - 1790



"It is not from the benevolence of the brewer, or the baker that we expect our bread, but from their regard to their own interest."

ETHOS LOGOS™

VALUES & VIRTUES

Generosity




Dorothy Gale is the very essence of giving and generosity. Selfless, always thinking of others and after her great adventure, she is taken home.

ETHOS LOGOS

K12 - 8

GREAT MEN & WOMEN

Hattie McDaniel
1893 - 1952



You can best fight any existing evil from the inside."
- Hattie McDaniel

- ★ Actress and radio performer Hattie McDaniel became the first African American to win an Oscar in 1940 for her supporting role as Mammy in 'Gone With the Wind.'
- ★ After Hattie McDaniel became the first African-American to win an Academy Award for her role in 'Gone with the Wind' she was accused of being an Uncle Tom by the NAACP; to which she responded that she would 'rather make seven hundred dollars a week playing a maid than seven dollars being one'.

ETHOS LOGOS™

Middle School Reading Program

ENGLISH – 8TH

Night by Elie Wiesel



NIGHT

Time and Place
Dehumanization is the process by which the Nazis gradually reduced the Jews to little more than "things" which were a nuisance to them. Why, and how does this phenomenon occur?
Discuss why you think the townspeople remained complacent despite the advance of the Nazi army. In the book, there were several discussions about resistance had by the prisoners. Why do you think there was no large-scale effort to resist?

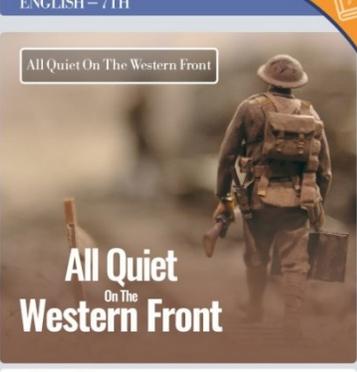
About The Author

- Do the events that Elie has survived shape him into a stronger individual?
- What kinds of hope does Wiesel offer us?
- Many characters in *Night* are transformed into brutal savages due to the inhumanity of their experience. Does Elie himself escape this fate?
- Why is it essential for Wiesel's story to be told?
- Wiesel ends the novel with "I cover myself back at me, the look in his eye, as they do. What is the meaning?"

8-8,7 ETHOS LOGOS

ENGLISH – 7TH

All Quiet On The Western Front



All Quiet On The Western Front

Time and Place
Why is 'All Quiet on the Western Front' an anti-war novel?
Are the heroes of 'All Quiet on the Western Front' able to maintain their humanity during the war?
Does war enhance positive or negative human qualities in the novel?
What characters of the novel got some temporary benefits from war and in what way?

About The Author

- Why did the Nazis party chose to burn Remarque's book early in their rise to power?
- How was the author's life changed by his personal experience in WWI?
- What is Remarque's purpose in the novel?
- Explain how dehumanizing war is a key idea the author is trying to share.

8-4,5 ETHOS LOGOS

ENGLISH – 8TH

Huckleberry Finn



HUCKLEBERRY FINN

Time and Place
Discuss the various representations of "rational justice" shown in the novel. What do you think is Mark Twain's assessment of taking the law into one's own hands?
There is a history of censorship of the novel going back 100 years. What were the arguments over time to censor this book?
Is *Huckleberry Finn* relevant today? What does it teach modern readers about race in the past and today?

About The Author

- Discuss Huck's attitudes toward "civilization" and how Twain reinforces these attitudes through various characters in the novel.
- Mark Twain makes masterful use of satire and irony in his novel. Discuss examples of satire and irony in the novel, and explain what Twain is satirizing in the particular episodes. How do these satirical episodes contribute to the overall theme(s) of the novel. What is the most important message of the novel?
- What lessons does Twain try to teach about society? Are they still relevant today?
- Twain gives us two lengthy examples of senseless violence in the novel. Explain what Twain is saying about the human race in these incidents. Is Twain's goal still valid today? Give some examples from modern society to back up your point.

ETHOS LOGOS

ENGLISH – 8TH

Red Badge of Courage



RED BADGE OF COURAGE

Time and Place
How does the novel grapple with the brutality of the Civil War as a way to teach courage and masculinity?
Since the book was written post Civil War, how do you think the themes and characters helped heal the nation?
Was the Civil War worth the lives and destruction?
How do you think the characters were forever changed by growing up as

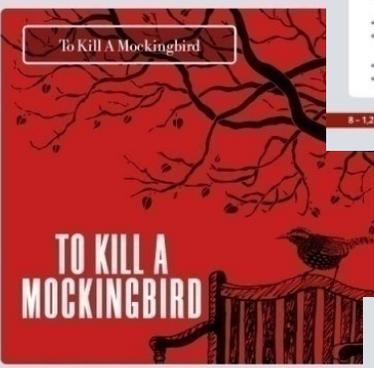
About The Author

- 1895 by Stephen Crane, a novelist, poet, and journalist used his naturalist style to balance inner lives of characters as they interact with difficult environments.
- Why is Stephen Crane's message about war, and its impact on young men?
- Why did Crane choose to name his book, *Red Badge of Courage*?

8-3,4 ETHOS LOGOS

ENGLISH – 8TH

To Kill A Mockingbird



TO KILL A MOCKINGBIRD

Time and Place
How does the Great Depression relate to the book "To Kill a Mockingbird"?
How do the historical events connect – directly or indirectly – with the theme Harper Lee writes about in the novel?
Is "To Kill a Mockingbird" a timeless classic? Explore the issue of race in the novel and how they may relate to today.

About The Author

- Do you think the author was influenced by real-life events when she wrote her work of fiction?
- How does Harper Lee engage the reader through narrative voice in the novel?
- Why is naming "To Kill a Mockingbird" wrong?

8-6,7 ETHOS LOGOS

ENGLISH – 7TH

The Witch Of Blackbird Pond



THE WITCH OF BLACKBIRD POND

Time and Place
How were women viewed differently in the late 1600s? The role of religion plays a major role in the novel. What historical events impacted colonial religion?
How did the people believe to be witches in the 1600's in New England?
How were Quakers treated in England and in America?
How was witchcraft used to make sense of hardships in the early colonies?
How do you think the people of Wethersfield or understand why they were afraid of "witches"?

About The Author

- How did the author show the pain and ugliness of the time period in this novel?
How do you think the author's message about prejudice is still relevant today?
How do you think the author's message about prejudice is still relevant today?
How do you think the author's message about prejudice is still relevant today?

ETHOS LOGOS

ENGLISH – 8TH

1984



1984

Time and Place
Do you think that there are some significant similarities between Oceania in 1984 and today?
How is paranoia and propaganda used to control the masses in the novel? In today's world? How is this paranoia achieved?
Some of the surveillance technologies that appear in 1984 are now realities (CCTV, GPS Devices etc.). Discuss the use of technology to control public and private behavior in 1984 and in the present.

About The Author

- If you were George Orwell, would you be pleased or displeased with the world political scene today?
- Discuss the elements and examples of history that influenced Orwell in his writing of the novel 1984.
- What is the choice that Orwell presents to us readers from this novel? Does he suggest a choice that he would want us to make?

8-9,10 ETHOS LOGOS

ENGLISH – 7TH

Scarlet Pimpernel



Scarlet Pimpernel

Time and Place
As a historical novel, what is occurring in Europe during the time of this novel and how are the events depicted through the characters in the book?
From the novel, do you sympathize with the people of France or the revolutionaries or the nobility?

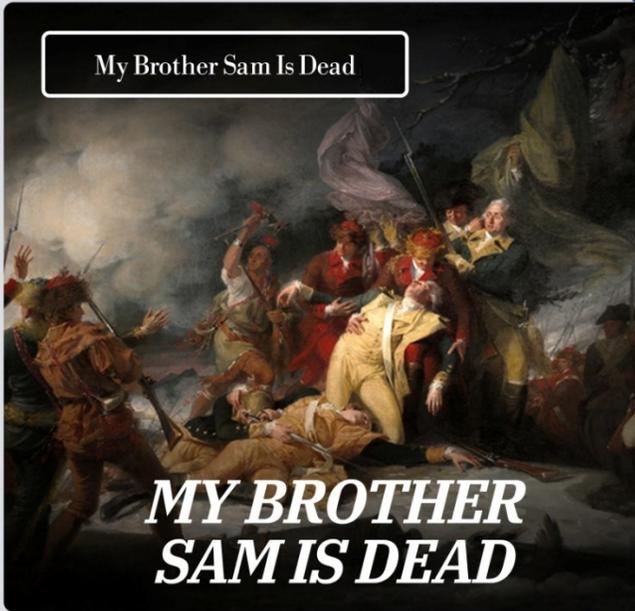
About The Author

- Research the historic accuracy of Orczy's work as it relates to the French Revolution. What times and places are historically accurate?
- What did Orczy have unanswered with respect to the lead up to the French Revolution?
- Orczy's heroine is brave and noble character. Discussing during here with a secret identity. Can you think of some modern day super heroes that have similar characteristics? How are they similar or different?

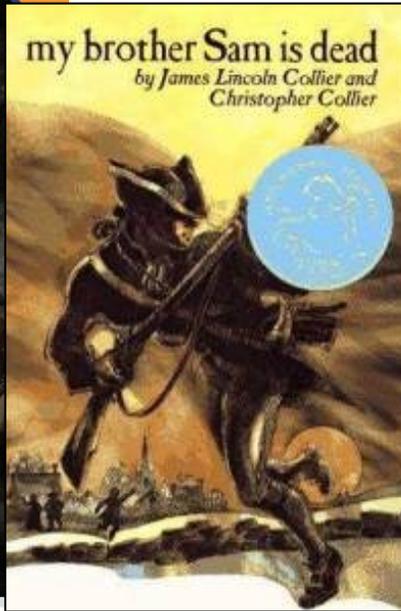
7-7,8 ETHOS LOGOS



My Brother Sam Is Dead



MY BROTHER SAM IS DEAD



Time and Place

What is the difference between a Tory and a Patriot? From history, what was going on at the time of this novel in America?

Tim remains on the fence regarding the Patriot/Tory conflict throughout the novel. Which way do you think he is leaning at the end of the story?

Who are the Continentals, and why do they come to Redding? As you read this novel, what conclusions did you draw about how war affects people? What conclusions did you draw about the American Revolutionary War?

About The Author

- ★ Why does the author spend so much time showing the reader what Tim thinks about Sam's clothes, manner of speaking, and accomplishments?
- ★ This book was written by James Lincoln Collier and Christopher Collier, how do you think their relationship, real or imagined, played out as they wrote this book? Give examples.

7 - 6,7



Call Of The Wild



The Call Of the Wild

Time and Place

What historical setting does Call of the Wild take place?

What geographical areas does the story take place?

About The Author

- ★ Who was Jack London? What's his background?
- ★ Why did London write this book?
- ★ How was the book received? Was it controversial?

7 - 1-2

PHYSICS—SIMPLE MACHINES

Simple Machines
Pulleys, Levers, Ramps, Screws

Big Discussion or Debates

What do Simple Machines do?
What is a Rube Goldberg Machine?
Look for and observe/explain some simple machines in your everyday life. When, who and where were the 6 simple machines first identified for use?

Big Question:

- Does a machine have to be electrical or powered by a motor?
- What is the purpose of a machine? Why do we use them?
- What constitutes "simple"?
- How did the Egyptians build the Great Pyramids thousands of years ago (2,500 BCE)?

4-3 ETHOS LOGOS

PHYSICS—THOMAS EDISON

Thomas Edison
American Inventor—Entrepreneur
1847-1931

"Genius is one per cent inspiration and ninety-nine per cent perspiration."
— Thomas Edison

Big Discussion or Debates

Starting in the late 1880s, Thomas Edison and Nikola Tesla were embroiled in a battle now known as the War of the Currents. What was this battle? Who won? What were the positives and negatives of each inventor's ideas? Are there character traits we see as Edison is growing up that foreshadow what type of inventor he will become? Being an inventor that can turn an idea into a business are two very different skills. What did Edison do better? Give some examples.

Big Question:

- How was Edison to work for?
- Did Edison have balance in his life? Can committed people have a balanced life?
- Research and list the top five inventors in history? How does Edison stack up to these inventors?

ETHOS LOGOS

SKELETAL SYSTEM

Skeletal System
Muscle and Bone

SKELETAL SYSTEM

MUSCULAR SYSTEM

Big Question:

- How have artificial joints changed the quality of life of people? Do you know anyone who has an artificial joint?
- What are some bone and skeletal-based diseases, and how are they treated?
- Research the discovery of bones from the past. What are the top five oldest? How do scientists determine how old a bone is?

5-7 ETHOS LOGOS

Biology
1st 5th 9th Grades

Earth Sciences
2nd 6th 10th Grades

Chemistry
3rd 7th 10th Grades

Physics
4th 8th 12th Grades

Simple Machines

The six simple machines are the basis for all mechanical devices. Simple machines are useful because they reduce effort or extend the ability of people to perform tasks beyond their normal capabilities. Investigate simple machines in your everyday lives. How do you calculate the formulas used with simple machines. Use diagrams and simple machines to explain, force, effort, and work.

Key Terms in This Unit

✓ Machine	✓ Wedge	✓ Kinetic energy	✓ Radiation
✓ Lever	✓ Screw	✓ Temperature	✓ Connection
✓ Pulley	✓ Effort	✓ Thermal	✓ Conduction
✓ Friction	✓ Friction	✓ Expansion	
✓ Gear	✓ Inclined plane	✓ Transfer	

Inventions and Breakthroughs

Printing press
Combustible and steam engine
Spinning Loom - Cotton Gin
Jet engine

The water wheel
The clock

Famous Scientists

Archimedes (287BC)
Charles Augustin de Coulomb (1736)
Franz Besselius (1629)
Henry Ford (1863)

★ ETHOS LOGOS VALUE/VIRTUE OF THE MONTH ★
Silence and Order



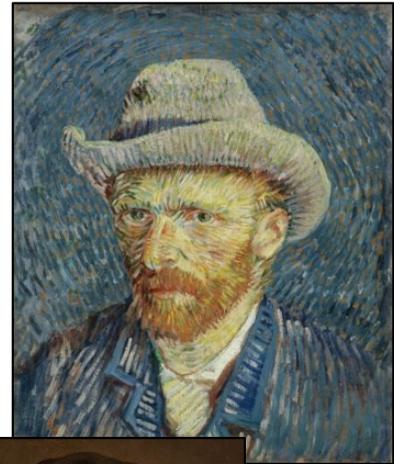
Artist – Musician Units Include:

25 Major Artists - 25 Major Composers

The arts help to identify transition of time in both social, political and economic stages. An historic perspective of the arts, allows students to gather knowledge and inspiration that eventually contributes to how they speak and view the world around us as a people.

Ancient cave drawings to Egyptian mummification
 Roman Architecture to Medieval Castles
 Religious art to the Renaissance
 DaVinci to Degas
 Jackson Pollack to Picasso

The arts are about expression of thoughts, intuitions, desires, and emotions. The history behind great works exposes scholars to different tribes and their cultures.



GREAT MUSICAL MOMENTS IN HISTORY

Tchaikovsky
1840-1893



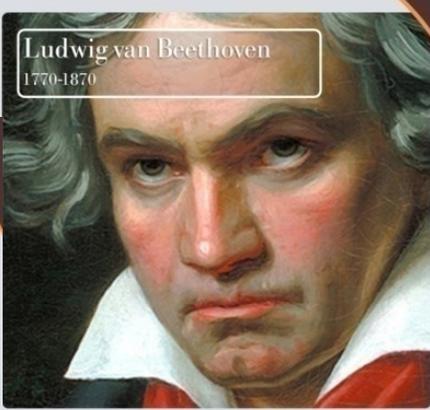
"Inspiration is a guest that does not willingly visit the lazy."
- Tchaikovsky

- He was a big fan of Shakespeare, he wrote many pieces inspired by his plays like Hamlet, The Tempest and Romeo & Juliet.
- "Swan Lake," "The Nutcracker" and "Sleeping Beauty" are his most famous works.
- The "1812 Overture," written in 1880, celebrates the Russian victory Napoleon. The original score called for 16 genuine cannon shots. Today, in America, fireworks are timed to the cannon blasts.

4-10 ETHOS LOGOS

GREAT MUSICAL MOMENTS IN HISTORY

Ludwig van Beethoven
1770-1870



"Tones sound, and roar and storm about me until I have set them down in notes." - Beethoven

- Beethoven became significant with the ideal of artistic originality and the image of the rebellious revolutionary genius.
- With his wild hair, disrespect for authority, and revolutionary music, Beethoven is often considered the world's first "rock star."
- The Voyager spacecraft carries a gold vinyl record that contains, among other great works, two pieces by Beethoven.

1-15 ETHOS LOGOS

ETHOS TOP 25 MUSIC

13 Ludwig Van Beethoven
Known as revolutionary, stretching musical forms to unleash emotion, and catapulting the Classical Era.

Facts About The Artist

- Beethoven's hearing started to decline around the age of 25, and by 27 years old, he heard constant buzzing. By age 46 he was completely deaf.
- Ear surgeons believe that Beethoven's wine was contaminated with lead might have caused his deafness. Beethoven most likely drank from a goblet containing lead.
- Beethoven would clench a stick between his teeth and hold it against the piano to hear faint sounds.
- When Napoleon attacked Vienna in 1809, Beethoven hid in his brother's basement and covered his ears with pillows. He was worried the noise would destroy what little of his hearing remained.

Historical Significance

- Beethoven oversaw the transition of music from the Classical style, full of poise and balance, to the Romantic style, characterized by emotion and impact.
- Beethoven composed his first song when he was just 12 years old. When Beethoven was 17, he performed for Mozart in Vienna.
- Beethoven took lessons from the father of the symphony, Joseph Haydn. The two became easily frustrated and did not like each other.

Great Works

- Moonlight Sonata
- Symphony No. 9 in D Minor
- Symphony No. 5 in C
- Ode to Joy
- Fur Elise



★ ETHOSLOGOS VALUE/VIRTUE OF THE MONTH ★

Digital Curriculum:

GREAT ARTISTS IN HISTORY

Mary Cassatt (1844-1926)



“Women should be someone and not something”
-Mary Cassatt

- ★ Cassatt spent most of her headstrong life as an independent woman abroad, working alongside the bad boys of the Paris avant-garde, Degas, Manet, Renoir, & Pissarro.
- ★ Her admiration for Degas would soon blossom into a strong friendship, and Cassatt exhibited 11 of her paintings with the Impressionists in 1879.
- ★ She was forced to give up painting altogether as diabetes slowly stole her vision. Cassatt lived in almost total blindness, bitterly unhappy to be robbed of her greatest source of pleasure.

4,8,12 - 2-4

ETHOS LOGOS™
Classical Curriculum

Add Resources Options

- Title
- Ethos Logos Classical - Art Curriculum Scope and Sequence MA ...
Added by You · May 21, 2019
- Individual Artist - Build Your Own Course
This folder holds 30+ folders of individual artists studied in a classical school. Each folder contains lesson plans, powerpoint presentations and short or long form documentaries all designed to dive deeply into the life and work of the greatest artists in history.
Added by You · May 29, 2019
- Individual Artists - Schoology Format Lessons
This folder is already built out with all the GREAT COMPOSERS to be moved over to a class you build in Schoology. Customize or use as is.
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- Art By Period - To Build Your Own Courses
Instead of covering individual artists, this section allows you to find tools to build out art time periods. From Renaissance to modern, it's in here.
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CURR - ART CURRICULUM CLASSICAL

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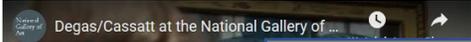
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- Cassatt - Classical Artist Study
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- Cezanne - Classical Artist Study
Added by You · Feb 26, 2019
- DaVinci Classical Artist Study
Added by You · May 29, 2019
- Degas - Classical Artist Study
Added by You · Feb 26, 2019
- Durer - Classical Artist Study
Added by You · Nov 21, 2018
- Gauguin - Classical Artist Study

Mary Cassatt Documentaries

Biography of Mary Cassatt for Kids: Famous Artists for Children - FreeSchool 4:58 min



Degas/Cassatt at the National Gallery of Art

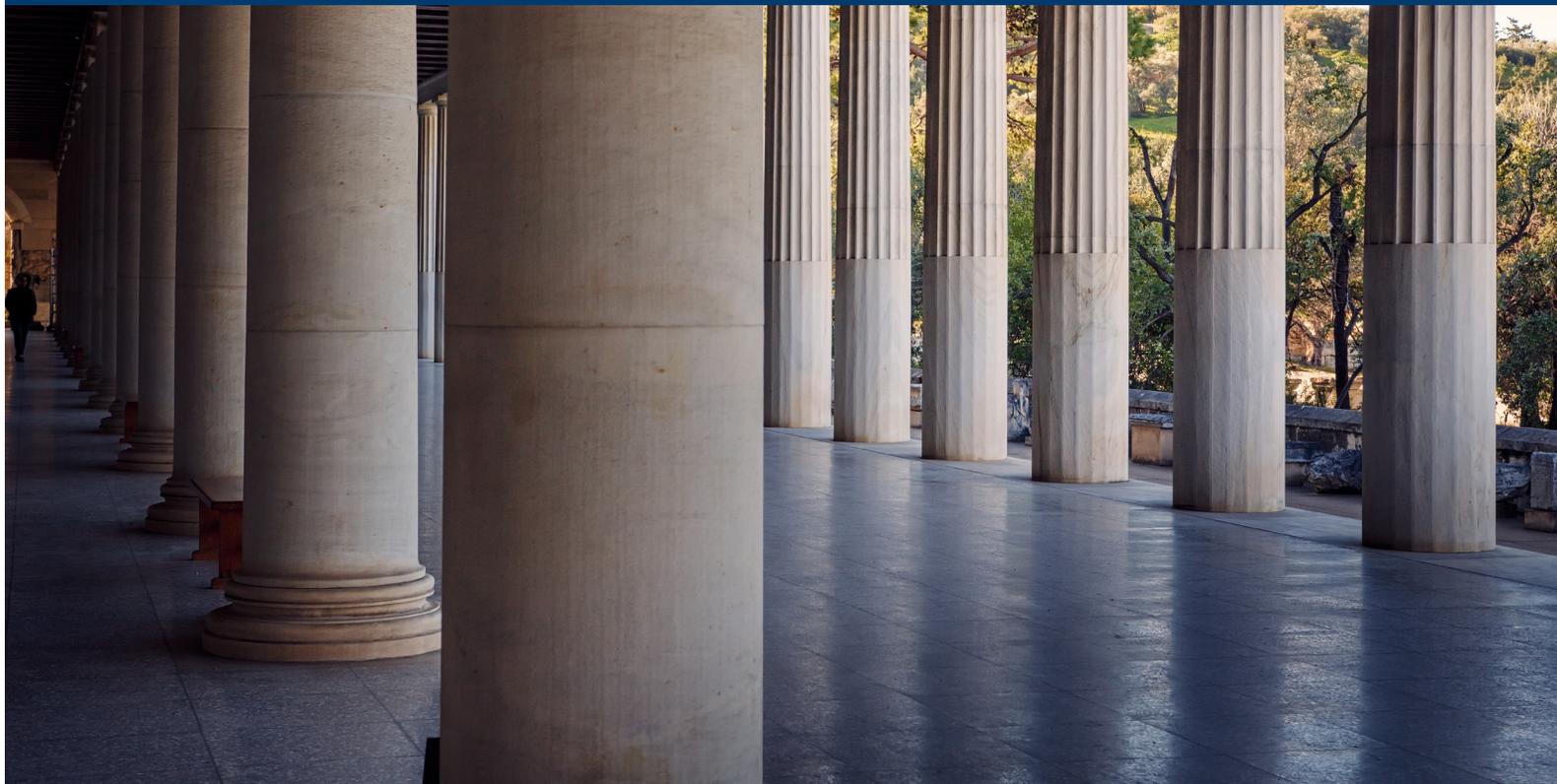


Each Artist & Composer Unit

Historic Impact
Powerpoints for lectures
Lesson Plans

Professional Development on
how to teach art/music
Classically

THE DEMAND OF TEXAS PARENTS FOR CLASSICAL CHARTER SCHOOLS



by Albert Cheng and Cassidy Syftestad

June 2023



Texas Public Policy
Foundation

June 2023

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Texas Public Policy Foundation



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The Demand of Texas Parents for Classical Charter Schools

Albert Cheng and Cassidy Syftestad

Executive Summary

This report has two main purposes. First, we used administrative data from the Texas Education Agency (TEA) and the U.S. Department of Education to document enrollment growth in a particular segment of charter schools in Texas, namely, classical charter schools. Second, we administered a survey to 431 parents who currently have a child enrolled in a classical charter school and convened focus groups for 25 of these parents to explore reasons behind the growth of classical charter schools. On the survey, we queried parents about their educational priorities for their child and their levels of satisfaction with various aspects about their child's school. In focus groups, we asked parents to describe how they heard about their child's school, why they chose to enroll their child there, and what they liked or disliked about their child's school.

According to our analysis of the administrative data, survey results, and focus group data, we found:

1. Student enrollment in charter schools in Texas has increased substantially between the 2011–12 and 2020–21 school years. While enrollment has doubled among non-classical charter schools over this period, enrollment has increased about sevenfold among classical charter schools. Put another way, in the 2011–12 school year, classical charter schools represented 2% of student enrollment in the charter sector. The share of all charter school students who are enrolled in classical charter schools has tripled to 6% as of the 2020–21 school year.
2. Enrollment growth in classical charter schools between the 2011–12 and 2020–21 school years is more pronounced in the secondary grades than in the elementary grades. Growth has also been most pronounced for Asian American (a thirteenfold increase) and Hispanic students (a ninefold increase).
3. Parents' educational priorities aligned with the priorities of classical education. Parents expressed strong desires for their children to grow in wisdom and virtue through the pursuit of truth, goodness, and beauty within the context of a liberal arts education. Parents also highly valued the formation of civic virtues and preparation for citizenship. Although career and college readiness and learning how to address social problems were important educational priorities for many parents, they were less important than the other priorities.
4. Parents were generally quite satisfied with their child's classical charter school. Over 90% of parents said they were "very satisfied" or "somewhat satisfied" with the "overall quality" of their child's school. Parents expressed similarly high levels of satisfaction with their child's teachers and learning progress as well as the quality of the school's academic standards, instruction in character, and climate. However, parents expressed noticeably lower levels of satisfaction with the quality of the facilities and opportunities for sports participation.

Key Points

- Over the last decade, enrollment in classical charter schools in Texas has increased sevenfold while enrollment in other charter schools has doubled.
- Parents who enroll their children in classical charter schools desire a liberal education for their children—one that prioritizes the pursuit of truth, goodness, beauty, wisdom, virtue, and citizenship.
- Parents are generally satisfied with the quality of instruction and climates of classical charter schools, though they expressed some dissatisfaction with the quality of school facilities and opportunities for athletics.

In summary, classical charter schools offer a distinct education rooted in the liberal arts and the pursuit of truth, goodness, and beauty. The findings in this report demonstrate strong alignment between the educational philosophies and priorities of classical charter schools and parents who send their children to these schools. Moreover, classical charter schools appear to deliver the kind of education that these parents hope their children would have. We posit that such alignment and satisfaction are some of the main reasons behind the rapid growth of classical charter schools in Texas over the last decade.

Introduction

Pundits dubbed 2021 “The Year of Educational Choice,” with legislatures in 19 states expanding or enacting 32 educational choice programs ([Bedrick, 2021](#)). In Oklahoma, for instance, the amount of tax credits available for Equal Opportunity Education Scholarships increased from \$3.5 million to \$25 million. Further west, Arizona became the first state to enact an educational choice program with universal eligibility in 2022 ([Beienburg, 2022](#)). Any parent in that state can opt their children out of a district or charter school and have public funds deposited in an education savings account for educational expenses. So far, three states—Arkansas, Utah, and Iowa—have followed Arizona’s lead and passed legislation to establish universal education savings account programs ([Lovell, 2023](#)). Meanwhile, the charter school sector continues to expand. According to the National Alliance for Public Charter Schools, 3.5 million students attended charter schools in the 2020–21 school year, an increase of 7% since the 2019–20 school year ([Veney & Jacobs, 2021, p. 5](#)).

These recent increases in the demand for charter and private school options may have been fueled by school closures and virus mitigation strategies during the COVID-19 pandemic. Indeed, data from the U.S. Department of Education indicate that charter schools were slightly more likely than traditional public schools to refrain from cancelling classes and to ensure real time interaction between teachers and students ([Berger et al., 2022, pp. A-11–13](#)). Clashes in school districts, including across Texas, over the adoption of controversial curricula such as critical race theory have also pushed families to consider other educational options for their children ([Zelinski, 2021](#)).

Even so, the demand for educational options transcends the political issues around race and the pandemic that have marked the last three years. Although Texas has no private school choice programs, it has allowed charter schools to form since the passage of a charter law in 1995 ([SB 1, 1995](#)). In the fall of 1996, 17 charter schools—some of which are

still in operation today—opened in Texas, enrolling just under 2,500 students ([Shapley et al., 2006, p. 3](#)). The sector has experienced considerable growth in 25 years. At the beginning of the 2020–21 school year, over 360,000 students were enrolled in Texas charter schools, and nearly 59,000 additional students were listed on a charter school waitlist ([TEA, 2022, p. 5](#)).

In this report, we focus on a particular sector of charter schools, namely, classical charter schools. Like other charter and private schools, parents have more widely sought out these schools during the pandemic but also beforehand ([Hankins, 2021](#)). We document the prolific growth of these schools and what parents think about them.

In the remainder of the report, we first define classical education and enumerate the hallmarks of this approach to teaching and learning. We then present enrollment trends among Texas classical charter schools overall as well as by grade level and racial background. After that, we present results from surveys and focus groups of families who enroll their children in Texas classical charter schools. We use these data to convey the reasons parents opted for classical education and their assessments of school quality. In the final section, we conclude with a discussion of our findings and their implications for policy.

What Is Classical Education?

What makes a school or education classical? While classical education in modern America has a particular expression, recently documented by Lindquist ([2019](#)), its roots stretch back to between the 5th century BC and the 5th century AD during the Greek and Roman classical periods. However, classical thought is not limited to these two civilizations. Many other cultures and civilizations throughout Africa, East Asia, and the Islamic Empire have experienced their own classical periods. These civilizations not only preserved the classical thought of the Greeks and Romans but also interacted with, responded to, and extended that thought through their own creative work (Nakosteen, 1964; Parham & Prather, 2022). What then, unifies the wisdom bequeathed by these cultures across time and place, and how does it coalesce into a coherent educational paradigm?

The minutiae of classical education are many. For now, we discuss two general attributes of classical education: its aims and its means of attaining those aims.

The Aim of Classical Education

Classical education presupposes that there are normative standards of truth, goodness, and beauty. Peruse the websites of classical schools or talk to their educators and

you will likely find an acknowledgement of their goal to form students intellectually and morally in accordance with these three transcendentals. As classical educators argue, discernment of what is true, good, and beautiful will enable students to grow in wisdom and virtue (Perrin, 2004). In short, knowledge of and love for truth, goodness, and beauty are necessary for living well with oneself and others, or as Aristotle (335–322/2019) put it in his *Nicomachean Ethics*, human flourishing.

The Means of Classical Education

How do classical schools help students grow in the knowledge of truth, goodness, and beauty? Classical educators will often invoke instruction in the liberal arts to describe their pedagogy. The liberal arts traditionally consist of seven subjects, which, if mastered, will enable students to live well. Three of them, namely grammar, logic, and rhetoric, comprise the trivium. The other four—arithmetic, geometry, music, and astronomy—comprise the quadrivium.

In response to a famous speech titled *The Lost Tools of Learning* by the mid-20th century academic and mystery novel writer Dorothy Sayers (1948), classical schools in contemporary times typically emphasize the trivium. To understand the distinctiveness of classical pedagogy, one should not view grammar, logic, and rhetoric as self-contained subject areas but as skills developed within the context of all curricular areas (e.g., math, literature, history, geography, and science).

Grammar is emphasized in the earlier grades and does not merely refer to the study of language mechanics. Instead, it more generally refers to the study of how language works, including how words map onto the real world. Hence, it is common to see young students in the grammar stage observe, memorize, and recite vast amounts of content across the curriculum. They are learning the language that offers them the categories and functions as the currency to know and to relate to the world around them.

In the intermediate grades, logic is emphasized. Logic includes but is not limited to understanding how to make inferences, identifying logical fallacies, and symbolically manipulating mathematical theorems. Logic also comprises understanding how all things are related to one another and make up a coherent whole. In other words, students begin to form connections between the content learned in the grammar stage and to develop their reasoning skills.

Rhetoric, or the art of persuasion, is emphasized among the oldest students, typically the high school grades. Earnest instruction in writing and oration is usual. However, it is important to note that students receive such instruction throughout the course of their education. In fact, aspects of grammar, logic, and rhetoric are woven across the instruction for all ages, but each tends to be emphasized at a particular time.

Note, too, that there is no single way to provide instruction in grammar, logic, and rhetoric. Classical school students often read the Great Books, a term referring to a particular canon of literature, and learn a classical language like Latin. The Great Books, in turn, become the doorway through which students are invited to participate in the so-called Great Conversation, that is, the ongoing dialogue that has occurred throughout history and across various places about perennial questions or enduring ideas about the human condition and a life worth living.

However, the reading lists among classical schools differ, and some classical schools offer instruction in other languages such as Greek. Despite these dissimilarities, the emphasis on the trivium and aim for the students' moral and intellectual formation in accordance with truth, goodness, and beauty is shared among all classical schools. For instance, they generally reject the child-centered approaches of progressive pedagogies that emphasize student autonomy regarding what students will learn, the pace of learning, and how they will be assessed. Instead, classical education immerses students into specific traditions passed down over time and instructs them in wisdom accumulated over human history. Nor do classical schools solely embrace a utilitarian focus on job or vocational training. They argue, instead, that a liberal arts education will prepare children for not only employment but life-long learning and contemplation about a life worth living.

Considering the vision statements of some classical charter schools is instructive for understanding the nature of classical education. Trivium Academy ([n.d.](#)) located in Carrollton, Texas, states that the aim of classical education is to prepare children to be “lifelong learners” ([para. 1](#)). This is accomplished through the particular ways it provides instruction in the trivium by having students “engage in learning content, examine information critically, and express themselves with increasing sophistication each year” ([para. 1](#)). Note that each respective element corresponds to grammar, logic, and rhetoric. Importantly, the object of learning is not arbitrary or simply up to whatever the students decide. Instead, learning is directed towards

truth, goodness, and beauty. According to the Great Hearts (2021) charter school organization operating in Texas:

Classical education takes a unifying approach to intellectual and moral formation by developing both the mind and the heart. Through the study of languages, the sciences, history, mathematics, literature, and fine arts, classical education helps students recover a sense of wonder in their search for knowledge, alongside a deeper purpose – namely, the pursuit of wisdom and development of virtue. (para. 3)

Enrollment Growth of Texas Classical Charter Schools Since 2011

We use administrative data from the Texas Education Agency (TEA, n.d.) student enrollment reports and the Common Core of Data (CCD, n.d.) maintained by the National Center for Education Statistics to provide several indicators for the growth of classical charter schools in Texas between the 2011–12 and 2020–21 school years. We report enrollment figures for the entire population of classical charter school students and then report these figures disaggregated by grade and racial background.

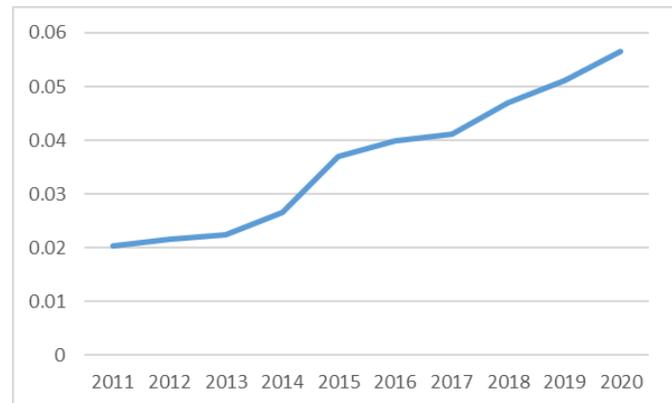
Overall Trends

According to TEA, during the 2020–21 school year, five million school-aged children attended traditional district schools in Texas (TEA, 2021, p. 4). Meanwhile, nearly 366,000 school-aged children attended charter schools (p. 55). About 20,000 of these charter school students attended classical charter schools (TEA, n.d.).

The vast majority of Texas children attend district schools. Based on our analysis of TEA (n.d.) data, however, that sector experienced a 3% decline in enrollment since the prior school year. In contrast, charter school enrollment grew 9% from the prior school year, which is slightly higher than the

7% growth in charter schools nationally over the same time period. Enrollment in classical charter schools, however, stands apart, growing 21% from the 2019–20 to the 2020–21 school years. In fact, the share of charter school students who attend a classical charter school has nearly tripled from 2% to 6% since the 2011–12 school year (see Figure 1).

Figure 1
Classical Charter School Enrollment Share of Total Charter School Enrollment



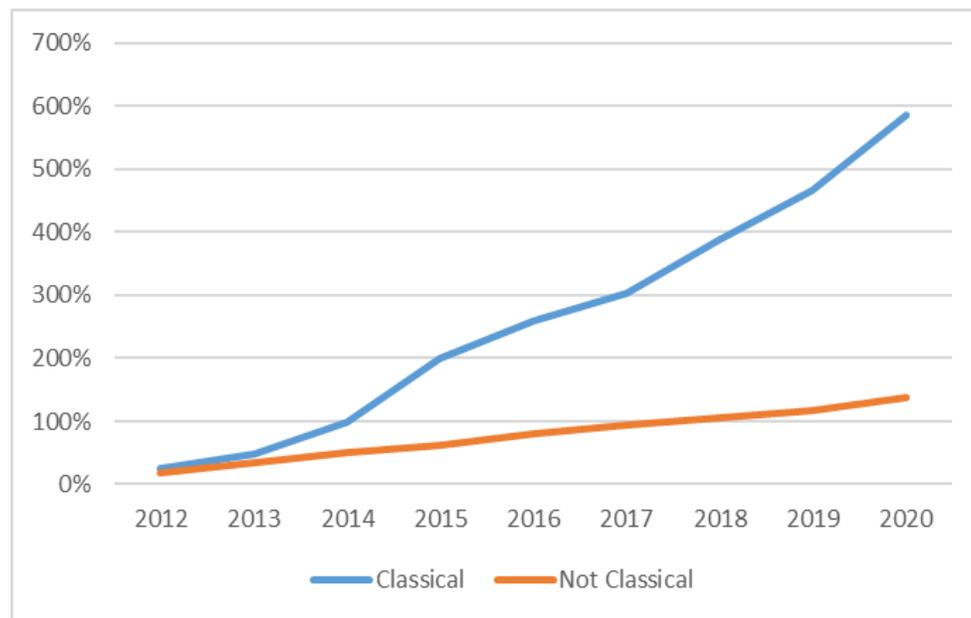
Note. Authors' calculations based on *Student Enrollment Reports*, TEA, n.d., retrieved August 19, 2022 (<https://rptsvr1.tea.texas.gov/adhocrpt/adste.html>).

To convey the enrollment trends of classical and non-classical charter schools throughout the last decade, we computed the percentage change in enrollment for each type of school in each school year using the 2011–12 school year as the baseline. The resulting trend lines are plotted in Figure 2. The percent change in enrollment from the 2011–12 school year to the 2012–13 school year were similar for classical and non-classical charter schools. In that span of one year, classical charter school enrollment grew by about 26%, while non-classical charter school enrollment grew by about 18%.

Classical Schools in Texas

Many classical charter schools in Texas belong to larger, multi-state networks such as Founders Classical Academies or Great Hearts. Other classical charter schools, like Valor Classical Schools, belong to Texas-based networks. A third subset of classical charter schools in Texas are located on a single campus; Trivium Academy is an example of such a school.

Figure 2
Percent Change in Enrollment Since the 2011–12 School Year



Note. Authors' calculations based on *Student Enrollment Reports*, TEA, n.d., retrieved August 19, 2022 (<https://rptsvr1.tea.texas.gov/adhocrpt/adste.html>).

By the 2020–21 school year, enrollment in classical charter schools had increased nearly sevenfold relative to the 2011–12 school year, while enrollment in other charter schools has approximately doubled. As a whole, Texas' charter sector has grown dramatically in the past decade, but the most prolific growth within that sector of late appears to be concentrated among classical charter schools. Such growth rates among classical charter schools hearken back to the rapid growth of the entire Texas charter school sector in its incipient years, when charter school enrollment grew tenfold from about 2,500 students in the 1996–97 school year to over 25,000 students in the 1999–2000 school year ([Shapley et al., 2006, p. 3](#)).

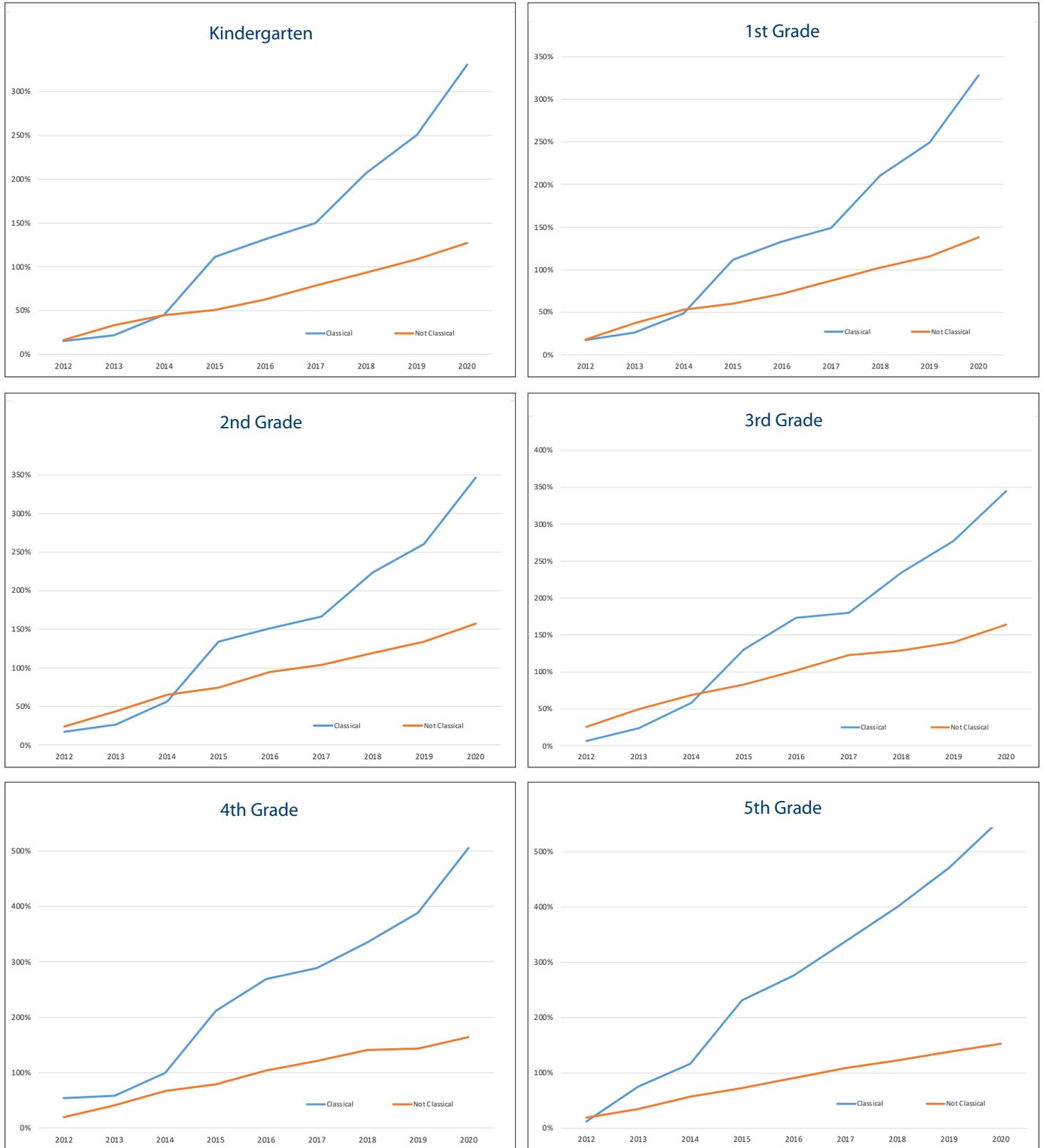
Trends by Grade Level

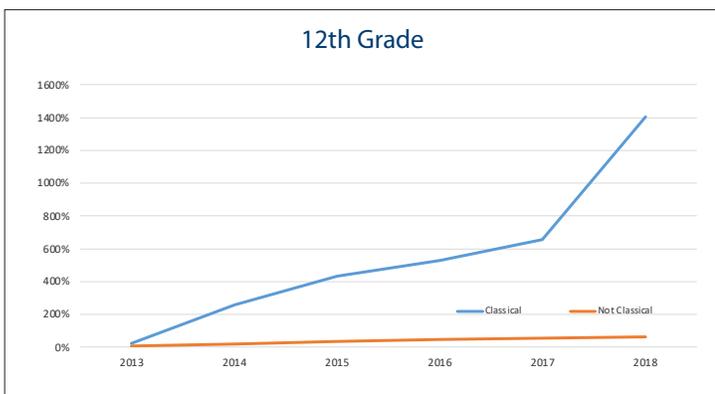
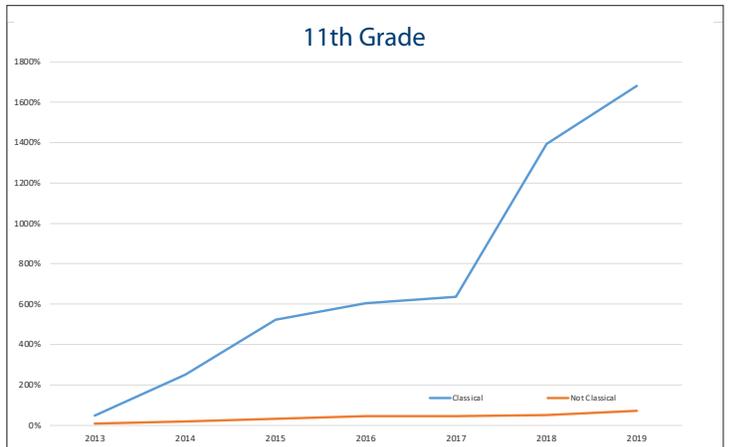
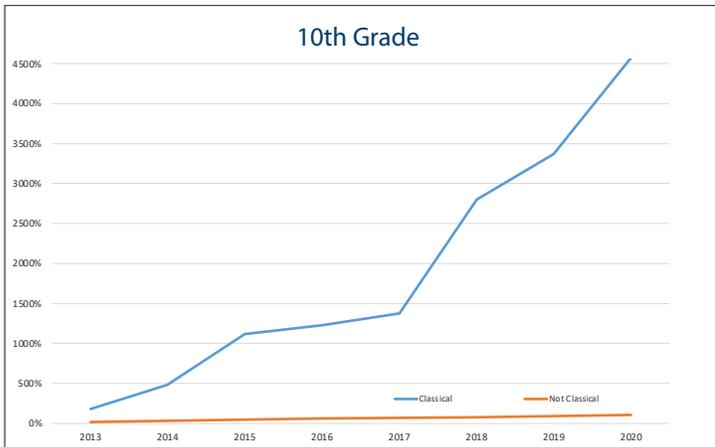
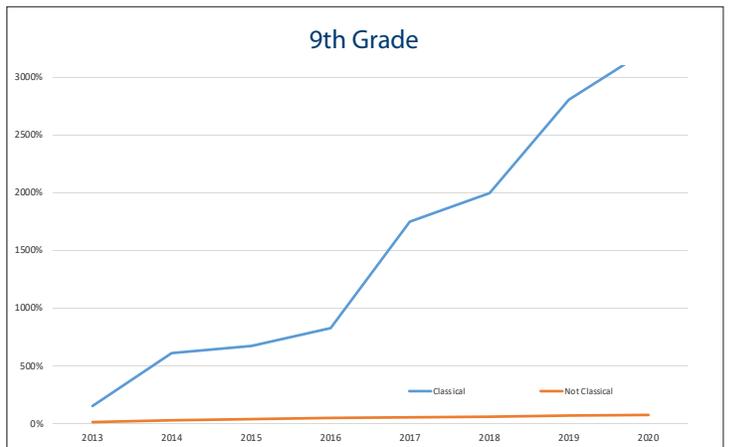
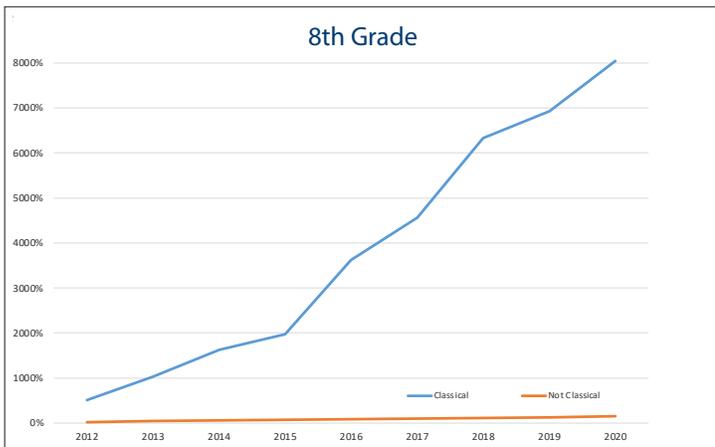
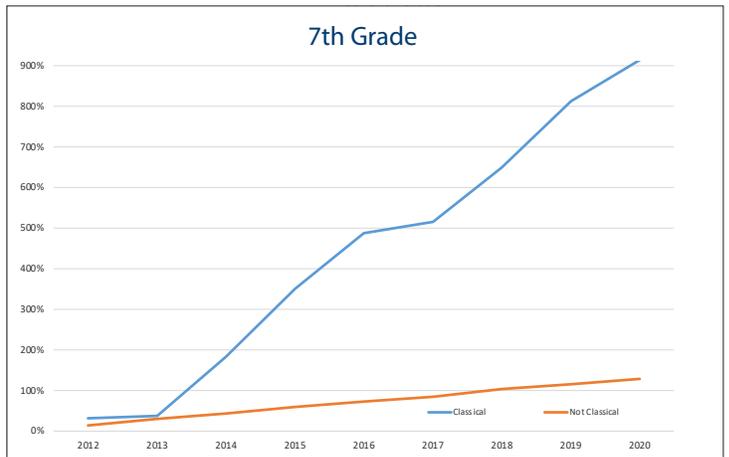
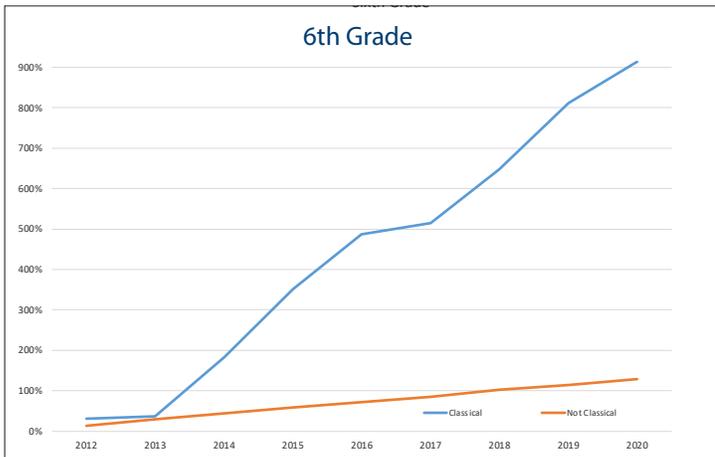
Disaggregating enrollment trends by grade level, we find that, in terms of percent change, most of the growth in Texas classical charter schools over the last decade occurred in the later grade levels. For instance, as shown in the first four graphs in **Figure 3**, enrollment in kindergarten through the third grade has quadrupled since 2011. Meanwhile, enrollment in the fourth and fifth grades has increased by about 500%, or a factor of 6, since 2011. Finally, enrollment in classical charter schools for students in the sixth grade and up have increased by over a factor of 10.

The pattern of moderate growth of the earlier grades compared to the rapid growth of the later grades is consistent with the conventional approach of opening new schools. New schools are often founded with only a few elementary grade levels. In ensuing years, these classrooms are filled with new cohorts of students, while subsequent grade levels are added to accommodate existing students as well as new students in the same grade. It appears that throughout the decade represented in our data, classical charter schools had already established the earlier grades and progressively added middle and high school grades over time. In fact, there were no students in some high school grades until the 2012–13 and 2013–14 school years. Smaller initial cohort sizes partially explain the considerable growth rates at these older grade levels.

We also point out that enrollment across most grade levels of non-classical charter schools has doubled over the past decade. Although this growth rate is not as rapid as the rate for classical charter schools, it is still noticeably greater than the rate for all Texas public schools, which grew by 9% over the past decade ([TEA, 2021, p. 6](#)).

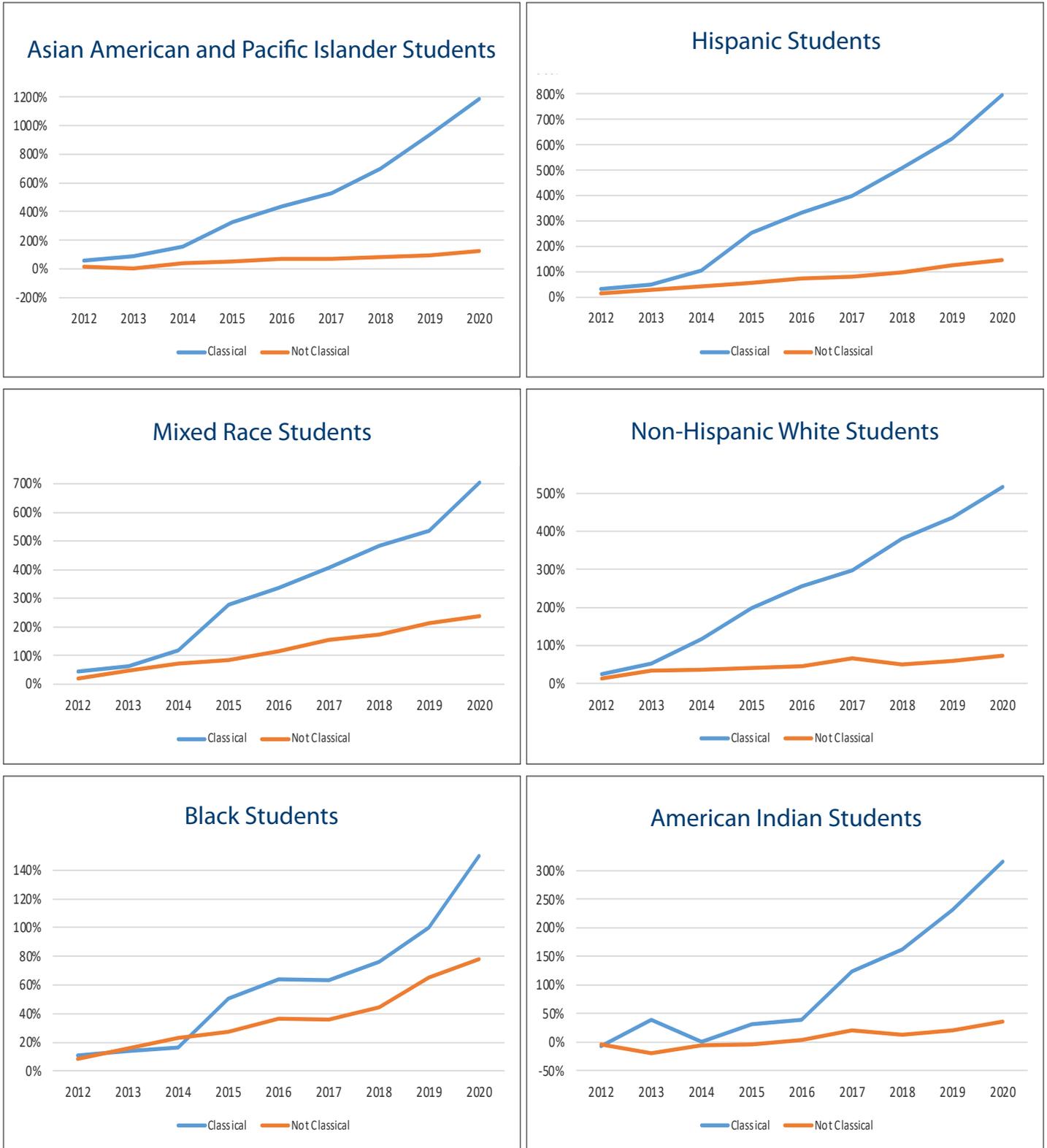
Figure 3
Enrollment Growth Rates by Grade Level (% change since 2011)





Note. Authors' calculations based on Student Enrollment Reports, TEA, n.d., retrieved December 14, 2022 (<https://rptsrvr1.tea.texas.gov/adhocrpt/adste.html>).

Figure 4
 Enrollment Growth Rates by Racial and Ethnic Background (% change in enrollment since 2011)



Note. Authors' calculations based on *Student Enrollment Reports*, TEA, n.d., retrieved December 14, 2022 (<https://rptsvr1.tea.texas.gov/adhocrpt/adste.html>).

Trends by Racial and Ethnic Background

We additionally disaggregate enrollment growth by students' racial and ethnic background. These results are displayed in **Figure 4**. The highest growth rates in classical charter schools since 2011 occurred among Asian American and Pacific Islander students. In the 2011–12 school year, there were only 180 Asian American and Pacific Islander students attending classical charter schools. This number increased well over tenfold to about 2,300 students in the 2020–21 school year. The growth rates for Hispanic students as well as mixed-race students are also substantial over the same period, increasing by a factor of 9 and 8, respectively. As of the 2020–21 school year, there were over 6,000 Hispanic students and 900 mixed-race students in classical charter schools. The number of non-Hispanic White students, on the other hand, increased by a factor of 6 to 8,000 students since the 2011–12 school year. Meanwhile, the number of Black students attending classical charter schools more than doubled from about 700 to 1,800 students. Finally, 13 students who identified as American Indian attended classical charter schools in the 2011–12 school year. That number increased to 54 in the 2020–21 school year. The change of 315% is substantial, though the absolute numbers are small compared to students from other racial or ethnic backgrounds.

Parent Perceptions of Texas Classical Charter Schools: Findings From a Survey and Focus Groups

What explains these enrollment trends? Why are parents choosing classical charter schools and what are their perceptions about them? To further explore reasons behind the growth of classical charter schooling, we administered an online survey and held in-person focus groups to parents who have enrolled a child in a classical charter school. We collected data in these two formats to specifically examine what educational goals parents have for their children and how well classical charter schools are meeting those goals.

Research Methods and Sample

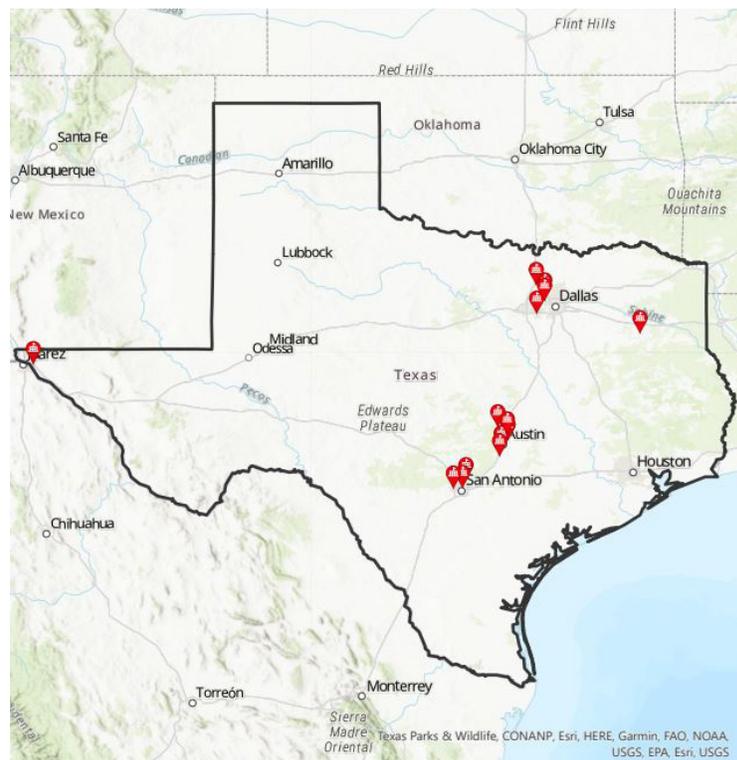
Online Survey

To administer the survey, we first contacted administrators of three major classical charter networks to seek their permission and partnership in this project. The three networks are Valor, Founders, and Great Hearts charter schools. We then asked the school administrators to distribute the survey to the parents of their students. We also directly contacted members of parent groups at some of these schools and invited them to complete and distribute the survey.

We sent out the survey on October 18, 2022, and collected responses until November 30, 2022. In all, 431 respondents from 14 schools completed the survey. The locations of the schools are depicted in **Figure 5**.

Figure 5

Texas Classical Charter Schools Participating in the Survey



Note. From *Student Enrollment Reports*, TEA, n.d., retrieved August 19, 2022 (<https://rptsvr1.tea.texas.gov/adhocrpt/adste.html>).

On the survey, parents were asked to respond to several Likert-type items. One set of items asked parents to rate the importance of several educational goals, including understanding core academic subjects, fostering independent thinking, forming civic or moral virtues, or preparation for future employment. We also queried parents about their satisfaction with various aspects of their child's school: academic standards, order and discipline, teachers and administrators, curriculum, safety, facilities, and extracurricular opportunities.

In this report, we present the topline results for these survey questions. For complete results that additionally disaggregate responses by different demographic groups, please see **Appendix A**.

Focus Groups

To better contextualize not only the enrollment growth of classical charter schools but also the survey results themselves, we convened a series of focus groups to interview parents. Parents who were invited to complete the survey were also invited to participate in these focus groups. On November 11, 2022, and December 7, 2022, 25 parents representing three different schools participated in one of six focus groups. Each focus group lasted about one hour.

We designed a semi-structured interview protocol to query parents about their interest in classical education and their opinions about their child's school. In each focus group, we posed four questions: (1) How did you hear about your child's school? (2) What made you choose to enroll your child in this school? (3) What do you like about your child's school? and (4) How satisfied are you with your child's school? Each discussion was audio recorded, transcribed, and examined for common themes that would illuminate and contextualize the survey results.

In the presentation of our results in the next section, we feature comments from focus group parents alongside our discussion of the survey results.

Results of Survey and Focus Groups

Parents' Educational Priorities

On the survey, we listed 12 different educational objectives and asked respondents to indicate the degree of importance for each objective. The results are displayed in **Figure 6** and are ordered from the objective that the most respondents indicated as "extremely important" to the objective that the fewest respondents indicated as "extremely important."

The Pursuit of Truth, Goodness, and Beauty

As shown in **Figure 6**, 86% of parents indicated that instruction in core academic subjects such as reading, writing, and mathematics was "extremely important." The remaining 14% of parents thought this objective was "very important." One parent explained that their child's school

provides building blocks for the ancient liberal arts skills—how to think, how to read, how to speak, how to write, and how to be a well-formed person. Those skills have to be developed at an early age and continued throughout life, and the school does a great job of establishing those.

Similarly, 4 out of every 5 respondents indicated that independent thinking was an "extremely important" educational

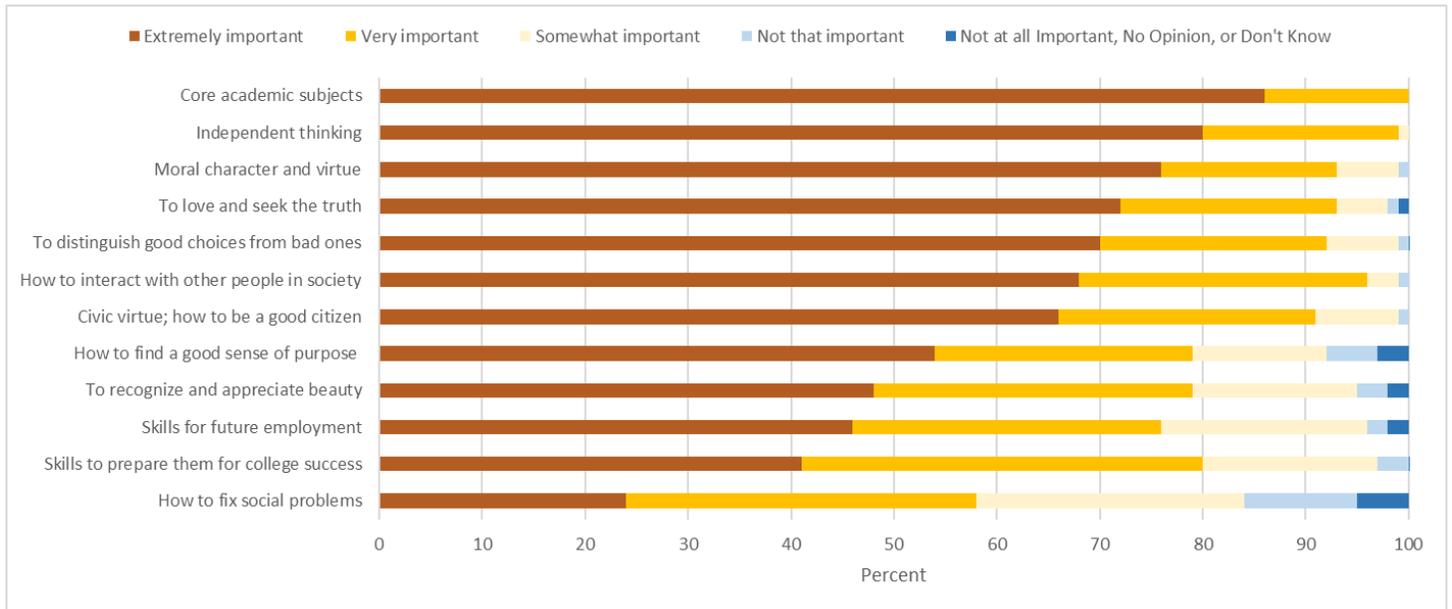
objective. This finding is consistent with the emphasis of classical schools on the liberal arts or, to use Dorothy Sayers's (1948) phrase, acquiring the "tools of learning." Mastery of the liberal arts—historically comprised of the trivium and quadrivium as explained above—equips students to know not only how to think but also how to think well. It is preparation for living a full life, which, as Aristotle, Pascal, and many other educational philosophers throughout history have argued, requires habits of contemplation to discern and proper affections to choose good, worthy, and true things while eschewing evil, unworthy, and false things (Storey & Storey, 2021). The classical charter schools in our sample articulate this aspiration as pursuing knowledge or growing in wisdom, and according to our survey, parents seem to share that aspiration for their children.

Indeed, parents identified developing moral character and virtue, loving and seeking the truth, and distinguishing good choices from bad ones as the next three most important educational objectives. About three fourths of respondents indicated that the formation of moral character and virtue was "extremely important." The proportion of parents who characterized loving and seeking the truth or distinguishing good choices from bad ones as "extremely important" was only a few percentage points lower at 72% and 70%, respectively.

A common, related phrase and priority that parents mentioned in all six focus group sessions was the education of the "whole person." In many cases, this was the first and most important reason parents sought a classical charter school. One parent affirmed their child's school for developing their "body, mind, and soul," commenting that the school has done a "great job of developing the mind and the ability to question things." Another parent added that their top reason for seeking such an education is "the bold and clear teaching that truth is absolute. The school rejects that truth is relative and encourages children to discern the truth for themselves." This kind of instruction is critical for living a full life.

Similarly, though to a lesser extent, respondents identified enabling students (a) to recognize and appreciate beauty and (b) to know how to find a good sense of life purpose, as important educational priorities. About half of respondents indicated it was "extremely important" for schools to focus on these two educational priorities. Approximately an additional third of parents thought recognizing and appreciating beauty was a "very important" educational goal. Meanwhile,

Figure 6
Parents’ Views About the Purpose of Education



Note. See Appendix A for full survey responses.

an additional quarter of parents thought helping students learn how to find a good sense of life purpose was a “very important” educational goal—a necessary goal for a life well-lived.

Overall, these findings demonstrate the alignment between parents’ educational priorities and classical schools’ distinctive mission “to cultivate the hearts and minds of students through the pursuit of Truth, Goodness, and Beauty,” to cite the philosophical pillars of Great Hearts (n.d.). Such alignment might partially explain the recent enrollment growth of classical charter schools.

Civic Virtue and Citizenship

An emphasis on preparation for citizenship and the development of civic virtue is another potential area of alignment between classical charter schools and parents’ educational priorities. Modern debates about education policy often revolve around whether schools deliver private goods to individuals or public goods to society. Classical education, however, rejects this dichotomy. Although it aims to impart wisdom and virtue to individual students so that they might flourish, classical education also recognizes that individuals cannot flourish if their communities are not flourishing as well.

Aristotle, for instance, did not just write the *Nicomachean Ethics* to describe what a well-lived life looks like for an individual. He also wrote the *Politics*, which he intended to be read after the *Nicomachean Ethics*, to describe what the good life looks like for people living in community. This thought is captured in the vision statement of Valor classical charter schools: “to educate the whole person in authentic communities for a full human life” (Valor Education, n.d.-a, para. 1). They explicitly invite students and their families to “live the fullest life possible, one directed by wisdom, animated by wonder, and anchored in friendship” (Valor Education, n.d.-b, para. 1). The formation of civic virtue and preparation for citizenship is, therefore, an essential priority of classical education.

Based on our survey, parents of classical charter schools seem to share this priority of cultivating civic virtue. Two out of every three respondents indicated that it was “extremely important” for schools to teach children “how to interact with other people in society” and “how to be a good citizen.” Another one out of every four respondents described these goals as “very important.” Parents who participated in the focus group reported that classical charter schools teach their children to “be virtuous, think of others, persevere when something is hard, and to be a good member of society.” Their children “are proud of where they go

to school and share a sense of purpose with their classmates, their families, and the surrounding community.”

Calls to bolster civic education in the nation’s schools have increased within the last five years (Winthrop, 2020). Classical education is poised to play a significant role in answering this call.

Departure From Pragmatism and Critical Pedagogy

In contrast to the strong support for educational priorities related to civic education and the pursuit of truth, goodness, and beauty, parents did not consider developing “skills for future employment” or “skills to prepare [their children] for college success” as important. Less than half of parents thought that these education priorities were “extremely important.” Parents valued the educational priority of teaching their children “how to fix social problems” even less. Only one quarter of parents thought that goal was “extremely” important. That said, it is important not to overstate these results. Although parents downplay these educational priorities, they are not dismissive of these goals. These three educational goals historically align with pragmatism and critical pedagogy. We discuss these two modern conceptions of education in turn.

Burgeoning during the Progressive Era of the early 20th century, pragmatism is a philosophy that emphasizes the instrumental or practical value of things. The commonplace utilitarian focus among non-classical schools on workforce preparation, equipping students with job skills, college and career readiness, or vocational training has its roots in pragmatism. Although classical schools also underscore the importance of college and career readiness, they do not view this goal as the primary purpose of education as pragmatism suggests. In other words, classical education considers acquiring technical job skills to make economic contributions and earn money as constitutive but not the whole of living the good life. Classical education also recognizes the inherent dignity of each individual human regardless of how much they can contribute economically. Moreover, the means of equipping students with job skills comes not merely from technical training of specific skills but from a liberal education. In other words, the education in the liberal arts that enables students to become lifelong learners and gives them proper discernment of wisdom, virtue, and a full life is what prepares them to be excellent workers. Our survey respondents seem to grasp this, as they downplay but do not entirely dismiss the educational priority of college and career readiness.

Critical pedagogy also has some roots in the early 20th century but was popularized by Paolo Freire’s *Pedagogy of the Oppressed* (1968/1970). A hallmark of this approach to education is to help students more effectively recognize social problems and understand why they exist. The ultimate goal is for students to take steps towards solving these social problems, typically by challenging existing power structures and institutions.

However, as former teacher and education policy commentator Robert Pondiscio (2022) has observed,

When education becomes activism, it dwells exclusively in the bad and the broken; at least tacitly it encourages children to see their community and country as nothing more than a collection of problems to be solved, with none of the virtues and blessings of citizenship. ... If children view their country as mostly or entirely hostile to their well-being, they cannot help but get the sense that there is nothing worth protecting and preserving. (para. 26)

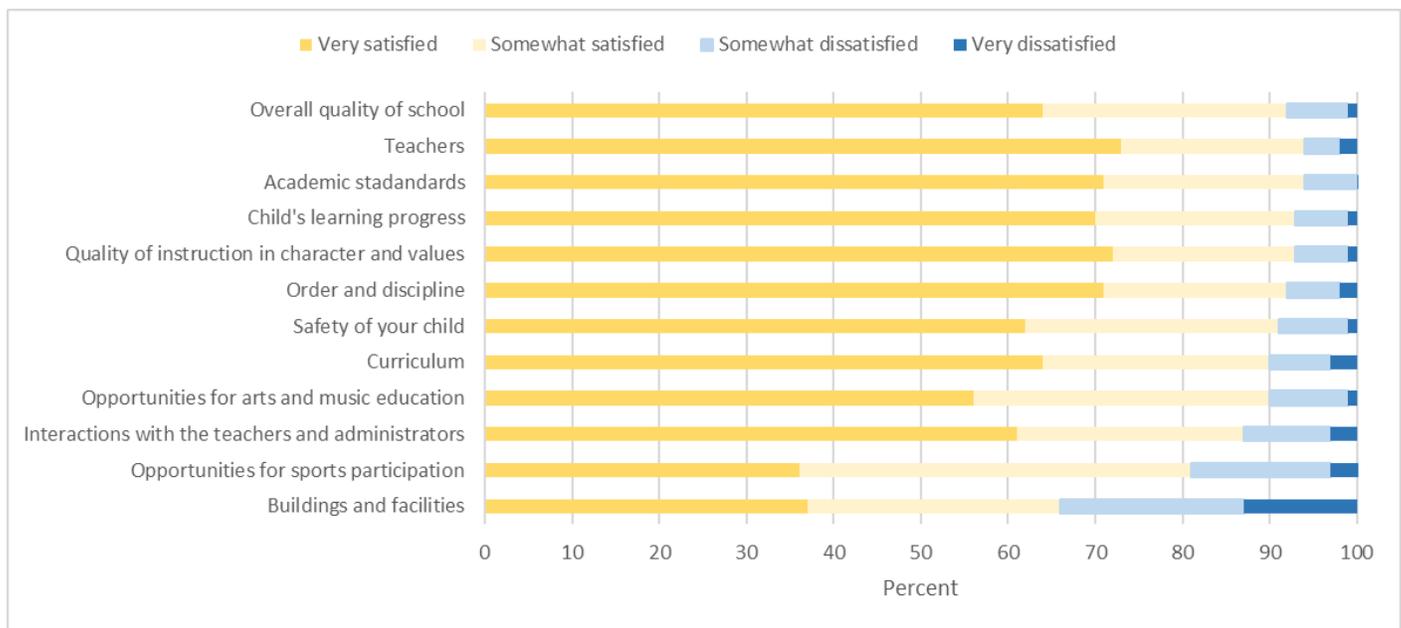
Classical education similarly recognizes that evil and injustice are part of the human condition; however, it does not merely lament that sad reality. It also celebrates the good things that humans have inherited from the past and serve as remedies to evil and injustice—traditions, wisdom, and works of art. In fact, this historical perspective of enduring goods that have been passed down over time helps students appreciate the difficult task of reform and encourages them to hope for, imagine, and work towards a better future. An education in the liberal arts seeks to instill virtue so that students will not remain slaves to their vicious tendencies but will develop a sense of gratitude for the good as well as a moral commitment to seek the good of the world in which they live.

While parents who send their children to classical schools might recognize the extent of society’s problems, their low ratings of the importance of teaching students how to solve social problems possibly reveals their skepticism of critical pedagogy’s effectiveness at equipping their children for that purpose. These parents may instead be more persuaded by the alternative educational approach for thinking about and addressing social problems offered by classical schools.

Parent Satisfaction

Our survey data revealed the educational priorities of parents who send their children to classical charter schools. However, do classical charter schools deliver on their

Figure 7
Parents' Satisfaction With Aspects of Their Child's School



Note. See **Appendix A** for full survey responses.

promises? What do parents think about the quality of these schools? In the next set of results, we present data that speak to these questions.

In general, Texas parents who completed the survey are quite satisfied with their classical charter school. As shown in the first row of **Figure 7**, 64% of parents report being “very satisfied” with their child’s school overall. An additional 28% of parents report being “satisfied.” These satisfaction levels reflect satisfaction levels of other charter school parents in southern U.S. states. For example, according to the 2019 Parent and Family Involvement in Education Survey from the National Household Education Surveys Program ([National Center for Education Statistics, n.d.](#)), 68% and 27% of charter school parents in southern U.S. states report being “very satisfied” and “somewhat satisfied,” respectively, with the overall quality of their child’s school.¹

In our survey, parents were most satisfied with the quality of their child’s teachers, followed by the academic standards at their child’s school, and then their child’s learning progress. These results are displayed in the subsequent rows of **Figure 7**. Over 70% of parents reported being “very satisfied” with these aspects of their child’s education. About an additional one out of every five parents reported being

“somewhat satisfied.” In focus groups, parents explained that many teachers were overqualified for their roles—some hold doctoral degrees in music and the classics—and teach at the elementary level because of their passion for classical education. Parents appreciated this aspect of their child’s teachers. One parent shared that the school’s “ability to attract such excellence indicates that these teachers want the freedom to teach what they are passionate about.”

These satisfaction levels regarding academic standards and teacher quality are, once again, comparable to those reported by charter school parents throughout southern states. Approximately 74% and 21% of charter school parents in the 2019 Parent and Family Involvement in Education Survey reported being “very satisfied” and “somewhat satisfied,” respectively, with the academic standards at their child’s school. Meanwhile, a slightly lower proportion of charter school parents in the U.S. South reported being “very satisfied” with the academic standards at the child’s school compared to the proportion of Texas classical charter school parents. About 63% of charter school parents in the U.S. South reported being “very satisfied” with the quality of their child’s teachers, yet 73% of Texas classical charter parents reported the same—a 10 percentage point difference.

¹ Ideally, one should use the Parent and Family Involvement in Education Survey to compare the satisfaction levels of parents in our survey with satisfaction levels of parents in Texas charter schools. However, the Parent and Family Involvement in Education Survey does not identify respondents by state. The southern region of the U.S., which includes Texas, is the smallest geographic unit found in that data. Moreover, 2019 is the most recent administration year for the Parent and Family Involvement in Education Survey.

As discussed earlier, the cultivation of moral character and virtue is a central goal of classical education, and parents who send their children to Texas classical charter schools very much align with that vision. Over 90% of parents surveyed indicated that the cultivation of moral character and virtue was either an “extremely important” or “very important” goal of education. But do classical schools deliver on that promise? According to our survey respondents, the answer seems to be in the affirmative. When asked to assess their satisfaction with the quality of instruction in character and values at their child’s school, 9 out of every 10 parents reported being “very satisfied” or “somewhat satisfied,” with the bulk of parents—nearly three quarters—being “very satisfied.” One focus group parent endorsed the aim of her child’s teacher to “educate [her] students in virtue and teach them that truth is important to their flourishing and their happiness.” Parents were pleased to know that schools were teaching their children “that goodness is ultimately what is going to make them happy.”

Classical charter school parents in Texas also indicated high levels of approval with the climate of their child’s schools. When it comes to order and discipline at school, 71% of survey respondents were “very satisfied,” while another 21% were “somewhat satisfied.” These rates are slightly more favorable than the 68% and 24% of charter school parents across the U.S. South who respectively were “very satisfied” and “somewhat satisfied” with order and discipline at their child’s school according to the 2019 Parent and Family Involvement in Education Survey.

With respect to school climate, we asked parents to report their satisfaction with their child’s safety at school. About 62% of parents were “very satisfied” with their child’s safety and another 29% were “somewhat satisfied.” Although the 2019 Parent and Family Involvement in Education Survey did not query charter parents about school safety, the 2016 *Education Next* poll did pose this question to a nationally representative sample of 1,571 parents ([Barrows et al., 2017](#)). The poll found that 35% and 46% of charter school parents reported being “very satisfied” and “satisfied,” respectively, with “the safety of [their] child.” Restricting these results to the smaller sample of 26 Texas charter school parents in the data, 35% and 50% reported being “very satisfied” and “satisfied,” respectively, with “the safety of [their] child” ([Peterson et al., 2016](#)). While underscoring the caveat of a different time point and a small sample size of Texas charter school parents in the 2016 *Education Next* poll, our survey indicates that Texas classical charter school parents have more favorable views regarding school safety in 2022.

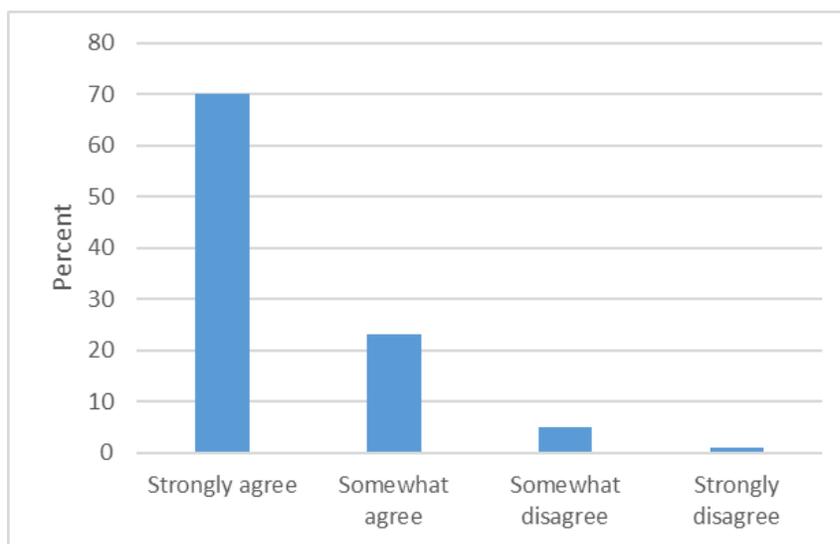
Relative to the other aspects of their child’s school discussed thus far, parents of classical charter schools in Texas are slightly less satisfied with the curriculum. Although satisfaction levels are not low—almost two thirds of parents reported being “very satisfied” with the curriculum—they are noticeably lower than, for example, the 70% of parents who are “very satisfied” with their child’s learning progress.

The relatively lower levels of satisfaction among classical charter school parents with the curriculum may be attributable to the lack of some extracurricular opportunities. For instance, only 56% of survey respondents were “very satisfied” with the opportunities for arts and music education, and only 36% of survey respondents were “very satisfied” with opportunities for sports participation. Prior research has documented the lower availability of extracurricular opportunities among charter schools compared to traditional district schools ([Barrows et al., 2019, p. 19](#)). This result is not to say that classical charter schools, let alone other charter schools, are indifferent to extracurricular opportunities. In fact, education in the arts is an essential component of educating students to recognize beauty, and classical education has long emphasized the importance of gymnastic education to extend the capacities of the physical body and to learn virtue in the context of competition. The lower availability of extracurricular opportunities may partially be a result of the young age of many classical charter schools. With enrollment increasing, many classical charter schools have opened relatively recently and have not had the chance to develop extracurricular programming.

Indeed, the young age of many classical charter schools might additionally explain the lower levels of satisfaction among parents regarding the building and facilities of their child’s school. Only 37% and 29% of parents reported being “very satisfied” and “somewhat satisfied,” respectively, with the quality of the buildings and facilities. This finding is in line with charter school parents nationally ([Barrows et al., 2019, p. 19](#)). Unlike traditional district schools, charter schools do not have access to local sources of revenue and must instead primarily rely on state and federal monies for their operation. These structural funding inequities pose challenges for charter schools to acquire capital or to cover operating costs for their facilities ([Batdorff et al., 2014](#); [DeAngelis et al., 2020](#); [National Charter School Resource Center, 2020](#)).

Nonetheless, respondents in our survey appear pleased with the education that their children are receiving in classical charter schools. As shown in **Figure 8**, only 6% of respondents disagreed that their “child enjoys being a student” at

Figure 8
My Child Enjoys Being a Student at His/Her School



Note. See **Appendix A** for full survey responses.

their classical charter school. Seventy percent of parents “strongly agreed” and the remaining quarter “somewhat agreed” that their “child enjoys being a student” at their school. These results stand in sharp contrast to the Parent and Family Involvement in Education Survey, where only 40% of charter school parents in southern states “strongly agreed” that their “child enjoys school” ([National Center for Education Statistics, n.d.](#)).

Conclusions

Summary of Findings

The interest in classical education among parents has surged in the past decade, and our study demonstrates that this trend is reflected in the growth of classical charter schools in Texas. According to TEA data, the population of students attending classical charter schools only represented 2% of all charter school students in Texas during the 2011–12 school year ([TEA, n.d.](#)). In the 2020–21 school year, classical charter school students represented 6% of all charter school students in Texas. From the 2011–12 school year to the 2020–21 school year, enrollment in non-classical charter schools has more than doubled, while enrollment in classical charter schools has increased sevenfold.

These schools offer a distinct education rooted in the liberal arts and the pursuit of truth, goodness, and beauty—an education that many parents want for their children. Our survey demonstrated strong alignment in the educational philosophies and priorities between classical charter schools

and parents who send their children to these schools. Moreover, classical charter schools appear to deliver the kind of education that these parents hoped their children would have. Our survey indicated high levels of satisfaction among parents with numerous aspects of classical charter schools. We posit that such alignment and satisfaction are some of the main reasons behind the rapid growth of classical charter schools in Texas.

Policy Implications

We conclude this report with three policy proposals to consider. First, we encourage the state to continue authorizing classical charter schools. Waitlists for many of these schools remain in the thousands, even as the classical charter networks open new schools ([TEA, 2022, p. 5](#)). In many areas across the country, including Texas, families are engaging in grassroots efforts to form their own classical schools instead of waiting for a seat in a classical charter school ([Great Hearts, 2021](#); [Wearne & Thompson, 2022](#)). These national trends are reflected in the analysis presented in this report: classical education is in high demand by parents and classical charter schools play a role in meeting that demand.

We would also like to add that the purpose of this report is not to undercut the work of other charter schools and networks in Texas, which should similarly be allowed to expand based on the research evidence. A recent analysis from the Center for Research on Education Outcomes ([2017](#)) based at Stanford University found that Texas charter school

students are more likely to come from a traditionally disadvantaged demographic background, yet they experience greater growth in reading achievement and similar growth in math achievement relative to a matched sample of traditional district school students. Notably, the impacts on student achievement by Texas charter schools has dramatically improved over the decade. The results of the 2017 study diverges from the results of an earlier study conducted by the Center for Research on Education Outcomes (2013), which found relatively lower levels of growth in reading and math achievement for Texas charter school students.

Second, a growing body of research has documented long-standing funding inequities between charter and district schools (Batdorff et al., 2014; DeAngelis et al., 2020; National Charter School Resource Center, 2020). These funding disparities arise typically because charter schools are unable to access local sources of revenue available to their neighboring district-run schools. Practically, this means that charter schools face challenges securing funds to cover capital costs. Our survey underscored this challenge with only one third of parents saying that they were “very satisfied” with the building and facilities of their classical charter school. About twice as many parents were “very satisfied” with other aspects of classical charter schools such as teacher quality, academic standards, and school climate. Steps to close funding disparities between charter and district schools may further enhance the educational opportunities that classical charter schools can offer.

Finally, policymakers should consider how to better support teacher and principal preparation programs for classical schools. What is needed is not necessarily requiring teachers and leaders to obtain a minimum number of professional development credits or hours but building new programs specifically designed around supporting classical pedagogy. Currently, programs for teachers and principals are designed to prepare candidates for non-classical models of schooling. Classical charter schools consequently face the unique challenge of recruiting personnel who may be unfamiliar with classical pedagogy and then providing on-the-job training to follow the classical approach. A few postsecondary institutions across the United States are beginning to build programs for classical educators and school leaders. The University of Dallas is one of these institutions, but more are necessary to meet the demand that parents have for these schools. Additional resources directed to support teacher and principal preparation for classical charter schools will help them meet this demand and offer parents the quality education they seek for their children. ★

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Appendix A: Complete Survey Results for Full Sample and Selected Subgroups

Table A1

How Important Is It for Your Child to Learn the Following in School?

	Full Sample	At or Above Median Income	Below Median Income	White Ethnicity	Non-White Ethnicity	Democrat	Republican	Both Parents have College Degree	At Least One Parent Does not Have College Degree
Observations	431	263	55	220	117	43	159	220	119
Core academic subjects									
Extremely important	86	85	87	85	85	85	82	84	88
Very important	13	14	7	14	12	14	15	16	7
Somewhat important	0	0	5	0	3	0	3	0	4
Not that important	0	0	0	0	0	0	0	0	1
Not at all Important, No Opinion, or Don't Know	0	0	0	0	0	0	0	0	0
Total	99	99	99	99	100	99	100	100	100
Independent thinking									
Extremely important	80	80	85	79	81	80	81	76	86
Very important	19	19	15	19	19	19	19	22	14
Somewhat important	1	1	0	1	0	1	0	1	0
Not that important	0	0	0	0	0	0	0	0	0
Not at all Important, No Opinion, or Don't Know	0	0	0	0	0	0	0	0	0
Total	100	100	100	99	100	100	100	99	100
Moral character and virtue									
Extremely important	75	76	81	75	76	76	84	74	78
Very important	17	16	13	18	15	16	13	18	15
Somewhat important	6	7	6	6	6	7	2	7	4
Not that important	1	1	0	0	3	1	1	1	2
Not at all Important, No Opinion, or Don't Know	0	0	0	0	0	0	0	0	0
Total	99	100	100	99	100	100	100	100	99
To love and seek the truth									
Extremely important	72	71	85	71	73	71	81	70	74
Very important	21	21	11	22	19	21	15	20	21
Somewhat important	5	6	2	5	5	6	3	6	4
Not that important	1	2	0	1	1	2	1	2	1
Not at all Important, No Opinion, or Don't Know	1	1	2	1	2	1	0	1	0
Total	100	101	100	100	100	101	100	99	100

	Full Sample (N = 431)	At or Above Median Income (N = 263)	Below Median Income (N = 55)	White Ethnicity (N = 220)	Non-White Ethnicity (N = 117)	Democrat (N = 43)	Republican (N = 159)	Both Parents have College Degree (N = 220)	At Least One Parent Does not Have College Degree (N = 119)
<u>To distinguish good choices from bad ones</u>									
Extremely important	70	70	77	69	72	70	76	68	74
Very important	22	22	19	23	20	22	19	23	19
Somewhat important	7	7	4	7	5	7	4	7	5
Not that important	1	1	0	0	1	1	1	1	1
Not at all Important, No Opinion, or Don't Know	1	1	0	0	1	1	0	1	1
Total	101	101	100	99	99	101	100	100	100
<u>How to interact with other people in society</u>									
Extremely important	68	67	75	67	68	67	71	67	69
Very important	28	29	25	27	30	29	27	28	29
Somewhat important	3	3	0	4	1	3	1	4	2
Not that important	1	1	0	1	1	1	1	1	1
Not at all Important, No Opinion, or Don't Know	0	0	0	0	0	0	0	0	0
Total	100	100	100	99	100	100	100	100	101
<u>Civic virtue; how to be a good citizen</u>									
Extremely important	66	65	79	64	69	65	74	62	73
Very important	25	27	13	28	21	27	23	29	19
Somewhat important	7	7	8	7	7	7	4	8	5
Not that important	1	2	0	0	3	2	0	1	2
Not at all Important, No Opinion, or Don't Know	0	0	0	0	0	0	0	0	0
Total	99	101	100	99	100	101	101	100	99
<u>How to find a good sense of purpose</u>									
Extremely important	54	51	67	48	63	51	60	50	61
Very important	25	26	17	33	15	26	25	27	22
Somewhat important	13	13	13	13	12	13	10	14	11
Not that important	5	6	2	4	6	6	3	6	5
Not at all Important, No Opinion, or Don't Know	3	3	0	2	4	3	1	3	2
Total	100	99	99	100	100	99	99	100	101
<u>To recognize and appreciate beauty</u>									
Extremely important	48	45	64	48	48	45	56	49	46
Very important	31	32	28	37	23	32	29	34	27
Somewhat important	16	17	6	12	21	17	12	11	23
Not that important	3	4	2	3	4	4	1	5	2
Not at all Important, No Opinion, or Don't Know	2	2	0	1	3	2	1	1	2
Total	100	100	100	101	99	100	99	100	100

Table A1, continued*How Important Is It for Your Child to Learn the Following in School?*

	Full Sample (N = 431)	At or Above Median Income (N = 263)	Below Median Income (N = 55)	White Ethnicity (N = 220)	Non-White Ethnicity (N = 117)	Democrat (N = 43)	Republican (N = 159)	Both Parents have College Degree (N = 220)	At Least One Parent Does not Have College Degree (N = 119)
<u>Skills for future employment</u>									
Extremely important	46	42	63	41	53	42	49	38	58
Very important	30	30	29	33	28	30	30	33	27
Somewhat important	20	24	8	22	16	24	19	23	14
Not that important	2	2	0	2	2	2	1	3	1
Not at all Important, No Opinion, or Don't Know	2	2	0	3	1	2	1	3	1
Total	100	100	100	101	100	100	100	100	101
<u>Skills to prepare them for college success</u>									
Extremely important	41	37	54	34	49	37	37	37	45
Very important	39	41	30	43	33	41	39	41	35
Somewhat important	17	18	11	18	16	18	21	18	17
Not that important	3	2	6	3	2	2	2	3	3
Not at all Important, No Opinion, or Don't Know	1	1	0	1	1	1	1	2	0
Total	101	99	101	99	101	99	100	101	100
<u>How to fix social problems</u>									
Extremely important	24	22	40	18	32	22	26	19	32
Very important	34	34	36	36	32	34	35	36	32
Somewhat important	25	26	18	27	21	26	25	26	24
Not that important	11	13	5	14	8	13	10	14	7
Not at all Important, No Opinion, or Don't Know	5	5	0	4	6	5	4	5	5
Total	99	100	99	99	99	100	100	100	100

Note. Percentages may not total 100% due to rounding. Subgroup sample sizes may not add up to the full sample size due to respondents preferring not to provide specific demographic information.

Table A2
How Satisfied Are You With Each Aspect of Your Child's School?

	Full Sample (N = 431)	At or Above Median Income (N = 263)	Below Median Income (N = 55)	White Ethnicity (N = 220)	Non-White Ethnicity (N = 117)	Democrat (N = 43)	Republican (N = 159)	Both Parents have College Degree (N = 220)	At Least One Parent Does not Have College Degree (N = 119)
<u>Overall quality of school</u>									
Very satisfied	64	64	71	66	62	64	69	65	62
Somewhat satisfied	27	30	20	27	29	30	27	27	28
Somewhat dissatisfied	7	5	9	7	7	5	3	6	9
Very dissatisfied	1	2	0	1	2	2	1	1	1
Total	0	0	0	0	0	0	0	0	100
<u>Teachers</u>									
Very satisfied	73	75	73	74	71	75	79	73	73
Somewhat satisfied	21	20	18	20	21	20	18	22	19
Somewhat dissatisfied	4	3	7	3	5	3	2	4	4
Very dissatisfied	2	2	2	2	2	2	1	1	4
Total	100	100	100	99	99	100	100	100	100
<u>Academic standards</u>									
Very satisfied	71	74	67	71	71	74	80	72	68
Somewhat satisfied	23	21	25	24	21	21	16	21	25
Somewhat dissatisfied	6	4	7	5	8	4	4	6	6
Very dissatisfied	1	1	0	0	1	1			1
Total	101	100	99	100	101	100	100	99	100
<u>Child's learning progress</u>									
Very satisfied	70	73	69	72	66	73	77	73	64
Somewhat satisfied	23	22	24	22	25	22	19	22	26
Somewhat dissatisfied	6	4	7	5	7	4	3	4	9
Very dissatisfied	1	2	0	1	2	2	1	1	2
Total	100	101	100	100	100	101	100	100	100
<u>Quality of instruction in character and values</u>									
Very satisfied	72	77	64	76	65	77	76	73	69
Somewhat satisfied	21	17	27	18	25	17	20	20	23
Somewhat dissatisfied	6	5	9	5	9	5	3	6	7
Very dissatisfied	1	1	0	1	1	1	1	1	1
Total	100	100	100	100	100	100	100	100	100

Table A2, continued
How Satisfied Are You With Each Aspect of Your Child's School?

	Full Sample (N = 431)	At or Above Median Income (N = 263)	Below Median Income (N = 55)	White Ethnicity (N = 220)	Non-White Ethnicity (N = 117)	Democrat (N = 43)	Republican (N = 159)	Both Parents have College Degree (N = 220)	At Least One Parent Does not Have College Degree (N = 119)
<u>Order and discipline</u>									
Very satisfied	71	72	76	75	65	72	81	71	70
Somewhat satisfied	21	22	15	18	25	22	16	22	19
Somewhat dissatisfied	6	5	9	6	6	5	3	5	8
Very dissatisfied	2	2	0	1	3	2	1	1	3
Total	100	101	100	100	99	101	101	99	100
<u>Safety of your child</u>									
Very satisfied	62	66	60	61	63	66	69	64	58
Somewhat satisfied	29	26	33	28	31	26	22	25	34
Somewhat dissatisfied	8	7	5	9	6	7	8	10	5
Very dissatisfied	1	1	2	2	1	1	2	1	2
Total	100	100	100	100	101	100	101	100	100
<u>Curriculum</u>									
Very satisfied	64	67	66	66	62	67	65	68	58
Somewhat satisfied	26	25	21	25	28	25	30	25	28
Somewhat dissatisfied	7	5	13	8	4	5	4	4	10
Very dissatisfied	3	3	0	1	5	3	1	2	4
Total	100	100	100	100	99	100	100	99	100
<u>Opportunities for arts and music education</u>									
Very satisfied	56	59	51	56	57	59	58	56	56
Somewhat satisfied	34	31	35	35	32	31	34	35	32
Somewhat dissatisfied	9	8	11	8	9	8	8	8	10
Very dissatisfied	1	1	4	1	2	1	0	0	3
Total	100	99	101	100	100	99	100	99	100
<u>Interactions with the teachers and administrators</u>									
Very satisfied	61	62	63	62	59	62	66	63	57
Somewhat satisfied	26	26	26	26	26	26	23	26	25
Somewhat dissatisfied	10	9	9	10	11	9	8	9	13
Very dissatisfied	3	3	2	2	4	3	3	2	5
Total	100	100	100	100	100	100	100	100	100

	Full Sample	At or Above Median Income	Below Median Income	White Ethnicity	Non-White Ethnicity	Democrat	Republican	Both Parents have College Degree	At Least One Parent Does not Have College Degree
	(N = 431)	(N = 263)	(N = 55)	(N = 220)	(N = 117)	(N = 43)	(N = 159)	(N = 220)	(N = 119)
<u>Opportunities for sports participation</u>									
Very satisfied	36	38	36	36	35	38	39	37	33
Somewhat satisfied	45	44	44	46	43	44	46	44	45
Somewhat dissatisfied	16	15	15	15	17	15	13	16	15
Very dissatisfied	4	3	5	3	5	3	3	2	7
Total	101	100	100	100	100	100	101	99	100
<u>Buildings and facilities</u>									
Very satisfied	37	34	55	35	41	34	39	30	50
Somewhat satisfied	29	30	24	27	32	30	35	31	25
Somewhat dissatisfied	21	24	13	24	17	24	16	26	13
Very dissatisfied	13	12	9	15	10	12	10	13	12
Total	100	100	101	101	100	100	100	100	100

Note. Percentages may not total 100% due to rounding. Subgroup sample sizes may not add up to the full sample size due to respondents preferring not to provide specific demographic information.

Table A3
My Child Enjoys Being A Student at His/Her Current School

	Full Sample	At or Above Median Income	Below Median Income	White Ethnicity	Non-White Ethnicity	Democrat	Republican	Both Parents have College Degree	At Least One Parent Does not Have College Degree
	(N = 431)	(N = 263)	(N = 55)	(N = 220)	(N = 117)	(N = 43)	(N = 159)	(N = 220)	(N = 119)
<u>My Child Enjoys Being a Student</u>									
Strongly agree	70	73	75	71	68	73	78	70	69
Somewhat agree	23	22	20	22	25	22	17	26	19
Somewhat disagree	5	4	5	5	6	4	4	3	9
Strongly disagree	1	1	0	1	1	1	1	0	3

Note. Percentages may not total 100% due to rounding. Subgroup sample sizes may not add up to the full sample size due to respondents preferring not to provide specific demographic information.

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Kinder OUTLINE Curriculum Map

	Read Aloud	Recitations	Fairy Tale	History	Science	Composer	Artist	Value of the Month
Aug	The Trumpet of the Swan EB White	The Apple Song Frances Frost	Johnny Appleseed (Excellence)	Ancient Times - Mummies - First Paper - Egypt/Nile	(BIO) All About Me Botany Apples Plant Cycles - Flowers - Stems - Leaves - Roots	Beethoven Elements of music: instrument families; xylophone and percussion	Cezanne Intro to Color: Warm: red, orange, yellow; Cool: blue; green, purple	Intro to Values & Virtues Excellence - Respect
Sept	Charlotte's Web EB White	The Cow Robert Louis Stevenson	The Ant and The Grasshopper (Order) The Ass and in the Lion's Skin (Silence)	Middle Ages, Knights - Castles	(BIO) Botany Farms (Feudal System) Community Helpers - Work Citizenship 5 Senses (ties in with Journey's)	Schubert Elements of music: instrument families	Monet Color: Helen Frankenthaler's Blue Atmosphere	Silence - Order
Oct	Stuart Little EB White	Rain Robert Louis Stevenson	Three Little Pigs (Perseverance)	Explorers - Marco Polo - Columbus - Magellan	(Physics) Magnets Compass - Navigation Simple Machines - Pulley - Gravity Static Electricity - Incline Plane	Mozart Elements of music: instruments of the orchestra	Seurat Line: Straight, curved, zigzag, thin, thick	Resolution or Perseverance (Grit)
Nov	The Lion, the Witch & the Wardrobe CS Lewis	The Pilgrims Came Annette Wynne	The Gingerbread Boy (Humility) The Wonderful Porridge Pot (Humility) The Hare and The Tortoise (Humility) The Lion and The Mouse (Humility) The Fox and The Crow (Humility)	Halloween - Early America - Pilgrims - 1st Thanksgiving - Native Americans	(Earth) Meteorology - Pumpkins - Water Cycle - Weather - Season - Wind - Tornado - Thermometer	Bach and Teacher Choice Elements of music: instruments; performance and listening skills; Naive American music	Regional American Artist Intro to Sculpture: American Indian Totem Poles	Humility - Cleanliness
Dec	Author Study (Eric Carle, Jan Brett, Eve Bunting...)	A Hundred Ripples Anonymous	The Little Red Hen (Citizenship)	Gold Rush - Mexico - Wagon Trains Holidays - Christmas, Hanukkah - New Years	(Earth) Meteorology - Sun Solar System - Astronauts Zoology Arctic Habitat	Handel Elements of music: rhythm, clap patterns	Cassatt Intro to Sculpture: Statue of Liberty; Mount Rushmore;	Honor - Citizenship
Jan	Mr. Popper's Penguins Richard and Florence Atwater	Ladybug Joan Walsh Anglund	The Ugly Duckling (Beauty) Puss In Boots (Wisdom) Joseph and His Brothers (Beauty/Goodness) Country Mouse City Mouse (Beauty)	Jazz - Americana (art/music/Radio/TV) Freedom Fighters - MLK, Chavez - Rosa Parks - Gandhi	(BIO) Zoology - Habitats for Animals - Insect - Ladybug - Ants - Flying Insects - Butterfly	Rimsky-Korsakov Elements of music: vocal technique, rhythmic movement	Picasso Looking at Art: Explore+9HJ9:K9	Truth - Beauty - Goodness
Feb	Charlie & the Chocolate Factory Rold Dahl	A Wish For February Donovan Marshall	The Golden Goose (Greed/Justice) Two Goats (Service)	Presidents - Washington and Lincoln Local Holiday or Customs	(BIO) Zoology Dinosaurs - Reptiles - Desert Habitat (AZ) - Mountain Habitat (CO) - Local Habitat Mammals - Birds - Fish	Hayden Elements of music: improvisation (Jazz)	Gilbert Stuart	Justice - Service
March	The Chocolate Touch Patrick S Catling	I Meant To Do My Work Today Le Gallienne	The Six Swans (Patience) The Mirror of Matsuyama (Compassion/Generosity) Midas, The Golden Touch (Greed/Generosity) The Wizard of Oz (Generosity)	National Symbols - Local and State Symbols	The Ugly Duckling (Beauty)	Chopin Elements of music: performance and listening skills	Van Gogh	Moderation- Generosity
April	Mrs. Piggle Wiggle Betty MacDonald & James and the Giant Peach Roald Dahl	The Swing Robert Louis Stevenson	Little Red Riding Hood (Integrity)	Modern World - Tech, iPhone, Transportation	(Earth) Geology Rocks - Soil - Water - Geologist Physical Properties - Man Made vs Natural - Relationship and Movement - Reduce/Reuse - Earth Day - Rainforest - Frogs	Vivaldi Review & Application of Elements, Concepts, Works, and Songs	Renoir Jackson Pollack - Andy Warhol	Integrity - Loyalty
May	The BFG Roald Dahl Fantastic Mr. Fox Roald Dahl The Enormous Crocodile Roald Dahl	Singing Robert Louis Stevenson	The Two Brothers (Courage) Belling The Cat (Courage) Rumpelstiltskin (Courage)	Intro to Geography	(Earth) Geology Continents - Oceans - Globes Ocean Habitat -Rocks - Fossils - Volcano - Sedimentary Rocks	Tchaikovsky	DaVinci	Courage - Trust

Kinder ENGLISH Curriculum Map

	Grammar	Emergent Reading (Literacy)	Literary Skills (Year Long)	Writing (Emergent)	Cultural Sayings
Aug	Oral Phonemic Awareness; Correct Sitting/Writing Position	Name the letters of the alphabet and their corresponding sounds (consonants, long and short vowels). a. Identify phonemes for letters (recognize that /d/ is the letter d). b. Identify and produce words that begin with the same sound (alliteration).	Foundation Skills: 1. Identify front cover, back cover, title, title page and first page of text, Basic features of print 2. Follow words left to right, top to bottom, and page by page. 3. Recognize that spoken words are represented in written language by specific sequences of letters. 4. Understand that words are separated by spaces in print. 5. Recognize and name all uppercase and lowercase letters of the alphabet.	Copy sentences from primary sources, or literature.	"Practice makes perfect."
Sept	Finger Tracing and Pencil Grip Writing; Handwriting readiness; Writing habits	Demonstrate understanding of spoken words, syllables, and phonemes. a. Students can physically break down sounds and syllables (clap, step, jump, tap).	With prompting, retell the main idea of fairy tales, fables, myths, parables, and stories.	Begin to notice and use capital letters and beginning punctuation.	"Do unto others as you would have them do unto you."
Oct	Initial and Ending Sounds - Rhyming - Deletion and Substitution. Advanced - form regular plural nouns orally by adding /s/or/es/ (e.g., dog, dogs, fish, fishes) when speaking.	Introduce word families through onset and rime patterns. a. Add or subtract individual phonemes in simple, one-syllable words to make new words (e.g., /at/ - /sat/ - /mat/. b. Substitute final consonant in rhyme to make new words (e.g., /mat/ - /map/). 4. Recite and produce rhyming words.	Sort pictures from a story into chronological order. Identify character's virtuous or unvirtuous choices in a read aloud.	Define sentences as a communication of an idea that starts with a capital letter and ends with punctuation.	"Better safe than sorry."
Nov	First Letter Sound Blending; Line letter formation; Basic code for spelling and reading Advanced - form regular past tense verbs orally (e.g., played, walked)	Count, pronounce, blend, and segment syllables in spoken words.	Phonological skill: 1. Recognize and produce rhyming words. 2. Count, pronounce, blend, and segment syllables in spoken words. 3. Blend and segment onsets and rimes of single-syllable spoken words. 4. Isolate and pronounce the initial, medial vowel, and final sound (phonemes) in the three phoneme (CVC) words.	work from left to right, top to bottom. - mark answers (underline, draw a line across, mark with X). - locate pages	"The early bird gets the worm."
Dec	First Letter Sound Blending; Capital letters; Dictated sentences Advanced - understand and use the most frequently occurring prepositions in English (e.g., to/from, in/out, on/off, for, of, by, With) when speaking.	Count individual words in spoken phrases or simple sentences.	With prompting, recall details from a text read aloud.	hold pencil, marker or crayon correctly. - fold paper	"Look before you leap."
Jan	Writing Sentences; Intro to verbs; intro to nouns; silent final 'e' Advanced - produce and expand complete sentences in shared language and writing activities.	Blend and segment consonants and rimes of spoken words (/g/ /oat/, /bl/ - /ack/).	Phonics skills 1. Demonstrate basic knowledge of one-to-one letter-sound correspondence. 2. Associate the long and short sounds with common spellings for the five major vowels. 3. Read grade-level high-frequency sight words with automaticity. 4. Distinguish between similarly spelled words by identifying the sounds of the letters that differ.	complete puzzle - cut along dotted lines	"Where there's a will, there's a way."
Feb	Writing Sentences; Silent "e"; transition to student-generated sentences	Demonstrate phonemic awareness by isolating and pronouncing the initial, medial vowel, and final phonemes (sounds) in three-phoneme (CVC) words. (e.g./ dog/, /hat/). a. Practice making, building, and manipulating new letters/sounds in word building activities (letter tiles, word sorts, sound boxes).	Predict events in a story. With prompting, recall the characters of a story.	learn proper penmanship/handwriting	"It's raining cats and dogs."
March	Writing Sentences - Beginning Revision Advanced - understand and use questions words (e.g., who, what, where, when, why and how) in discussions.	Understand that letters and sounds are related and can be understood based on the code of the English language. - Learn scope and sequence of phonics skills from simple to more complex (cvc, short vowels, blends, digraphs, silent e, vowel teams, syllables, morphology).	Speaking and Listening Skills/Competencies: 1. Participate in small and large group conversations 2. Listen attentively to ask and answer questions about key details in an orally presented text. 3. Using words to see		"April showers bring May flowers."
April	Writing Sentences - Beginning Revision Advanced - capitalize the first word in a sentence and the pronoun I.	Demonstrate basic knowledge of letter-sound correspondence by producing the primary or most frequent sound for each consonant. - Say the long and short sounds of graphemes for the five major vowels - Read common high frequency words by sight (e.g., the, of, to, you, she, my, is, are, do, does) and provide resources to practice.	Literature (Fiction) Skills/Competencies: 1. Retell story 2. Answer questions about key details in story 3. Story parts: characters, setting, major events 4. Identify author and illustrator and define their role 5. Recognize types of text; Poetry, Story (fantasy, reality), Informational 6. Ask and answer questions about unknown words in text 7. Make connections between illustrations and text 8. Compare and contrast two characters 9. Identify and use new vocabulary words and phrases from content- Multiple-meaning words - Unknown words 10. Be an active participant in learning in whole-group activities		"Great oaks from little acorns grow."
May	Types of Sentences; Compound words Advanced - name and identify end punctuation, including periods, questions marks, and exclamation points.	Distinguish between similarly spelled words by identifying the sounds of the letters that differ (e.g., bat vs. sat, cat, vs. can, hit vs. hot). - Practice chunking, blending, and sounding out to read and produce words. - Identify common "chunks" of words and use to read and make new words (word families: cat, hat, sat, bat).			

1st Grade OUTLINE Curriculum Map

1st	Literature	Read Aloud	Recitation	History (Ancient)	Ethos 100	Science (BIO)	Artist	Composer	Virtues
Aug		The Tales of Peter Rabbit Beatrix Potter	Caterpillar Rosetti	6000 BC - 3000 BC Intro: What is Archeology The Earliest People/Mesopotamia - Egypt	Ethos #100 4, 91	Week 1-3 Welcome To Science - Expose scholars to the Basics (Optional) Unit 1: Habitat and animal behavior Focus	Basic Elements - Beethoven	Cezanne Art from Long Ago: Review color and line; Mesopotamia cave paintings; art of Ancient Egypt; Sphinx	Intro to Values & Virtues Excellence -Respect
Sept		Pyramids and Mummies Simon	The Rooks Brown	3000 BC - 1500 BC Old Testament - Egypt Sumerian Dictator Hammurabi Babylonians Assyrians	Ethos #100 18, 31	Mammals - 8 Part Unit Bats - Kangaroo - Elephant Birds - Reptiles Lizards - Snakes - Alligator	Basic Notation - Beethoven	Cezanne Art from Long Ago: Tutankhamen Nefertiti	Silence - Order
Oct		Jack and the Beanstalk Beneduce	Now We Are Six AA Milne	3000 BC - 1500 BC The Far East: Ancient China	Ethos #100 3, 74, 77	Fish - Dolphins - Whales - Sharks	Composers - Beethoven	Cezanne Colors: Primary and secondary	Resolution or Perseverance (Grit)
Nov		Who Was King Tut? Edwards	Little Things Carney	3000 BC - 1500 BC Phoenicians The Return of Assyria Babylon Takes Over Again	Ethos #100 48		Orchestra - Beethoven	Cezanne Line: Straight, zigzag, curved, thin, thick	Humility - Cleanliness
Dec		Aesop's Fables	Winter-time Stevenson	3000 BC - 500 BC Life in Early Crete The Early Greeks Greece Gets Civilized	Ethos #100 2, 38, 58, 75	Insects - Included in Invertebrates Lady bugs - Spider - Ants Bees	Opera - Beethoven	Cezanne Intro to Shape: Square, rectangle, circle	Honor - Citizenship
Jan		Prince Caspian C.S. Lewis	Winter-time Stevenson	1000 BC - 1AD Sparta- Athens Greek Gods Alexander the Great	Ethos #100 57	Unit 2 The Human Body Skeletal - Muscular Nervous	Instrumental Music - Schubert	Van Gogh Classical Greece: Proportions and Perfection in Art	Truth - Beauty - Goodness
Feb		Prince Caspian C.S. Lewis	Did you Ever Stein	300 BC - 1AD The Rise of Rome The Roman Empire	Ethos #100 11, 63	5 Senses Circulatory - Respiratory Digestive	Ballet Schubert	Van Gogh (optional DuFay, Giotto) - Portrait	Justice - Service
March		Tales from the Odyssey Osborne	Encouragement Hess	300 BC - 33AD The Rise of Julius Caesar -Life of Christ	Ethos #100 39, 90	Teeth Urinary Immune	Schubert	Van Gogh (optional DuFay, Giotto) - Early Roman Mosaics	Moderation- Generosity
April		Ancient Rome and Pompeii Osborne	A Good Play Stevenson	33AD - 500 AD The First Roman Prince The Beginning of Christianity Rome Begins to Weaken	Ethos #100 1	Unit 3 - Leaves Flowers Fruits and seeds	Schubert	Van Gogh (optional DuFay, Giotto) - Landscape	Integrity - Loyalty
May		Who Was Julius Caesar? Medina	At the Seaside Stevenson	33AD - 500 AD The Attacking Barbarians The End of Rome	Ethos #100 49, 75	Nuts cones and spores Stems roots	Schubert	Van Gogh (optional DuFay, Giotto)	Courage - Trust

1st Grade ENGLISH Curriculum Map

1st	Grammar	Vocabulary	Emergent Readers (Lit)	Writing
Aug	Capital Letters; Vowels; Reading Words; Writing Sentences Print all upper – and lowercase letters.	Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as understanding how the word is used in a sentence; analyzing the word's sounds, spelling, and meaningful parts; and consulting glossaries or beginning dictionaries, both print and digital.	Progress from simple to more complex skills (cvc, short vowel, blends, digraphs, long vowels, silent e, vowel teams) in oral phonological awareness exercises.	Set up Writer's Workshop - BeginJournal / Copybook , Topic Sentence (Interactive Notebook - Ideas)
Sept	Silent "e"; Vowels; Reading Words; Writing Sentences Advanced - use singular and plural nouns with matching verbs in simple sentences (e.g., He hops, we hop). Capitalize names, places and dates.	Use a known word as a clue to meaning of an unknown word with the same root (photograph, photosynthesis).	Demonstrate proficiency in naming the letters of the alphabet and their corresponding sounds (consonants, long and short vowels). a. Orally distinguish long from short vowel sounds in spoken single-syllable words. (e.g. /tap/vs./tape/, /sock/vs./soak/, /sit/vs./sight/.	Recognize that the dictionary and glossary are arranged in alphabetical order and locate words in a dictionary.
Oct	Types of Sentences Advanced - use subject, object, and possessive pronouns in speaking and writing (e.g., I, me, my, they, them, their). Advanced - use verbs to convey a sense of past, present and future in writing and speaking (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home).	Continue study of Latin and Greek root words.	Accurately identify spoken words, syllables, and phonemes. a. Physically break down sounds in words and syllables (clap, tap sounds and syllables).	Copy sentences from primary sources, or literature.
Nov	Types of Sentences Advanced - understand and use frequently occurring prepositions in English (e.g., during, beyond, toward).	Interpret figurative language, including similes and metaphors.	Add or subtract individual phonemes in simple, one-syllable words to make new words (e.g., /at/ - /sat/ - /mat/. Substitute final consonant in rime to make new words (e.g., /mat/ - /map/). - create word families using more complex vowel teams, consonant blends, trigraphs (/bow/-/how/-/cow/; /bridge/-/ridge/; /catch/-/hatch//match/).	Notice and use capital letters and beginning punctuation.
Dec	Nouns; Pronouns; Plurals Advanced - produce and expand complete declarative, interrogative, imperative, and exclamatory sentences in response to prompts and questions.	Explain the meaning of common idioms, adages, and proverbs.	Orally produce single-syllable and multi-syllable words by blending phonemes, including consonant blends, suffixes and prefixes (e.g./cats/, /black/ blast/, /going/, /redo/, /stopped/). Isolate and pronounce initial, medial phonemes in spoken single-syllable words. (e.g. fast, fast, fast.) vowel, and final	Define sentences as a communication of an idea that starts with a capital letter and ends with punctuation.
Jan	Vowel Suffixes with Silent "e"; Topic Sentences; Compound Words Advanced - use end punctuation for sentences, including periods, question marks, and exclamation points.	Build real-life connections between words and their various uses and meanings.	Segment spoken single-syllable words into their complete sequence of individual phonemes (e.g., lap: /l/ /a/ -/p/ -/ t/ -/l/ -/a/ -/p/). - Demonstrate proficient phonemic awareness by isolating and pronouncing the initial, medial vowel, and final phonemes (sounds) in three-phoneme (CVC) words. (e.g./ dog/, /hat/)	Memorize and recite the definition of the parts of speech .
Feb	One Syllable Vowel Suffixes; Adjectives; Verbs; Friendly Letters; Prefixes Advanced - use commas in dates and to separate single words in a series	Define relationships between words (e.g., how smirk is like and unlike smile).	Understand that letters and sounds are related and based on the code of the English Language. - Learn a scope and sequence of phonics skills from simple to more complex (cvc, short vowels, blends, digraphs, silent e, vowel teams, syllables, morphology). - Engage in meaningful practice (reading, writing, speaking) for learned phonics rules and word patterns.	Work from left to write, top to bottom. - correct manuscript letter formation and maintain correct handwriting position. - directionality d. spacing - upper and lower case letters. - ending punctuation.
March	Comparative Adjectives; Adverbs; Compound Sentences; Conjunctions; Paragraphs Advanced - understand that, minimally, every sentence must be about something (subject) and tell something (predicate) about its subject.	Distinguish a word from other words with similar but not identical meanings. (synonyms)	Know the spelling-sound correspondence for common consonant digraphs (two letters represent one sound, e.g., ch, wh, th, sh). - Decode regularly spelled one-syllable words (e.g., lock, much, see, rain, slide, bake). - Know final -e (e.g. take, side) and common vowel team conventions (e.g., rain, day, week, seat, road, show) for representing long vowels.	mark answers (underline, draw a line across). - use of commas, apostrophes, and question marks.
April	Descriptive Paragraphs; Subject-Verb Agreement; Punctuation Marks with Quotation Marks Advanced - use conventional spelling for words with common spelling patterns and for common irregular words.	Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.	Know r-controlled vowels, diphthongs (eg: car, boil). e. Know common syllable types (closed, open, vce, vowel team, r-controlled vowels, consonant-le). f. Use knowledge that every syllable must have a vowel sound to determine the number of syllables in a printed word. g. Decode two syllable words following basic patterns (e.g., rabbits) by breaking the words into syllables. Know the sound correspondence for hard and soft/c/and/g/ (c or g followed by an e, l, or y make the soft sound of the letter).	
May	Identifying Parts of Speech; Review Spelling Words Advanced - use phonetic spelling for untaught words, drawing on phonemic awareness and spelling conventions. - form new words through addition, deletion and substitution of sound and letters (e.g.an—man—mat—mast—must— rust—crust).		Use frequently occurring inflections and affixes (ed, -s, re-pre-, -ful, -less) to determine word meanings through basic morphology. - Recognize and read gradeappropriate irregularly spelled words (e.g., said, were, could, would, their, there, through, none, both). - Accurately decode unknown words that follow learned letter/sound spelling patterns. Read at least 100 high frequency words by sight (e.g.: Fry, Dolch lists.)	

2nd Grade OUTLINE Curriculum Map

2nd	Literature	Ind Read - Read Aloud	Recitations	History (Ancient)	Ethos 100	Science (Earth)	Composer	Artists	Virtues
Aug	Vacation Under the Volcano Mary Pope Osborne	The Jungle Book R. Kipling	The Arrow and the Song Longfellow	400 - 500 AD Fall of Rome -Barbarians (Beowulf), Christianity comes to Britain	Ethos #100 - 23, 64, 92	Week 1-3 Welcome To Science - Expose scholars to the Basics (Optional) Unit 1: Planet Earth: Oceans, Rivers, and lakes, Biomes	Orchestra Families; Elements of Music Mozart	Raphael Palestrina and DaVinci	Intro to Values & Virtues Excellence - Respect
Sept	Vacation Under the Volcano Mary Pope Osborne	Call it Courage A. Sperry	Where Go the Boats RL Stevenson	500 - 600 AD Byzantine Empire Rise of Islam	Ethos #100 - 8	Earthquakes and Volcanoes Mountains, Islands, and Glaciers Caring for the Earth	Basic Notation, Elements of Music Mozart	Raphael Palestrina and DaVinci	Silence - Order
Oct	Viking Ships at Sunrise Mary Pope Osborne	Voyage of the Dawn Trader C.S. Lewis	The Land of Counterpane RL Stevenson	600 - 700 AD Dynasties of China Japan	Ethos #100 - 41,77,89	Weather: The Sun and Atmosphere Seasons and Climates Weather and Wind	Carols & Concert Repertoire; Elements of Music; Performance & Listening Skills Mozart	Raphael Palestrina and DaVinci Art of Japan: The Great Buddha; landscape gardens	Resolution or Perseverance (Grit) -
Nov	Viking Ships at Sunrise Mary Pope Osborne	Voyage of the Dawn Trader C.S. Lewis	The Land of Counterpane RL Stevenson	700 - 800 AD Norseman, Viking First Kings of England	Ethos #100 - 50	Water Cycle and Clouds Storms and Rain Extreme Weather	String Instruments Mozart	Raphael Palestrina and DaVinci	Humility - Cleanliness
Dec	The Minstrel in the Tower Gloria Skurzynski	The Wind in the Willows Kenneth Grahme	The Wind RL Stevenson	800 - 1000 AD England After Conquest Kings and Samurai	Ethos #100 - 40, 66	Rocks and Fossils: Rocks, Soil Minerals, and Caves Types of Rocks Weathering More on Rocks	Percussion Instruments Mozart	Raphael Palestrina and DaVinci	Honor - Citizenship
Jan	Robin Hood (adventures of) Ann McGovern	The Cricket in Times Square George Seldon	Forest of Moonlight Mary Shepherd	1000 - 1400 AD Ottoman Empire Black Plague	Ethos #100 - 19, 42, 65	Fossils Types of Fossils	Keyboard Instruments Bach	Johannas Vermeer	Truth - Beauty - Goodness
Feb	Robin Hood (adventures of) Ann McGovern	The Cricket in Times Square George Seldon	The Moon RL Stevenson	1400 - 1500 AD Martin Luther's The Reformation	Ethos #100 - 25, 26	The Solar System: The Solar System, The Sun, Mercury Venus	Keyboard Instruments Bach	Johannas Vermeer	Justice - Service
March	The Whipping Boy Sid Fleischman	The Door in the Wall de Angeli	My Shadow RL Stevenson	1500 - 1600 AD A New World - EXPLORATION	Ethos #100 - 5, 98	Earth and Moon Mars Jupiter, Saturn, Uranus, Neptune, Dwarf Planets	Review Elements, Works, Genres, and Songs Bach	Johannas Vermeer Renaissance architecture: the Cathedral	Moderation- Generosity
April	Stage Fright on a Summer Night M.P. Osborne	Gulliver's Stories Jonathan Swift	My Shadow RL Stevenson	1600 -1700 AD The Enlightenment Thinkers Shakespeare 1st Industrial Rev	Ethos #100 - 4, 79, 80	Stars and Space: Stars - Constellations part 1 &2	Improvisation and Composition Bach	Johannas Vermeer Renaissance Art: Michelangelo's Sistine Chapel	Integrity - Loyalty
May	Stage Fright on a Summer Night M.P. Osborne	Bard of Avon Diance Stanley	A Fairy Song Shakespeare	1600 -1700 AD The Enlightenment Thinkers Shakespeare 1st Industrial Rev	Ethos #100 - 4, 91	Stars and Space: Stars - Constellations part 1 &2 Telescopes and Satellites Trips to Space	Bach	Johanna Vermeer Renaissance Art: influence of Greek and Roman art	Courage - Trust

2nd Grade ENGLISH Curriculum Map

2nd	Grammar	Vocabulary (Skills)	Literary Analysis	Writing
Aug	Begin Learning the Different Rules of the English Language <i>Advanced</i> - form common irregular plural nouns (e.g., feet, children, teeth)	Demonstrate understanding of multisyllabic words and their parts orally a. identify root word (jumped, jump is the root word, ed is the suffix) orally b. identify affixes orally; (reread, re is the prefix, read is the root; going, go is the root, ing is the suffix).	Reading Comprehension: 1. Distinguish long and short vowel sounds 2. Decoding 3. Chunking 4. Fluency-Phrasing (parsing), automaticity, intonation, expression (prosody) 5. High frequency and sight word recognition 6. Use context to confirm or self-correct word recognition and understanding, rereading as necessary. 7. Decode words with common prefixes and suffixes.	Set up Writer's Workshop - Begin Journal / Copybook , Topic Sentence (Interactive Notebook - Ideas)H3:H6 <i>come to blows, Don't cry over spilt milk</i>
Sept	Types of Sentences - Nouns, Verbs, and Pronouns <i>Advanced</i> - capitalize holidays, product names, geographic names, and important words in a title.	Identify common syllable types by orally dividing syllables (rab/bit, rep/tile, tu/lip, etc.)	Identify the main idea and theme of a text, including fairy tales, fables, myths, parables, stories, and nonfiction texts.	Copy sentences or short paragraphs from , literature, or works of history; listen to an oral recitation and write down a sentence from works of history, or literature. <i>blind spot, Don't give up your day job</i>
Oct	Types of Sentences - Nouns, Verbs, and Pronouns <i>Advanced</i> - form the past tense of common irregular verbs (e.g., sat, hid, and told).	Understand that letters and sounds are related and based on the code of the English Language. - Learn a scope and sequence of phonics skills from simple to more complex (cvc, short vowels, blends, digraphs, silent e, vowel teams, syllables, morphology). - Engage in meaningful practice (reading, writing, speaking) for learned phonics rules and word patterns.	Speaking and Listening Skills: 1. Active listening 2. Body language 3. Balancing conversation 4. Staying on topic 5. Questioning 6. Offering new perspective 7. Elaborating 8. Keeping conversation moving 9. Thinking flexibly	Use capital letters, beginning punctuation, contractions, and begin to purposefully choose wording for particular meaning (synonyms, antonyms, transition words). <i>a tall order, Don't put all your eggs in one basket</i>
Nov	Adjectives, Adverbs, and Conjunctions - Compound Sentences <i>Advanced</i> - use commas in greetings and closing letters.	Distinguish long and short vowels when reading regularly spelled one-syllable words (e.g., hop vs. hope). - Know spelling sound correspondence for additional common vowel teams (e.g., loud, cow, look, loop, boy, boil). - Decode words with common prefixes and suffixes (e.g., unhappy, carefully, goodness) and know common morphological meanings (re means to do again, un means not).	Identify chronological order of a storyline. Identify most important details from a text or read aloud.	Understand and use the four different types of sentences. <i>pros and cons, Every cloud has a silver lining</i>
Dec	Prepositions- Subject-Verb Agreement <i>Advanced</i> - produce and expand complete declarative, interrogative, imperative, and exclamatory sentences.	Know common syllable types (closed, open, vce, vowel team, rcontrolled vowels, consonant-le). Decode regularly spelled two-syllable words with long vowel sounds (e.g., surprise, remain, needle, baby).	Predict events in a story using rationale for prediction.	Memorize, recite, and identify the definition of the parts of speech. <i>silver spoon, Get a taste of your own medicine</i>
Jan	Work on Forming Paragraphs <i>Advanced</i> - use apostrophes to form contractions and common possessives.	Recognize and read grade appropriate irregularly spelled words (e.g., thought, eyes, busy, ocean, island, people). - Know silent letter combinations (kn, wr, gn, rh, mb). - Know final, stable syllables (-ture, sure, -ion, -tion, sion). -	Literary Understanding (Fiction): 1. Determining central message, lesson, or moral 2. Ask and answer questions 3. Summarizing and retelling 4. Using a word in correct context 5. Identify similarities and differences 6. Visualizing 7. Drawing conclusions 8. Support ideas with evidence 9. Inferring 10. Determining importance 11. Story Elements	 <i>by hook or by crook, Give someone the cold shoulder</i>
Feb	Practice Paragraph Formation and Grammar Rules <i>Advanced</i> - produce and expand complete sentences to provide requested detail or clarification.	Decode words with /r/ controlled vowels. - Identify antonyms, synonyms, and homonyms. - Read multisyllabic words accurately and fluently. - Recognize and read correctly formed contractions. - Read at least 200 high frequency words by sight (e.g.: Fry, Dolch lists).	Identify the setting of a story. Identify the characters in a story and the relationships between the characters.	Demonstrate the ability to use conventions of print such as the following in meaningful writing activities: - correct letter formation (manuscript and cursive) and maintain correct handwriting position. - capitalization - punctuation <i>scrape the bottom of the barrel, Barking up the wrong tree</i>
March	Begin Diagramming Sentences <i>Advanced</i> - consult reference materials, including beginning dictionaries, as needed to check and correct spelling.	Identify and differentiate fiction and nonfiction text features and use features to gain information. b. Use various text features to gain information and efficiently locate key facts from the text (captions, bold print, subheadings, glossaries, indexes, electronic menus, icons.)	Identify characteristics of characters who make virtuous or unvirtuous choices in a read aloud.	 <i>no spring chicken, Birds of a feather flock together</i>
April	Begin Forming Miniature Essays <i>Advanced</i> - identify use of quotation marks in dialogue.	Read with sufficient accuracy, fluency, expression, and natural pace to support comprehension. a. Read on-level text with purpose and understanding. b. Orally read onlevel texts accurately, with proper expression, and natural pacing.	Review Literary Comprehension (Fiction): 1. Determining importance 2. Identify similarities and differences 3. Summarizing and retelling 4. Ask and answer questions 5. Synthesizing 6. Visualizing 7. Making connections 8. Using a word in correct context 9. Understanding how words work 10. Decoding 11. Reading process	 <i>rain or shine, Bite off more than you can chew</i>
May	Review Grammar	c. On successive readings, fluently decode words in on-level texts. Ability to selfcorrect based on meaning, word recognition, punctuation, and understanding for on-level texts. e. Model fluent reading through read aloud.		 <i>on top of the world, Break the ice</i>

3rd Grade OUTLINE Curriculum Map

3 rd	Literature	Read Aloud - Ind Reading	Recitation	History (Ancient)	Ethos 100	Science (Chemistry)	Artist	Composer	Virtues
Aug	Robinson Crusoe (Classic Starts) Daniel Defoe	Two Mighty Rivers: Son of Pocahontas (Legend of Pocahontas) Mari Hanes	Results and Roses Edgar Guest	1500 - 1600 Early America - Pre Columbus - From Inca to Mya to American Indian tribes.	Ethos #100 23,64, 92	Week 1-3 Welcome To Science - Expose scholars to the Basics (Optional) Atoms and Molecules Molecules Air Water	Basic Notation - George Frederic Handel	Rembrandt How elements of art work together	Intro to Values & Virtues Excellence - Respect
Sept	Robinson Crusoe (Classic Starts), Defoe	Two Mighty Rivers: Son of Pocahontas (Legend of Pocahontas) Mari Hanes	Geography Eleanor Farjeon	1600 - 1618 New Beginnings (Early Settlement in America) - Jamestown - Triangular Slave Trade - Pilgrims	Ethos #100 8	Periodic Table Elements Alkali Alkaline Transition metals	Basic Elements - George Frederic Handel	Rembrandt	Silence - Order
Oct	The Courage of Sarah Noble Alice Dalgliesh	The Silver Chair C.S. Lewis	Some One Walter de la Mare	1618 - 1650 Tragedy & Destruction - Thirty Years' War - Battle, Fire and Plague in England	Ethos #100 41, 77, 89	Periodic Table Boron - Carbon - Nitrogen Oxygen - Halogens Noble gases Lanthanides Actinides	Brass Instruments - George Frederic Handel	Rembrandt	Resolution or Perseverance (Grit) -
Nov	The Last of the Mohicans (Classic Start) James F Cooper	The Silver Chair C.S. Lewis	The Land of Nod Robert Lewis Stevens	1650-1775 Unrest French & Indian War AND 1763-1775 Rebellion Events Stamp Act, Boston Massacre, Continental Congress	Ethos #100 50	Physical Changes States of Matter Changes in States	Horn Concertos - George Frederic Handel	Rembrandt	Humility - Cleanliness
Dec	The Last of the Mohicans (Classic Start) James F Cooper	Matchlock Gun Walter D. Edmonds	If I Were King A.A. Milne	1763-1775 Rebellion - Stamp Act, Boston Massacre, Boston Tea Party, Paul Revere, Continental Congress	Ethos #100 40, 66	Physical Changes Liquid Behavior Gas Behavior	Woodwinds George Frederic Handel	Rembrandt	Honor - Citizenship
Jan	The Last of the Mohicans (Classic Start) James F Cooper	Ben and Me: An Astonishing Life of Benjamin Franklin and His Good Mouse Amos Lawson	America Samuel Smith	1775-1781 Revolution! - Declaration of Independence, Washington Crossing the Delaware	Ethos #100 19, 42, 65	Chemical Changes Bonding Chemical Reactions Types of Reactions Oxidation Reduction	Rachmaninoff - vocal technique, posture, breathing; elements of music	Monet and Jacques-Louis David (Optional)	Truth - Beauty - Goodness
Feb	The Sign of the Beaver Elizabeth G. Speare	Indian Captive: The Story of Mary Jemison Lois Lenski	Preamble to the Constitution	1781- 1789 A New Country - Constitution, First President, Three Branches of Government	Ethos #100 25, 26	Measuring Unit Mixtures Separating Mixtures Crystals	Rachmaninoff	Monet and Jacques-Louis David (Optional)	Justice - Service
March	Toliver's Secret Ester Brady	Indian Captive: The Story of Mary Jemison Lois Lenski	Star Spangled Banner, vs.1 Scott Key	1789- 1815 Another Revolution (French Revolution) The Reign of Terror, Rise and Fall of Napoleon Bonaparte	Ethos #100 5, 98	Acid and Basis pH Salts Scientist studies	Rachmaninoff	Monet and Jacques-Louis David (Optional)	Moderation- Generosity
April	Toliver's Secret Ester Brady	Hans Christian Andersen The Complete Fairy Tales and Stories	Star Spangled Banner, vs.1 Scott Key Bed in Summer	1803 - 1849 Movement (Westward Expansion) Louisiana Purchase War of 1812 - Monroe Doctrine - Gold Rush	Ethos #100 4, 79, 80	Organic Chemistry - Compounds, Alcohol Esters,	Rachmaninoff	Monet and Jacques-Louis David (Optional)	Integrity - Loyalty
May	Souder William H. Armstrong	Amos Fortune, Free Man Elizabeth Yates	Bed in Summer RL Stevenson	1808 - 1850 Injustice - Slavery/Abolitionists - Missouri Compromise - Trail of Tears - Nat Turner's Revolt	Ethos #100 4, 91	Organic Chemistry - Hydrocarbons Polymers plastics	Rachmaninoff	Monet and Jacques-Louis David (Optional)	Courage - Trust

3rd Grade ENGLISH Curriculum Map

3rd	Grammar	Vocabulary	Emergent Readers (Literary)	Literary Analysis	Writing (Cursive)
Aug	Parts of Speech Kinds of Sentences Advanced - explain the function of nouns, pronouns, verbs, adjectives, and adverbs in general and their functions in specific sentences.	Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as understanding how the word is used in a sentence, analyzing the word's sound.		Non-Fiction: 1. Identify the central message in a story 2. Draw conclusions, make predictions, and identify character traits 3. Sequencing, identify cause and effect, make personal connections 4. Identify who is telling the story 5. Ask and answer questions referring to the text for support 6. Explain similarities and differences between themes, settings, plot, and characters within similar text 7. Identify and use figurative language such as idioms and similes	Introduction to the Paragraph Informative Paragraph - Use prewriting strategies a. Pictures b. Webs c. Notecatcher d. Discussion
Sept	Parts of Speech Kinds of Sentences Advanced - identify and use singular and plural nouns, common and proper nouns, and personal pronouns.	Spelling, and meaningful parts; consulting glossaries or beginning dictionaries, both print and digital. - Use unknown root word as a clue to the meaning of an unknown word with the same root (e.g., company / companion).	Understand that letters and sounds are related and based on the code of the English Language. - Leach a scope and sequence of phonics skills from simple to more complex (cvc, short vowels, blends, digraphs, silent e, vowel teams, syllables, morphology). - Engage in meaningful practice (reading, writing, speaking) for learned phonics rules and word patterns.	Identify the main idea and theme of a text, including fairy tales, fables, myths, parables, stories, and nonfiction texts.	Write opinions in which they: - introduce the topic directly, state an opinion relative to the topic, and create and organizing structure that lists reasons. - Research in order to provide reasons that support opinion. c. use appropriate words to link opinions and reasons (e.g., because, therefore, in order, since, for example). - provide sense of closure
Oct	Principal Elements Adverbs Advanced - form and use the simple (e.g. I walked, I walk, I will walk) verb tense.	Begin study of Latin and Greek root words.		Identify chronological order of a storyline, including sequence of a non-chronological text. Identify most important details from a text or read aloud, and explain why those details are important to the story or piece of writing.	Narrative Paragraph -Gather information from experience as well as print and digital resources, take notes on sources, and sort evidence into provided categories.
Nov	Principal Elements Adverbs Advanced - ensure subject-verb and pronoun antecedent agreement.	Determine the meaning of the new word formed when a known affix is added to a known word (e.g., agreeable/disagreeable, heat/preheat)	Identify and know the meaning of the most common prefixes and derivational suffixes (e.g., un-, re-, mis-, ful-, -less, -able.) -. Decode words with common suffixes (e.g., -tion/sion,-ture, -tive/sive, -ify, -ity, -ment). c. Decode multisyllabic words (e.g., supper, chimpanzee, refrigerator, terrible, frightening). -. Read gradeappropriate irregularly spelled words (e.g although, science, stomach, machine).	Review Comprehension; 1. Identify and know the meaning of the most common prefixes and derivational suffixes. 2. Decode words with common Latin suffixes. 3. Decode multisyllable words. 4. Read grade appropriate irregularly spelled words. 5. Read on-level text with purpose and understanding. 6. Read on-level text oral with accuracy, appropriate rate, and expression on successive readings. 7. Use context to confirm or self-correct word recognition and understanding, rereadingas necessary.	Persuasive Paragraph - Use varied vocabulary appropriate to purpose and expand vocabulary in written pieces. Use correct conventions in writing a. Capitalization b. Punctuation c. Spelling d. Grammar
Dec	Subject Pronouns Interrogative Sentences Advanced - differentiate and produce simple, compound, and complex sentences.	Distinguish the literal and nonliteral meanings of words and phrases in context (e.g. take steps).		Identify characteristics of characters who make virtuous or unvirtuous choices in a read aloud, and begin to identify the underlying causes why characters or people do the things they do. Begin to identify which characters are worthy of imitation.	Write informative/explatory pieces in which they: - introduce a topic and create organizational structure that presents information together.
Jan	Object Pronouns Pronoun Review Advanced - identify complete subject and complete predicate in a sentence.	Build real-life connections between words and their use. (e.g., describe people that are helpful or friendly)	Learn morphology; apply knowledge of word parts (roots, affixes) to make and determine the meaning of words. -	Listenin Speaking: Discussions, Active Listening, Body Language, Balancing Conversation, Staying on topic, Questioning, Offering new perspective	Provide some details to develop points. - use linking words (e.g., also, another, and, more) to connect ideas with categories of information. - include a concluding sentence or section.
Feb	Prepositional Phrases-Adverbial Introductory Prepositional Phrases Advanced - identify compound subjects and compound predicates.		Decode words with common roots (e.g., object, reject, propel, repel).	Predict events in a story using rationale for prediction.	Informative Paragraph - Craft purposeful and artful sentences in response to reading or prompt b. write a paragraph in response to reading or prompt
March	Compound Subjects Compound Verbs	Distinguish among related words that describe states of mind or degrees of certainty (e.g., knew, believed, suspect, heard, wondered).	Identify antonyms, synonyms, and homonyms. -. Read multisyllabic words accurately and fluently.	Identify the setting of a story and explain why the setting is important to the storyline. Identify the characters in a story, the relationship between the characters, and the importance of those relationships.	Write narratives in which they: -. orient the reader by establishing a situation, introduce a narrator and/or characters, and organize an event sequence - develop narrative elements (e.g., setting, event sequence, sequence of events. -. use concrete and sensory words and phrases to convey events and experiences precisely. - provide a strong conclusion that follows from the narrative's events. - use a variety of temporal words and phrases to manage the
April	Compound Verbs Compound Direct Objects Advanced - identify the four types of sentences (declarative, interrogative, exclamatory and imperative).	Use words that are in common, conversational vocabulary as well as grade-appropriate academic vocabulary and domain-specific words (in English language arts, history/social studies and science) taught directly and acquired through reading and responding to texts.	Read and create correctly-formed contractions.	Review Comprehension; 1. Identify and know the meaning of the most common prefixes and derivational suffixes. 2. Decode words with common Latin suffixes. 3. Decode multisyllable words. 4. Read grade appropriate irregularly spelled words. 5. Read on-level text with purpose and understanding. 6. Read on-level text oral with accuracy, appropriate rate, and expression on successive readings. 7. Use context to confirm or self-correct word recognition and understanding, rereadingas necessary.	Informational Paragraph - Write in response to literary or informational sources - apply grade 3 reading objectives to writing - Summarizing - Analysis of characters' actions and choices - Distinguish between fact and opinion
May	Punctuation & Review		Read at least 300 high frequency by sight (e.g. Fry, Dolch lists).		Review and Remediation With guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting or trying a new approach.

4th Grade OUTLINE Curriculum Map

4th	Classic Lit	Read Aloud	Recitations	History (Modern)	Ethos 100	Science (Physics)	Artist	Composer	Virtues
Aug	Mr. Lincoln's Drummer G Clifton Wisler	Where The Red Fern Grows Wilson Rawls	The Homework Machine Shel Silverstein	1825-1861 HEADING TOWARDS WAR - Expansion Underground Railroad, Comp 1850, Dred Scott Lincoln/Douglas Debates	Ethos #100 - 27, 84	Week 1-3 Welcome To Science - (Optional)Tools - Intro in Science Matter - Phases - Air and pressure Water and Hard Water Evaporation -Change in State Isaac Newton	Tchaikovsky and Brahms	Degas	Intro to Values & Virtues Excellence - Respect
Sept	Mr. Lincoln's Drummer G Clifton Wisler	Harriet the Spy Louis Fitzhugh	O Captain, My Captain Walt Whitman	1861-1865 THE CIVIL WAR	Ethos #100 - 44	Motion - Inertia Dynamics 2nd Law of Motion - Forces 3rd Law of Motion - Motion	Tchaikovsky and Brahms	Degas	Silence - Order
Oct	Caddie Woodlawn Carol R. Brink	Brighty of the Grand Canyon Marguerite Henry	Foreign Lands RL Stevenson	1865-1914 Post War MOVEMENT Transportation, Immigration, Westward Expansion, Gilded Age Progressivism	Ethos #100 - 15, 60, 68, 81, 82, 88	Simple Machines - Pulleys and Levers, Ramps, Screws Work/Power	Tchaikovsky and Brahms Musical Traditions: Cowboy Songs: "If I Had a Hammer"; "The Happy Wanderer"; "Git Along Little Doggies"; "Sweet Betsy from Pike"	Degas	Resolution or Perseverance (Grit) -
Nov	Caddie Woodlawn Carol R. Brink	The Horse and His Boy CS Lewis	Foreign Lands RL Stevenson	1914-1929 EXCESS and ABUNDANCE - 2nd Industrial Revolution, World War I The Roaring 20's, Prohibition, Jazz, Entertainment, Immigration Restrictions Stock Market Crash	Ethos #100 - 34, 59, 29, 67, 69	Heat Thermometer , calorie, degree - Heat Transfer - radiant energy	Jazz - Big Band George Gershwin	Degas	Humility - Cleanliness
Dec	Heidi Johanna Spyri	The Horse and His Boy CS Lewis	Dreams Langston Hughes	1929-1941 THE BUST The Great Depression, Roosevelt's New Deal	Ethos #100 - 27, 67, 69	Light - Shadows color Refraction, reflection, lens mirror Thomas Edison	Jazz - Big Band George Gershwin	Degas	Honor - Citizenship
Jan	Heidi Johanna Spyri	Sarah, Plain and Tall Patricia MacLachlan	Block City RL Stevenson	1930-1945 NATIONALISM Rise of Dictators World War II Beginning WWII	Ethos #100 - 14, 61, 95, 10, 33	Sound - Sound waves Amplification Musical instruments - resonance	Songs of the U.S. Armed Forces	Jackson Pollock Andy Warhol	Truth - Beauty - Goodness
Feb	The Big Wave Pearl Buck	The Indian in the Cupboard Lyne R Banks	At The Zoo AA Milne	1941-1945 WORLD WAR II America enters - Pacific theater Hiroshima Marshall Plan	Ethos #100 - 12, 35, 36, 96, 56, 62, 73	Balancing - Center of Gravity Balancing points	Swing Era - Showtunes	Jackson Pollock Andy Warhol	Justice - Service
March	Number the Stars Lois Lowry	A Wrinkle in Time Madeleine L'Engle	Summer Sun RL Stevenson	1945-1961 COLD WAR - Baby Boom, Suburbs, Automobiles, Korean War Civil Rights Movement The Cold War, Eisenhower	Ethos #100 - 9, 17, 32, 72, 83, 94	Magnets - Electromagnetism - Electricity Conductors, insulators circuits - Spin - Torque Yo Yo - Centripetal force Frisbee	Pop - 50s Be Bop - Elvis	Jackson Pollock Andy Warhol- Other Pop Art	Moderation- Generosity
April	Roll of Thunder Hear Me Cry Mildred Taylor	The Phantom Tollbooth Norton Juster	Summer Sun RL Stevenson	1961-1973 TURBULENT 1960'S Kennedy, Space Race, Vietnam, Woodstock, Civil Rights	Ethos #100 - 45, 14, 46, 85	Energy - potential and kinetics Batteries, pendulum energy Wind power Rockets	Pop - 60s Woodstock - Beatles	Jackson Pollock Andy Warhol- Other Pop Art	Integrity - Loyalty
May	Roll of Thunder Hear Me Cry Mildred Taylor	The Borrowers Mary Norton	High Flight Gillespie Magee Jr.	1973 -To 9/11 AGE of TERRORISM - 1970's, Watergate, Terrorism, Iran Hostage, Reagan, 9/11	Ethos #100 - 20, 21, 71, 87, 13, 31, 47, 86, 97, 22, 99	Gravity - And/Or - Review - End of Year Project	1970s - Top 40 - Pop	Jackson Pollock Andy Warhol- Other Pop Art	Courage - Trust

4th Grade ENGLISH Curriculum Map

4th	Grammar	Vocabulary (Skills)	Literary Analysis	Writing
Aug	Principal Elements Diagramming Adverbs Advanced - form and use the progressive (e.g., I was walking, I am walking, I will be walking) verb aspects.	Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as using, semantic clues (e.g., definitions, examples, or restatements in text); using syntactic clues (e.g., the word's position of function in a sentence); analyzing the word's sounds, spelling, and meaningful parts; and consulting reference materials, both print and digital.	Identify specific vocabulary that helps enhance the meaning of a text. Text contains multiple ways to help readers understand words in a text.	Write opinions in which they: - introduce an opinion about a concrete topic and create an organizing structure where related ideas are grouped to support the writer's purpose. - Research in order to provide reasons that are supported by facts and details. - link reasons and details together using words and phrases (e.g., so, then, for instance, in addition). - provide a concluding statement or section. adopt an appropriate style for sharing and defending an opinion.
Sept	Adverbs/Adjectives Advanced - form and use adjectives and adverbs (including comparative and superlative forms) placing appropriately within sentences.	Use known root word as a clue to the meaning of an unknown word with the same root (e.g., telegraph, photograph, autograph).	Identify the main idea and theme of a text, including fables, myths, parables, stories, and nonfiction texts (integrated within content learning across the content areas).	Produce coherent and clear writing in which the organization, development, substance, and style are appropriate to task, purpose, and audience. a. Craft purposeful and artful sentences to connect the complex relationships of complex ideas b. write paragraphs that synthesize ideas c. write essays that support learning across the curricula
Oct	Predicate Verbs/Direct Objects Predicate Nominative Advanced - produce complete sentences, avoiding rhetorically poor fragments and run-ons.	Continue study of Latin and Greek root words.	Skills/Competencies: 1. Locate and Cite Evidence 2. Make Connections 3. Visualize 4. Draw Conclusions 5. Predicting 6. Story Arch: Characters Setting	Use prewriting strategies a. Pictures b. Webs c. Notecatcher d. Discussion
Nov	Predicate Adjectives/Predicate Review/Possessive Nouns Advanced - correctly use frequently confused words (e.g., to, too, two, there, their).	Explain the meaning of simple similes and metaphors (e.g. pretty as a picture).	Describe the relationships among different ideas or events in a text to summarize these by time, sequence, and cause/effect. Define symbolism and identify an author's use of symbolism.	Write informative/explanatory pieces in which they: - state the topic clearly and group related information in paragraphs and sections. - develop the topic using facts, concrete details, quotations, or other information and examples. - use appropriate linking words and transition words to join ideas within categories of information. - provide a conclusion related to the information or explanation offered. - employ domain-specific vocabulary when appropriate. - identify the need for correct citation of sources to avoid plagiarism.
Dec	Prepositional Phrases/Compound Elements Advanced - use and punctuate declarative, interrogative, exclamatory and imperative sentences.	Paraphrase common idioms, adages, and proverbs.	Non-Fiction: Text contains at least one theme that can be supported multiple ways. Text evidence can be used to answer literal and inferential questions. Literary elements can be identified throughout the text. Compare and Contrast viewpoints in a text/texts using text evidence	Gather information from print and digital resources, take notes on sources, and sort evidence into categories. a. provide basic bibliographic information using MLA format.
Jan	Subject Pronouns/Object Pronouns Advanced - differentiate between and write simple and compound sentences.	Build real-life connections between words and their various uses and meanings.	Identify most important details, including specific vocabulary, from a text or read aloud, and explain why those details are important to the story or piece of writing. Identify the mood and tone of a text.	Write narratives in which they: - orient the reader by establishing a plot, introduce a narrator and/or characters, and organize an event sequence - develop narrative elements (e.g., setting, event sequence, characters) - use a variety of temporal words and phrases to manage the sequence of events. - use concrete and sensory words and phrases to convey events and experiences precisely. - provide a strong conclusion that follows from the narrative's events.
Feb	Possessive Pronouns/Interrogative Pronouns Advanced - identify and use the following parts of speech: singular and plural nouns, common and proper nouns, personal pronouns, possessive pronouns.	Define relationships between words (e.g., how ask is like and unlike demand).	Use poems, prose and drama that have specific text structure	Use correct conventions in writing a. Capitalization b. Punctuation c. Spelling d. Grammar
March	Compound Sentences Advanced - identify the person, case, gender, and number of nouns. - identify and use irregular verbs. - identify and use prepositions.	Distinguish a word from other words with similar but not identical meanings (synonyms).	Use character analysis and identification of important details to make informed predictions. Explore how the setting influences the plot development, tone, and themes of a narrative.	Write in response to literary or informational sources a. apply grade 4 reading objectives to writing b. Summarizing c. Analysis of characters' actions and choices d. Distinguish between fact and opinion e. Introduce argumentative writing
April	Relative Pronouns/Relative Clauses Advanced - identify and use interrogative pronouns (who, whom, what, which).	Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.	Review - Main idea and details 1.Summarize 2.Make Inferences 3.Text Evidence 4.Cause/effect 5.Point of View 6. Text Structures 7.Figurative Language8. Context Clues	With guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting or trying a new approach.
May	Comma; quotation mark; apostrophe Advanced - identify, define and use adjectives. - identify and use the appropriate tense of regular verbs. identify and use linking/state of being verbs.		Identify noble characteristics of persons studied in fiction and nonfiction, and identify the underlying causes of why characters or people do the things they do. - Identify which characters are worthy of imitation.	

5th Grade OUTLINE Curriculum Map

5th	Brit Lit	Read Aloud	Recitation	History (Ancient)	Ethos 100	Science (Bio)	Artist	Composer	Virtues
Aug	The Golden Goblet Elois McGraw	Gilgamesh the Hero	Try, Try Again T. H. Palmer	6000 BC - 3000 BC Intro: What is Archeology The Earliest People/Mesopotamia - Egypt	Ethos #100 - 4, 91	(Optional) Week 1-3 Welcome To Science - Expose scholars to the Basics - Cell Structure - DNA - Animal/Plant	Chopin Basic Notation and Elements	Michelangelo Renaissance -Ancient Roman sculptures and paintings	Intro to Values & Virtues Excellence - Respect
Sept	Aesop's Fables	Two Mighty Rivers: Son of Pocahontas (Legend of Pocahontas) Hanes	Four Season Cecil Alexander	3000 BC - 1500 BC Old Testament - Egypt Sumerian Dictator Hammurabi Babylonians Assyrians	Ethos #100 - 18, 31	Classification -(Vertebrate - Invertebrate - Mammal) Habitat and animal behaviour Mammals - 8 Part Unit Birds	Chopin Renaissance Music	Michelangelo Renaissance Art/Sculpture	Silence - Order
Oct	Wild Orchid Cameron Dokey	Old Yeller Fred Gipson	The Grass Emily Dickinson	3000 BC - 1500 BC The Far East: Ancient China	Ethos #100 - 3, 74, 77	Reptiles - Snakes - Lizards	Chopin	Michelangelo Art of Japan	Resolution or Perseverance (Grit) -
Nov	Black Ships Before Troy Rosemary Sutcliff	Tales of Greek Heroes Roger L Green	November Alice Cary	3000 BC - 1500 BC Phoenicians The Return of Assyria Babylon Takes Over Again	Ethos #100 - 48	Fish - Invertebrates (Crustaceans) Insects - (adaptation, camo, cycles, Not Extensive In Textbook	Chopin Spirituals	Michelangelo	Humility - Cleanliness
Dec	Black Ships Before Troy Rosemary Sutcliff	Tales of Greek Heroes Roger L Green	Ozymandias Percy Byssie Shelley	3000 BC - 500 BC Life in Early Crete The Early Greeks Greece Gets Civilized	Ethos #100 - 2, 38, 58, 75	Plants Units - Leaves Flowers Fruits and seeds	Chopin	Michelangelo Classical Greece: Proportions and Perfection in Art	Honor - Citizenship
Jan	Eagle of the 9th Rosemary Sutcliff	The Golden Fleece Padraic Colum	Puck's Speech Shakespeare	1000 BC - 1AD Sparta- Athens Greek Gods Alexander the Great	Ethos #100 - 57	Adaptation: Nuts cones and spores Structure/Function: Stems roots	Stravinsky	El Greco	Truth - Beauty - Goodness
Feb	Eagle of the 9th Rosemary Sutcliff	The Golden Fleece Padraic Colum	The Rainy Day Longfellow	300 BC - 1AD The Rise of Rome The Roman Empire	Ethos #100 - 11, 63	The Human Body Unit - Skeletal Muscular	Stravinsky	El Greco	Justice - Service
March	The Bronze Bow Elizabeth Speare	Farmer Giles of Ham J.R.R. Tolkien	Where the Sidewalk Ends Silverstein	300 BC - 33AD The Rise of Julius Caesar -Life of Christ	Ethos #100 - 39, 90	Nervous System (Kinder refresher on 5 senses)	Stravinsky American Songs	El Greco Early Roman Mosaics	Moderation- Generosity
April	The Bronze Bow Elizabeth Speare	Wonder J. R. Palacio	Where the Sidewalk Ends Shel Silverstein	33AD - 500 AD The First Roman Prince The Beginning of Christianity Rome Begins to Weaken	Ethos #100 - 1	The Human Body – Circulatory, Respiratory	Stravinsky American Songs	El Greco	Integrity - Loyalty
May	The Bronze Bow Elizabeth Speare	Wonder J. R. Palacio	The Voice of Spring Mary Howitt	33AD - 500 AD The Attacking Barbarians The End of Rome	Ethos #100 - 49, 75	Experiments - Use the years work to write/present - Wrap up all learning in this month	Stravinsky American Songs	El Greco	Courage - Trust

5th Grade ENGLISH Curriculum Map

5th	Grammar	Vocabulary	Literary Analysis	Writing	Cultural Sayings
Aug	Four Kinds of Sentences Adverbs & Adjectives Advanced - form and use the perfect (e.g., I had walked, I have walked, I will have walked) verb aspects. - recognize and correct inappropriate shifts in verb tense and aspect.	Determine or clarify the meaning of unknown or multiple-meaning words through the use if one or more strategies, such as understanding how the word is used in a sentence; analyzing the word's sounds, spelling, and meaningful parts; and consulting glossaries or beginning dictionaries, both print and digital.	Review - 1. Read rate, fluency. 2. Identify Prefix and Suffix 3. Determine meaning of Prefix or Suffix in context 4. Use letter-sound patterns to read accurately 5. Using morphology read unfamiliar multisyllabic words 6. Read with on-level text with accuracy and fluency 7. Read with appropriate rates and expression	Write opinions in which they: - introduce an opinion about a concrete topic and create an organizing structure where related ideas are grouped to support the writer's purpose. - Research in order to provide reasons that are supported by facts and details. - link reasons and details together using words and phrases (e.g., consequently, generally, specifically). - provide a concluding statement or section - adopt an appropriate style for sharing and defending an opinion.	<i>A blessing in disguise, The elephant in the room, The Love of Money is the Root of All Evil</i>
Sept	Four Kinds of Sentences Adverbs & Adjectives Advanced - use and punctuate declarative, interrogative, exclamatory, and imperative sentences. - identify and use the following parts of speech: singular and plural nouns, common and proper nouns.	Use a known word as a clue to meaning of an unknown word with the same root (photograph, photosynthesis).	Describe the relationships among different ideas or events in a text to summarize these by time, sequence, and cause/effect. Identify most important details, including specific vocabulary, from a text or read aloud, and explain why those details are used to advance the theme to the story or purpose of the writing.	Craft purposeful and artful sentences to connect the complex relationships of complex ideas b. write paragraphs that synthesize ideas c. write essays that support learning across the curricula	<i>A dime a dozen, The whole nine yards, The powers that be</i>
Oct	Predicate Verbs, Nominatives & Adjectives Personal Pronouns Advanced - identify the person, case, gender, and number of nouns. use possessive pronouns and personal pronouns. - identify and use interrogative pronouns (who, whom, what, which).	Continue study of Latin and Greek root words.	Info Text - 1. Skills/Competencies; Determine important information, Find and cite text evidence, Make inferences Report on a topic or present an opinion in logical order, using relevant and appropriate information.	Write informative/explanatory pieces in which they: - Use a topic sentence to state the topic clearly and group related information in paragraphs and sections. - develop the topic using facts, concrete details, quotations, or other information and examples. - use appropriate transition words to join ideas within categories of information. - provide a conclusion related to the information or explanation offered - employ domain-specific vocabulary when appropriate. - identify the need for correct citation of sources to avoid plagiarism. Introduce MLA formatting	<i>Beat around the bush, There are other fish in the sea, The root of the matter</i>
Nov	Sensory Linking Verbs Prepositional Phrases Advanced - identify demonstrative pronouns (this, that, these and those) and indefinite pronouns (e.g. most, some, all, everybody).	Interpret figurative language, including similes and metaphors.	Use details to make inferences about characters, setting, and plot to strengthen understanding while reading. Identify how the setting influences the plot development, tone, and themes of a narrative.		<i>Better late than never, There's a method to his madness, The Writing Is on the Wall</i>
Dec	Indirect Objects Advanced - identify, define and use adjectives.	Explain the meaning of common idioms, adages, and proverbs.	Info Text - 1. Summarize the main points of a text when it is presented using a variety of formats and methods 2. Make connections between and within texts 3. Text structures; Compare and contrast, Chronology, Comparison, Cause/Effect, Problem/Solution	Write in response to literary or informational sources, drawing evidences from the text support analysis and reflection. a. apply grade 5 reading objectives to writing b. Summarizing c. Analysis of characters' actions and choices d. Distinguish between fact and opinion e. Develop arguments based on text	<i>Bite the bullet, There's no such thing as a free lunch, To Fall By The Wayside</i>
Jan	Interrogative Pronouns Relative Clauses Advanced - identify and use appropriate tense of regular verbs.	Build real-life connections between words and their various uses and meanings.	Identify the relationships between characters in a text, the ways character relationships advance the plot and theme of a text, and how a story may be different if told from a different point of view.		<i>Break a leg, Throw caution to the wind, To Have A Millstone Around One's Neck</i>
Feb	Adverbial Elements Adverbial Clauses Advanced - identify and use linking/state of being verbs, auxiliary / helping verbs, irregular verbs, transitive and intransitive verbs.	Define relationships between words (e.g., how smirk is like and unlike smile).	Identify noble characteristics of persons studied in fiction and nonfiction, and identify the underlying causes of why characters or people do the things they do. - Identify which characters are worthy of imitation, with rationale grounded in virtue.	Perform focused research projects that build knowledge through investigation of different aspects of a topic using several sources. a. provide basic bibliographic information using MLA b. Summarize or paraphrase information format. c. Avoid plagiarism	<i>Call it a day, You can't have your cake and eat it too, To Move Mountains</i>
March	Reflexive Pronouns Participles Advanced - identify and use preposition.	Distinguish a word from other words with similar but not identical meanings. (synonyms)	Fiction - 1. Determine the meaning of words and phrases, including figurative language 2. Analyze how authors style elements contribute to meaning, tone, or beauty of a text 3. Compare information from multiple texts in the same genre to demonstrate understanding of themes, topics, and other literary elements 4. Use grade-appropriate conversational, academic, and domain-specific words and phrases	Write narratives in which they: - engage and orient the reader by establishing a plot, introduce a narrator and/or characters, and organize an event sequence that unfolds naturally and logically. - develop narrative elements (e.g., setting, event sequence, characters) - use a variety of temporal words, phrases and clauses to manage the sequence of events. - use well-chosen words and phrases to convey events and experiences. - provide a strong conclusion that follows from the narrative's events.	<i>Cut somebody some slack, You can't judge a book by its cover, To Put Words in Someone's Mouth</i>
April	Infinitives Review Verbals Advanced - identify and use objects of prepositions.	Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.	Describe how an author's perspective may influence the author's work, and identify author's purpose in writing a text. Identify an author's use of symbolism. Identify the mood and tone of a text and the impact of the mood and tone on understanding the text.	Adapt style of writing to purpose a. Argumentative b. Informative c. Narrative d. Poetry e. Correspondence	<i>Cutting corners, By the skin of your teeth, Turn the Other Cheek</i>
May	Types of Sentences Advanced - identify and define the function of parts of speech as elements of sentence structure (simple and complete subject, simple and complete predicate).		Fiction - 1. Read and comprehend grade-level literary fiction 2. Greek/Latin: Affixes and Roots 3. Identify visual elements that contribute to meaning of text 4. Compare multiple texts in the same genre 5. Fluency 6. Accuracy Reread 7. Notetaking	With guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting or trying a new approach.	<i>Easy does it, Comparing apples to oranges, Why are you so bent out of shape?</i>

6th Grade OUTLINE Curriculum Map

6th	Literature	Recitations	History (Ancient)	Ethos 100	Science (Earth)	Artist	Composer	Virtues
Aug	Adam of the Road E Gray Vining	A Song of Enchantment de la mare	400 - 500 AD Fall of Rome -Barbarians (Beowulf), Christianity comes to Britain	Ethos #100 - 23, 64, 92	(Optional) Week 1-3 Welcome To Science - Expose scholars to the Basics - Unit 1: Space, Universe Big Bang Galaxies Stars Constellations	Basic Notation and Elements Monteverdi	Byzantine Mosaics, Paintings, Sculptures Van Eyck	Intro to Values & Virtues Excellence - Respect
Sept	Adam of the Road E Gray Vining	Success Longfellow	500 - 600 AD Byzantine Empire Rise of Islam	Ethos #100 - 8	Unit 2 Solar System Sun Inner planets Earth Moon	Baroque Monteverdi	Islamic art and architecture: domes and minarets; calligraphy - Van Eyck	Silence - Order
Oct	King Arthur and His Knights of the Roundtable R L Green	Travel R L Stevenson	600 - 700 AD Dynasties of China Japan	Ethos #100 - 41,77,89	Outer planets Dwarf planets Comets and meteorites	Classical - Monteverdi	Art of Ancient China: scrolls, calligraphy, porcelain Van Eyck	Resolution or Perseverance (Grit) -
Nov	King Arthur and His Knights of the Roundtable R L Green	Travel R L Stevenson	700 - 800 AD Norseman, Viking First Kings of England	Ethos #100 - 50	Unit 3 Astronomers and their tools. Looking into space Exploring space Satélites	Classical - Monteverdi	Art and architecture of Medieval Europe: Madonnas; tapestries; cathedrals; coats of arms Van Eyck	Humility - Cleanliness
Dec	Samurai's Tale Erik Haugaard	Basho Matsuo (haiku) An old silent pond	800 - 1000 AD England After Conquest Kings and Samurai	Ethos #100 - 40, 66	Unit 4 Geology Maps Mapping Inside earth Volcanoes	Chamber Music Monteverdi	Early Renaissance - Van Eyck	Honor - Citizenship
Jan	Samurai's Tale Erik Haugaard	Can't Guest	1000 - 1400 AD Ottoman Empire Black Plague	Ethos #100 - 19, 42, 65	Earthquakes Rocks Soil Rocks and weathering	Chamber Music - Vivaldi	Durer	Truth - Beauty - Goodness
Feb	The Lion, The Witch, Wardrobe C.S. Lewis (Option 2)	Can't Guest	1400 - 1500 AD Martin Luther's The Reformation	Ethos #100 - 25, 26	Unit 7 - Oceans and Rivers Groundwater Ocean Coral Reefs Glaciers (move to align more effectively)	Medieval Music: Gregorian chant - Vivaldi	Durer Gothic Architecture: The Great Cathedrals	Justice - Service
March	The Lion, The Witch, Wardrobe C.S. Lewis (Option 2)	Sonnet 18 Shakespeare	1500 - 1600 A New World - EXPLORATION	Ethos #100 - 5, 98	Unit 5 - Climate Atmosphere and Currents, Natural Cycles Climates	Romantic Period- Vivaldi	Durer	Moderation- Generosity
April	Treasure Island RL Stevenson	The Things That Haven't Been Done Before Edgar Guest	1600 -1700 AD The Enlightenment Thinkers Shakespeare 1st Industrial Rev	Ethos #100 - 4, 79, 80	Rainforests Monsoon Tropical forests and Deserts Temperature and Polar regions	Vivaldi	Durer	Integrity - Loyalty
May	Treasure Island RL Stevenson	'You are old, Father William' (1865) Lewis Carroll	1600 -1700 AD The Enlightenment Thinkers Shakespeare 1st Industrial Rev	Ethos #100 - 4, 91	Unit 6 Weather and Clouds, Thunder and wind storms Extreme weather Forecasting	Vivaldi	Durer Renaissance Art: influence of Greek and Roman art;	Courage - Trust

6th Grade ENGLISH Curriculum Map

6th	Grammar	Vocabulary (Skills)	Literary Analysis	Writing	Cultural Sayings
Aug	Adverbs & Adjectives Predicate Verbs, Predicate Nominatives, and Predicate Adjectives Advanced - Ensure that pronouns are in the proper case (subjunctive, objective, possessive). - Recognize and correct inappropriate shifts in pronoun number and person. - Recognize and correct vague pronouns (e.g., ones with unclear or ambiguous antecedents).	Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as understanding how the word is used in a sentence, analyzing the word's sound. Spelling, and meaningful parts; consulting glossaries or beginning dictionaries, both print and digital.	Info Text 1. Infer the author's purpose and point of view in a text and explain techniques the author uses to create them as well as their role in shaping the content and style of the text to achieve the author's purpose. 2. Break down texts to analyze the use of a given component (phrase, sentence, or paragraph) to develop a specific idea. 3. Understand pivotal vocabulary for the grade level, both domain-specific and general academic, including multiple-meaning words and phrases, on the basis of context.	Write arguments in which they: - introduce a claim about a topic or issue, acknowledge alternate or opposing claims, and organize the reasons and evidence logically to support the claim.-Research in order to support the claim with logical reasoning and detailed, relevant evidence that demonstrates a comprehensive understating of the topic. - use words, phrases, and clauses to convey relationships among claims and reasons. ...	<i>Do something at the drop of a hat, Eat, Drink, & Be Merry, gesundheit</i>
Sept	Adverbs & Adjectives Predicate Verbs, Predicate Nominatives, and Predicate Adjectives Advanced - Identify and define the functions of the parts of speech including, adverbs, adjectives, interjections and conjunctions.	Use unknown root word as a clue to the meaning of an unknown word with the same root (e.g., audience, auditory, audible).	Describe how an author's choices, such as setting, development of characters, and inclusion of details, impact the development of a narrative. Identify the mood and tone of a text and the impact of the mood and tone on understanding the text.	Craft purposeful and artful sentences to connect the complex relationships of complex ideas - write paragraphs that synthesize ideas - write essays that support learning across the curricula	<i>A snowball effect, Like a Lamb to the Slaughter, guru</i>
Oct	Prepositional Phrases Personal Pronouns Advanced - Identify the use of nouns of direct address and appositives. Identify and use concrete and abstract nouns. - Demonstrate understanding of and use predicate nominative and predicate adjective. (aka predicate nouns or subject complements	Continue study of Latin and Greek root words.	Info Text 1. Analyze how the medium and format used to present a nonfiction topic affects and impacts the student's understanding, and integrate these media to develop more coherent understanding. 2. Evaluate and follow an argument to examine the author's development through claims, reasons, and evidence. 3. Examine how two authors treat the same events differently, based on the format or style of the text.	Use prewriting strategies a. Outlining b. Notetaking c. Discussion	<i>She seriously rubbed me the wrong way, Live by the sword, die by the sword</i>
Nov	Indirect Objects Interrogative Pronouns and Interrogative Adverbs Advanced - Identify nouns, with particular emphasis on concrete, abstract, and collective nouns as a part of speech. -		Use imagination to create dialogue between the reader and fictional characters by entering into the lives of the characters and uncovering deeper meanings, inferences, and relationships between the characters, nature,	Write informative/explanatory texts in which they: - Use a topic sentence to introduce a topic and organize information appropriate to the purpose. - develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. - use appropriate transitions and varied sentence structures to join and clarify ideas. - provide a conclusion that follows logically from the information or explanation presented. -use straightforward language to create an objective style appropriate for a reader seeking information. - use MLA style for bibliography.	<i>A stitch in time saves nine, Rob Peter to Pay Paul, ipso facto</i>
Dec	Relative Clauses with Relative Pronouns and Relative Adverbs Appositives Advanced - Use commas correctly b. Use dashes, ellipses, brackets, and parentheses to set off nonrestrictive /parenthetical elements. Apply conventions of punctuation. - Spell correctly	Trace the network of uses and meaning that different words have and the interrelationships among the meanings and uses.	Info Text 1. Acquire and use pivotal vocabulary, both domain-specific and general academic, to best promote clear understanding. 2. Use common grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word.3.Distinguish and demonstrate understanding of: Figurative language, Word relationships and nuances in word meanings.		<i>A storm in a teacup, Scapegoat, mea culpa</i>
Jan	Reflexive Pronouns & Intensive Pronouns Cursive - Produce legible written work applying the standards of correct cursive writing	Distinguish a word from other words with similar denotations but different connotations.	Fiction 1. Identify theme and/or main idea and examine how the author develops each through the use of evidence and details. 2. Summarize a text objectively without commenting or evaluating. 3. Recognize elements of a plot and explain its development, including evolution of characters. 4. Draw inferences and make generalizations based on textual evidence.	Adapt style of writing to purpose - Argumentative - Informative - Narrative - Poetry - Correspondence	<i>An apple a day keeps the doctor away, See Eye to Eye, modus operandi</i>
Feb	Adverbial Causes & Phrases Indefinite Pronouns Advanced - Vary sentence patterns for meaning, reader/listener interest and style.	Verify the preliminary determination of a word's meaning (e.g., by checking the inferred meaning in context or looking up a word in the dictionary).	Identify noble characteristics of persons studied in fiction and nonfiction, and identify the underlying causes of why characters or people do the things they do. b. Identify which characters are worthy of imitation, with rationale grounded in virtue, and which characters are not worthy of imitation.	Write narratives in which they: - engage and orient the reader by establishing a context and point of view, and organize a sequence of events or experiences. - develop narrative elements (e.g., setting, event sequence, characters) using relevant sensory details. - use a variety of transition words, phrases, and clauses to convey sequence, shift from one time frame or setting to another, and/or show the relationships among the events and experiences. - choose words and phrases to develop the events, experiences, and ideas. e. provide a strong conclusion that follows from events, experiences, or ideas.	<i>An ounce of prevention is worth a pound of cure, The Eleventh Hour, persona non grata</i>
March	Participial Phrases		Fiction - 1. Analyze individual components of a text in relationship to theme, setting, plot, and their development. 2. Understand figurative language and unfamiliar vocabulary on the basis of context. 3. Analyze how the medium and format of the presentation of a text affects and impacts thereader's understanding and/or experience of it. 4. Analyze texts in multiple forms that address a common theme or topic, to build knowledge and compare the authors' approaches.	Perform focused research projects that build knowledge through investigation of different aspects of a topic using several sources. - provide basic bibliographic information using MLA format. - Summarize, paraphrase, and quote information c. Avoid plagiarism d. Use in-text citations - Assess credibility of sources	<i>As right as rain, put cards on the table, Que sera, sera</i>
April	Infinitive Phrases Verbal Phrase Review Advanced Demonstrate the use of concrete, abstract, and collective nouns in original compositions	Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.	Analyze the author's reasoning in light of the author's perspective, and identify the author's intent in writing a text. Distinguish between fact, opinion, and propaganda presented in a text. Identify an author's use of symbolism and explain why an author chose to use symbolism at a certain point in the text.	Use correct conventions in writing a. Capitalization b. Punctuation - Spelling - Grammar - Use varied vocabulary appropriate to purpose and expand vocabulary in written pieces	<i>A bird in the hand is worth two in the bush, Don't beat around the bush, pro bono</i>
May	Noun Clauses Advanced - Identify and use relative pronouns, intensive/reflexive pronouns, demonstrative pronouns, possessive pronouns and indefinite pronouns. Identify the antecedent of the pronoun. Demonstrate agreement of antecedent with pronoun.		Fiction - Independently read and comprehend fiction, poetry, and drama on grade level with proficiency. 2. Analyze the impact of a specific word choice on meaning and tone.	With some guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.	<i>A penny for your thoughts, I'm feeling under the weather, prima donna</i>

7th Grade OUTLINE Curriculum Map

7th	Literature	Recitations	History (Ancient)	Ethos 100	Science (Chemistry)	Artist	Composer	Virtues
Aug	Call of the Wild Jack London	Hope is a Thing with Feathers Emily Dickinson	1500 - 1600 Early America - Pre Columbus - From Inca to Mya to American Indian tribes.	Ethos #100 - 23,64, 92	(Optional) Week 1-3 Welcome To Science - Expose scholars to the Basics - Unit 1: The Periodic Table; Elements, Atoms, & Ions Periodic Table Metals Poor metal - semi-metals Non metals	Haydn	Vermeer American Indian Art: Kachina Dolls (Hopi, Zuni); Navajo blankets and rugs, sand paintings, jewelry	Intro to Values & Virtues Excellence -Respect
Sept	Call of the Wild Jack London	Love & Friendship Emily Bronte	1600 - 1618 New Beginnings (Early Settlement in America) - Jamestown - Triangular Slave Trade - Pilgrims	Ethos #100 - 8	Unit 2 Matter, States of Matter Properties of matter Kinetic theory and gases Crystals	Haydn	Vermeer Georgian architecture and Greek Revival	Silence - Order
Oct	The Witch of Blackbird Pond EG Speare	Jabberwocky Lewis Carroll	1618 - 1650 Tragedy & Destruction - Thirty Years' War - Battle, Fire and Plague in England	Ethos #100 - 41, 77, 89	Unit 3 - Solutions molecules and mixtures. Solutions Separating mixtures and compounds Chemical analysis	Haydn	Vermeer	Resolution or Perseverance (Grit) -
Nov	The Witch of Blackbird Pond EG Speare	The Chimney Sweeper William Blake	1650-1775 Unrest French & Indian War AND 1763-1775 Rebellion Events Stamp Act, Boston Massacre, Continental Congress	Ethos #100 - 50	Unit 4 Chemical reactions, Bonding Reactivity Catalysts Oxidation and Reduction	Haydn	Vermeer Genre Paintings: George Caleb's Bingham Fur Traders Descending the Missouri	Humility - Cleanliness
Dec	My Brother Sam Is Dead James Lincoln Collier	In Flanders Fields John McCrae	1763-1775 Rebellion - Stamp Act, Boston Massacre, Boston Tea Party, Paul Revere, Continental Congress	Ethos #100 - 40, 66	Unit 5 Acids and bases Measuring acidity pH Neutralization and salts	Haydn	Vermeer Art of the early United States: famous portraits	Honor - Citizenship
Jan	My Brother Sam Is Dead James Lincoln Collier	Stopping by the Woods on a Snowy Evening Robert Frost	1775-1781 Revolution! - Declaration of Independence, Washington Crossing the Delaware	Ethos #100 - 19, 42, 65	Unit 6 Chemistry of Life - Organic Chem - Chem of the Body	Schubert	Gauguin (Opt) Caspar David Friedrich - Art of the early United States: famous paintings	Truth - Beauty - Goodness
Feb	Scarlet Pimpernel Emma Orczy	Sonnet #29 William Shakespeare	1781- 1789 A New Country - Constitution, First President, Three Branches of Government	Ethos #100 - 25, 26	Chemistry of Food - Fermentation	Schubert	Gauguin (Opt) Caspar David Friedrich - Early American architecture	Justice - Service
March	Scarlet Pimpernel Emma Orczy	A Red, Red Rose Robert Burns	1789- 1815 Another Revolution (French Revolution) The Reign of Terror, Rise and Fall of Napoleon Bonaparte	Ethos #100 - 5, 98	Unit 7 Chemistry of Industry Soaps and detergents Polymers - Adhesives Iron - Steel - Alloys	Schubert	Gauguin (Opt) Caspar David Friedrich	Moderation- Generosity
April	Gulliver's Travels Swift- Signet Classic	Daffodils William Wordsworth	1803 - 1849 Movement (Westward Expansion) Louisiana Purchase War of 1812 - Monroe Doctrine - Gold Rush	Ethos #100 - 4, 79, 80	Coal and Oil Products Chemistry in Farming	Schubert	Gauguin (Opt) Caspar David Friedrich (Opt) Thomas Cole - Hudson River School	Integrity - Loyalty
May	Gulliver's Travels Swift- Signet Classic	Daffodils William Wordsworth	1808 - 1850 Injustice - Slavery/Abolitionists - Missouri Compromise - Trail of Tears - Nat Turner's Revolt	Ethos #100 - 4, 91	Dyes Pigments Cosmetics Fibers and Paper Ceramics and Glass	Schubert	Gauguin (Opt) Caspar David Friedrich (Opt) Thomas Cole	Courage - Trust

7th Grade ENGLISH Curriculum Map

7th	Grammar	Vocabulary	Literary Analysis	Writing	Cultural Sayings
Aug	<p>Diagramming Sentences: Parts of Speech Phrases /Clauses - (Review) Principal Elements of the Sentence</p> <p>Advanced - Explain the function of phrases and clauses in general and their function in specific sentences. - Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas. - Place phrases and clauses within a sentence, avoiding misplaced and dangling modifiers.</p>	<p>Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as using, semantic clues (e.g., definitions, examples, or restatements in text); using syntactic clues (e.g., the word's position of function in a sentence); analyzing the word's sounds, spelling, and meaningful parts; and consulting reference materials, both print and digital.</p>	<p>Info Text 1. Determine the central idea and analyze how the author develops each through the use of evidence. 2. Summarize a text accurately without bias, comment, or evaluation. 3. Analyze how the elements provided in a text (individuals, events, ideas) interact.</p>	<p>Write arguments in which they: - introduce a claim about a topic or issue, acknowledge alternate or opposing claims, and organize the reasons and evidence logically to support the claim. -Research in order to support the claim with logical reasoning and detailed, relevant evidence that demonstrates a comprehensive understanding of the topic. - use words, phrases, and clauses to convey relationships among claims and reasons. - provide a concluding statement or section that follows logically from the argument. e. sustain an objective style and tone.</p>	<p><i>The best of both worlds, Every dog has his day, avatar</i></p>
Sept	<p>Diagramming Sentences: Parts of Speech Phrases /Clauses - (Review) Pronouns Adjectives</p> <p>Advanced - Demonstrate understanding of and use of predicate nominative and predicate adjective (aka predicate nouns and subject complements).</p>	<p>Use known root word as a clue to the meaning of an unknown word with the same root (e.g., belligerent, bellicose, rebel).</p>	<p>Analyze how an author's choices, such as setting, development of characters, and inclusion of details, impact the development of a narrative.</p>	<p>Craft purposeful and artful sentences to connect the complex relationships of complex ideas - write paragraphs that synthesize ideas - write essays that support learning across the curricula</p>	<p><i>Time flies when you're having fun, Familiarity breeds contempt, bon voyage</i></p>
Oct	<p>Diagramming Sentences: Parts of Speech Phrases /Clauses - (Review) Adverbs Prepositional Phrases Transitive Verbs</p> <p>Advanced - Identify nouns with particular emphasis on concrete, abstract, and collective nouns as parts of speech. - Use relative pronouns. - Identify and use intensive / reflexive pronouns and possessive pronouns. Identify the antecedent of the pronoun. Demonstrate agreement of antecedent with pronoun.</p>	<p>Continue study of Latin and Greek root words.</p>	<p>Info Text 1. Draw inferences and make generalizations based on textual evidence. 2. Infer the author's purpose and point of view in a text and analyze the techniques used to establish his or her position from that of others. 3. Analyze the use of a given component (graph, chart, major sections) to develop a specific idea. 4. Understand pivotal vocabulary for the grade level, both domain-specific and general academic, including multiple-meaning words and phrases, on the basis of context.</p>	<p>Use prewriting strategies - Proper outlining technique - Notetaking - Discussion</p>	<p><i>To get bent out of shape, Fit as a fiddle, bona fides</i></p>
Nov	<p>Diagramming Sentences: Parts of Speech Phrases /Clauses (Review) Coordinating Conjunctions</p> <p>Advanced - Identify and use verb phrases. - Identify and use verbals (gerunds, participles, and infinitives).- Use words in the possessive case, the nominative case and the objective case.</p>	<p>Interpret various figures of speech (e.g., allegory) relevant to particular texts.</p>	<p>Use imagination to create dialogue between the reader and fictional characters by entering into the lives of the characters and uncovering deeper meanings, inferences, and relationships between the characters, nature. Examine the degree in which characters significantly possess or lack the perfections proper to a) their nature as human persons, b) their proper role in society as understood in their own culture or the world of the text, c) the terms of contemporary culture.</p>	<p>Write informative/explanatory texts in which they: - Use a topic sentence to introduce a topic and organize information appropriate to the purpose. - develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. - use appropriate transitions and varied sentence structures to join and clarify ideas. - provide a conclusion that follows logically from the information or explanation presented. -use straightforward language to create an objective style appropriate for a reader seeking information. - use MLA style for bibliography.</p>	<p><i>To make matters worse, Fortune favours the bold, carpe diem</i></p>
Dec	<p>Diagramming Sentences: Parts of Speech Phrases /Clauses (Review) Indirect Objects Intransitive Verbs Passive Verbs</p> <p>Advanced - Identify and use direct and indirect objects. I. Use nouns of direct address and appositives. - Identify, use and differentiate between phrases and clauses. - Identify and define the functions of the parts of speech including, adverbs, adjectives, interjections and conjunctions.</p>	<p>Verify the preliminary determination of a word's meaning (e.g., by checking the inferred meaning in context or looking up a word in the dictionary).</p>	<p>Info Text - 1. Acquire and use pivotal vocabulary, both domain-specific and general academic, to best promote clear understanding. 2. Demonstrate understanding of a range of literary nonfiction, at grade level, with proficiency. 3. Cite several pieces of textual evidence to support analysis of what the text says explicitly, as well as inferences, conclusions, and/or generalizations drawn from the text 4. Analyze word choice on meaning and tone 5. Evaluate an argument and specific claims, assessing evidence as relevant and sufficient</p>		<p><i>Under the weather, Get a second wind, caveat emptor</i></p>
Jan	<p>Diagramming Sentences: Commas, Misplaced /Dangling Modifiers (Review) Linking Verbs Noun Jobs Clauses</p> <p>Cursive - Produce legible written work applying the standards of correct cursive writing</p>	<p>Trace the network of uses and meaning that different words have and the interrelationships among the meanings and uses.</p>	<p>Fiction - 1. Determine theme and/or main idea and analyze how the author develops it through the use of evidence and details. 2. Summarize a text objectively without commenting or evaluating. 3. Analyze how and why characters, events, and ideas develop and interact over the course of a text. 4. Draw inferences and make generalizations based on textual evidence</p>	<p>Adapt style of writing to purpose - Argumentative - Informative - Narrative - Poetry - Correspondence</p>	<p><i>We'll cross that bridge when we come to it, Get wind of something, chutzpah</i></p>
Feb	<p>Diagramming Sentences: Commas, Misplaced /Dangling Modifiers (Review) Clauses</p> <p>Advanced - Use comma before a coordinating conjunction in a compound sentence. - Use dashes, ellipses, brackets, and parentheses correctly. - Spell correctly.</p>		<p>Analyze the author's reasoning in light of the author's perspective, identify the author's intent in writing a text, and begin to analyze whether the intent was met in the writing. Identify the stated and unstated premises of an argument and explain how they contribute to the conclusion reached.</p>	<p>Write narratives in which they: - engage and orient the reader by establishing a context and point of view, and organize a sequence of events or experiences. - develop narrative elements (e.g., setting, event sequence, characters) using relevant sensory details. - use a variety of transition words, phrases, and clauses to convey sequence, shift from one time frame or setting to another, and/or show the relationships among the events and experiences. - choose words and phrases to develop the events, experiences, and ideas. - provide a strong conclusion that follows from events, experiences, or ideas.</p>	<p><i>Wrap your head around something, He's not playing with a full deck, cordon bleu</i></p>
March	<p>Precise Language, Word Relationship (Review) Gerunds Participles, Participles and Infinitives</p>	<p>Distinguish a word from other words with similar denotations but different connotations.</p>	<p>Fiction - 1. Analyze textual evidence to support inferences or generalizations. 2. Analyze author's and character's points of view. 3. Analyze individual components of a text in relationship to theme, setting, plot, and their development. 4. Understand figurative language and unfamiliar vocabulary on the basis of context. 5. Analyze how the medium and format of the presentation of a text affects and impacts the reader's understanding and/or experience of it.</p>	<p>Perform focused research projects that build knowledge through investigation of different aspects of a topic using several sources. - provide basic bibliographic information using MLA format. - Summarize, paraphrase, and quote information - Avoid plagiarism d. Use in-text citations - Assess credibility of sources</p>	<p><i>You can say that again, He's off his rocker, de facto</i></p>
April	<p>Precise Language, Word Relationship (Review) Infinitives Review</p> <p>Advanced - Choose words and phrases that express ideas concisely, eliminating wordiness and redundancy.</p>	<p>Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.</p>	<p>Identify the use of symbolism in literature and explain symbolism's role in making visible realities that are complex, invisible, and spiritual. Identify the mood and tone of a text and the impact of the mood and tone on understanding the text</p>	<p>Use correct conventions in writing a. Capitalization b. Punctuation - Spelling - Grammar - Use varied vocabulary appropriate to purpose and expand vocabulary in written pieces</p>	<p><i>Your guess is as good as mine, He's sitting on the fence, déjà vu</i></p>
May	<p>Precise Language, Word Relationship</p> <p>Advanced - Demonstrate the use of concrete, abstract, and collective nouns in original compositions.</p>		<p>Fiction - 1. Analyze texts in multiple forms that address a common theme or topic, to build knowledge and compare the authors' approaches. 2. Acquire both general and domain-specific academic, grade-appropriate vocabulary and apply it in comprehension of a variety of texts. 3. Independently read and comprehend fiction, poetry, and drama on grade level with proficiency. 4. Analyze how a drama's or poem's form or structure contributes to its meaning. 5. Compare and contrast fictional portrayal of a time, place, or character and an historical account of the same period as a means of understanding how authors of fiction use or alter history</p>	<p>With some guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.</p>	<p><i>Give someone the benefit of the doubt, It is a poor workman who blames his tools, doppelgänger</i></p>

8th Grade OUTLINE Curriculum Map

8th	Classic Lit	Recitations	History (Modern)	Ethos 100	Science (Physics)	Artist	Composer	Virtues
Aug	Huckleberry Finn Mark Twain	The Road Not Taken Robert Frost	1825-1861 HEADING TOWARDS WAR - Expansion Underground Railroad, Comp 1850, Dred Scott Lincoln/Douglas Debates	Ethos #100 - 27, 84	(Optional) Week 1-3 Welcome To Science - Expose scholars to the Basics Unit 1 Motion Forces Friction Motion Speed and Acceleration	Verdi - Schumann (Opt) Blues - Bluegrass - Folk	Renoir	Intro to Values & Virtues Excellence -Respect
Sept	Huckleberry Finn Mark Twain	Gettysburg Address Abraham Lincoln	1861-1865 THE CIVIL WAR	Ethos #100 - 44	Unit 2 Energy , Energy and Work Energy Sources Pressure - Simple machines	Verdi - Schumann (Opt) Blues - Bluegrass - Folk	Renoir Intro to photography; Civil War-era art	Silence - Order
Oct	Red Badge of Courage Stephen Crane	Robert E. Lee's Farewell Address	1865-1914 Post War MOVEMENT Transportation, Immigration, Westward Expansion, Gilded Age Progressivism	Ethos #100 - 15, 60, 68, 81, 82, 88	Unit 3 - Thermodynamics , Energy Conversion Heat Thermodynamics Engines	Verdi - Schumann (Opt) Musical Traditions: American Songs: "Battle Hymn of the Republic"; "God Bless America"; "Star Spangled Banner"; "Sheandoah"	Renoir	Resolution or Perseverance (Grit) -
Nov	All Quiet on the Western Front Erich Remarque	If R. Kipling	1914-1929 EXCESS and ABUNDANCE - 2nd Industrial Revolution, World War I The Roaring 20's, Prohibition, Jazz, Entertainment, Immigration Restrictions Stock Market Crash	Ethos #100 - 34, 59, 29, 67, 69	Unit 4 Sound Sound Sound waves Hearing Sounds Acoustics	Verdi Schumann (Opt) Blues and Big Band	Renoir Popular art in 19th century America : prints by Currier & Ives	Humility - Cleanliness
Dec	All Quiet on the Western Front Erich Remarque	In the Arena Teddy Roosevelt	1929-1941 THE BUST The Great Depression, Roosevelt's New Deal	Ethos #100 - 27, 67, 69	Unit 5 Light Reflections and Refractions Vision and Color Optics	Verdi - Schumann (Opt) Swing Era and Showtunes	Renoir (Opt) Painting since WWII	Honor - Citizenship
Jan	To Kill A Mockingbird Harper Lee	America the Beautiful K. Bates	1930-1945 NATIONALISM Rise of Dictators World War II Beginning WWII	Ethos #100 - 14, 61, 95, 10, 33	Unit 6 Electricity - Electric current Conductors and Insulators Batteries Circuits	Richard Wagner (Opt) Radio, Leonard Bernstein	Picasso Norman Rockwell (Opt) Painting since WWII	Truth - Beauty - Goodness
Feb	To Kill A Mockingbird Harper Lee Start Night Elie Wiesel	Never Shall I Forget from Night by Elie Wiesel	1941-1945 WORLD WAR II America enters - Pacific theater Hiroshima Marshall Plan	Ethos #100 - 12, 35, 36, 96, 56, 62, 73	Unit 6 Electricity - Magnetism, Electromagnetism Motors and Generators	Richard Wagner (Opt) Jazz	Picasso Photography	Justice - Service
March	Night Elie Wiesel (1960)	Mother to Son Langston Hughes	1945-1961 COLD WAR - Baby Boom, Suburbs, Automobiles, Korean War Civil Rights Movement The Cold War, Eisenhower	Ethos #100 - 9, 17, 32, 72, 83, 94	Unit 7 Engineering and Bridges Tunnels Robotics	Richard Wagner (Opt) Pop - Mowtown - Elvis	Picasso Photography	Moderation- Generosity
April	1984 George Orwell	I Have A Dream by M.L.King Jr. (1963) Start mid: "I say to you today my friends"	1961-1973 TURBULENT 1960'S Kennedy, Space Race, Vietnam, Woodstock, Civil Rights	Ethos #100 - 45, 14, 46, 85	Unit 7 Engineering -Robotics Actuators and effectors Sensors and controllers	Richard Wagner (Opt) Marvin Gaye, Beatles, Rolling Stones, Beach Boys, Jimmy Hendrix, Folk Rock, Protest Music	Picasso 20th Century Sculpture -	Integrity - Loyalty
May	1984 George Orwell	I Have A Dream by M.L.King Jr. (1963) Start mid: "I say to you today my friends"	1973 -To 9/11 AGE of TERRORISM - 1970's, Watergate, Terrorism, Iran Hostage, Reagan, 9/11	Ethos #100 - 20, 21, 71, 87, 13, 31, 47, 86, 97, 22, 99	Unit 8 Nuclear Physics Radioactivity Nuclear Energy	Richard Wagner (Opt) 1970s Top 40 - Pop	Picasso - Salvador Dali Architecture Industrial Revolution -	Courage - Trust

8th Grade ENGLISH Curriculum Map

8th	Grammar	Vocabulary (Skills)	Literary Analysis	Writing	Cultural Sayings
Aug	<p>Basic Sentence Parts (Review) Simple Sentences Verb Mood (indicative, imperative, interrogative)</p> <p>Advanced - Demonstrate the use of concrete, abstract, and collective nouns in original compositions.</p>	<p>Determine or clarify the meaning of unknown or multiple-meaning words through the use of one or more strategies, such as understanding how the word is used in a sentence; analyzing the word's sounds, spelling, and meaningful parts; and consulting glossaries or beginning dictionaries, both print and digital.</p>	<p>Info Text 1. Cite textual evidence that most strongly supports an analysis of what the text says explicitly and inferentially. 2. Determine a central idea of a text and analyze how it is developed, including its relationship to supporting ideas; provide an objective summary. 3. Analyze how a text makes connections among and distinctions between individuals, ideas, or events through comparisons, analogies, and categories.</p>	<p>Write arguments in which they: - introduce a claim about a topic or issue, acknowledge alternate or opposing claims, and organize the reasons and evidence logically to support the claim. -Research in order to support the claim with logical reasoning and detailed, relevant evidence that demonstrates a comprehensive understating of the topic. - use words, phrases, and clauses to convey relationships among claims and reasons. - provide a concluding statement or section that follows logically from the argument. e. sustain an objective style and tone.</p>	<p><i>A grey area, Burn bridges, There Is Nothing New under the Sun, quid pro quo</i></p>
Sept	<p>Basic Sentence Parts (Review) Simple Sentences Verb Mood (indicative, imperative, interrogative)</p> <p>Advanced - Use and differentiate between clauses and phrases. - Identify and use verbal's (gerunds, participles, and infinitives). - Recognize and correct inappropriate shifts in verb voice and mood.</p>	<p>Use a known word as a clue to meaning of an unknown word with the same root (precede, recede, secede).</p>	<p>Identify the importance of the setting of a piece of literature. Summarize how literature can reflect the historical and sociological culture of the time period in which it was written and help better understand ourselves and other cultures and times.</p>	<p>Craft purposeful and artful sentences to connect the complex relationships of complex ideas - write paragraphs that synthesize ideas - write essays that support learning across the curricula</p>	<p><i>A rip-off, Calm before the storm, Thorn in your side, status quo</i></p>
Oct	<p>Direct and Indirect Objects, Predicate Nouns and Predicate Adjectives, Simple Sentences, Compound Sentences, Verb Mood (cont.)</p> <p>Advanced - Use nouns, with particular emphasis on concrete, abstract, and collective nouns as a part of speech.</p>		<p>Info Text 1. Determine the meaning of words and phrases as they are used, including figures of speech, connotations, and technical meanings. Analyze the impact of diction on tone, analogies to other texts, and allusions. 2. Analyze in detail the structure of a specific paragraph in a text, including the role of particular sentences in developing and refining the</p>	<p>Use prewriting strategies - Proper outlining technique - Notetaking - Discussion</p>	<p><i>Add fuel to the fire, Come rain or shine, Throw the First Stone, tete-a-tete</i></p>
Nov	<p>Appositives, Adjective and Adverb Prepositional Phrases, Simple Sentences, Compound Sentences, Comma use, Verb Mood (cont.)</p> <p>Advanced - Demonstrate understanding of and use predicate nominative and predicate adjective.</p>	<p>Verify the preliminary determination of a word's meaning (e.g., by checking the inferred meaning in context or looking up a word in the dictionary).</p>	<p>Use imagination to create dialogue between the reader and fictional characters by entering into the lives of the characters and uncovering deeper meanings, inferences, and relationships between the characters, nature. Analyze characters in a text, with a sense of the "good" by examining the degree in which characters significantly possess or lack the perfections proper to a) their nature as human persons, b) their proper role in society as understood in their own culture or the world of the text, c) the terms of contemporary culture</p>	<p>Write informative/explanatory texts in which they: - Use a topic sentence to introduce a topic and organize information appropriate to the purpose. - develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. - use appropriate transitions and varied sentence structures to join and clarify ideas. - provide a conclusion that follows logically from the information or explanation presented. -use straightforward language to create an objective style appropriate for a reader seeking information. - use MLA style for bibliography.</p>	<p><i>As easy as ABC, Curiosity killed the cat, To Be On The Straight And Narrow, vendetta</i></p>
Dec	<p>Compound Sentences, Complex Sentences,, Comma use in complex sentences, Verb Mood (cont.)</p> <p>Advanced - Form and use verbs in the active and passive voice. - Form and use verbs in the indicative, imperative, interrogative, conditional, and subjunctive moods. - Use verb phrases.</p>	<p>Trace the network of uses and meaning that different words have and the interrelationships among the meanings and uses.</p>	<p>Info Text 1. Determine an author's point of view or purpose, and analyze how the author responds to conflicting viewpoints. 2. Evaluate the advantages and disadvantages of using different mediums to represent a topic or idea. 3. Detail and evaluate the arguments and claims of a text, assessing their validity, and recognizing irrelevant evidence. 4. Analyze two or more texts provide conflicting information on the same topic and identify where the texts disagree on facts or interpretations .</p>		<p><i>Call it a day, Cut the mustard, To Cast Pearls before Swine, veni, vidi, vici</i></p>
Jan	<p>Verbals, Spelling of Tricky Words</p> <p>Advanced - Use relative pronouns. Use intensive/reflexive pronouns, demonstrative pronouns, possessive pronouns and indefinite pronouns. j. Demonstrate agreement of antecedent with pronoun.</p>	<p>Distinguish a word from other words with similar denotations but different connotations</p>	<p>Fiction 1. Determine theme and/or main idea and analyze what evidence and details most strongly support this analysis. 2. Determine a central idea or theme of a text, analyze its development, including development of characters, setting, and plot, and provide an objective summary.</p>	<p>Adapt style of writing to purpose - Argumentative - Informative - Narrative - Poetry - Correspondence</p>	<p><i>Cool as a cucumber, Don't beat a dead horse, Weighed in the Balance, Vice versa</i></p>
Feb	<p>Verbals, Active/Passive Voice</p> <p>Advanced - Use nouns of direct address and appositives. m. Identify and define the functions of the parts of speech including, adverbs, adjectives, interjections and conjunctions.</p>		<p>Analyze the author's reasoning in light of the author's perspective, identify the author's intent in writing a text, and analyze whether the intent was met in the writing. Evaluate an argument's claim and reasoning as well as the degree to which evidence supports each claim.</p>	<p>Write narratives in which they: - engage and orient the reader by establishing a context and point of view, and organize a sequence of events or experiences. - develop narrative elements (e.g., setting, event sequence, characters) using relevant sensory details. - use a variety of transition words, phrases, and clauses to convey sequence, shift from one time frame or setting to another, and/or show the relationships among the events and experiences. d. choose words and phrases to develop the events, experiences, and ideas. e. provide a strong conclusion that follows from events, experiences, or ideas.</p>	<p><i>Crack a book, Haste makes waste, What God has joined together let no man put asunder, Wit's End</i></p>
March	<p>Verb Moods (Review indicative, impera-tive, interrogative; add conditional and subjunctive)</p> <p>Advanced - Use verbs in active and passive voice and in the conditional and subjunctive moods to achieve particular effects (e.g., emphasizing the actor or the action; expressing uncertainty or describing a state contrary to fact.)</p>		<p>Fiction 1. Analyze how particular lines of dialogue or incidents in a story or drama propel the action, reveal aspects of a character, or provoke a decision. 2. Determine the meaning of figurative words and phrases and connotations, and analyze the impact on tone, including allusions and analogies. 3. Compare and contrast the structure of two or more texts and analyze how the differing structures influence meaning and style.</p>	<p>Perform focused research projects that build knowledge through investigation of different aspects of a topic using several sources. - provide basic bibliographic information using MLA format. - Summarize, paraphrase, and quote information c. Avoid plagiarism d. Use in-text citations - Assess credibility of sources</p>	<p><i>Down to the wire, Have your head in the clouds, Wolves in Sheep's Clothing</i></p>
April	<p>Advanced - Use words in the possessive case, the nominative case and the objective case.</p> <p>Advanced - Use commas to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old (,) green shirt). b. Use commas, ellipses, or a dash to indicate a pause or break. c. Spell correctly.</p>	<p>Use grade appropriate general academic vocabulary and domain specific words and phrases taught directly and acquired through reading and responding to text.</p>	<p>Identify the use of classic Judeo/Christian and Western symbols in a piece of literature, and explain their importance in understanding their role in making visible realities that are complex, invisible, and spiritual.</p>	<p>Use correct conventions in writing a. Capitalization b. Punctuation - Spelling - Grammar - Use varied vocabulary appropriate to purpose and expand vocabulary in written pieces</p>	<p><i>Draw a blank, He who laughs last laughs loudest, zeitgeist</i></p>
May	<p>Grammar Review and Pre-view</p>		<p>Fiction 1. Analyze how different points of view can create suspense or humor. 2 . Analyze the extent to which a film or live production of a story or drama stays faithful to or departs from an original text or script, evaluating the changes made. 3. Analyze how a modern work of fiction draws on themes, patterns of events, or character types from myths, traditional stories, or religious works and reworks them into something new. 4. Read and comprehend dramas, stories, poetry at the high end of the complexity band by the end of the year.</p>	<p>With some guidance and support from peers and adults, strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.</p>	<p><i>Fill in the blanks, Hear something straight from the horse's mouth, fait accompli</i></p>

2025-26 School Calendar

Month	Su	Mo	Tu	We	Th	Fr	Sa	Instr Days	Total Days	Federal holidays / notes
Aug			1	2	3	4	5			1-8 - Teacher In Service – Staff Development
	6	7	8	9	10	11	12			9 – First Day of School
	13	14	15	16	17	18	19			16 – Early Release – Staff Development
	20	21	22	23	24	25	26	15days		23 – Early Release - Staff Development
Sep	27	28	29	30	31	1	2			30 – Teacher In Service – Staff Development
	3	4	5	6	7	8	9			4 -Labor Day – No School – 8 Early Release – Staff Development
	10	11	12	13	14	15	16			13 – Early Release – Staff Development
	17	18	19	20	21	22	23			20 – Early Release – Staff Development
Oct	24	25	26	27	28	29	30	21 days		27 – Early Release – Staff Development
	1	2	3	4	5	6	7			4 – Early Release – Staff Development
	8	9	10	11	12	13	14			11 – Early Release – Staff Development
	15	16	17	18	19	20	21			18 – Early Release – Staff Development
Nov	22	23	24	25	26	27	28	21 days		25 – Early Release – Staff Development
	29	30	31	1	2	3	4			1 – Early Release – Staff Development
	5	6	7	8	9	10	11			8– Early Release – Staff Development
	12	13	14	15	16	17	18			15 – Early Release – Staff Development
Dec	19	20	21	22	23	24	25	17 days		22-26 -Thanksgiving Break – No School
	26	27	28	29	30	1	2			29 – Early Release – Staff Development
	3	4	5	6	7	8	9			6 – Early Release – Staff Development
	10	11	12	13	14	15	16			13– Early Release – Staff Development
Jan	17	18	19	20	21	22	23			20– 30 -Christmas Break – No School
	24	25	26	27	28	29	30	13 days	87	
	31	1	2	3	4	5	6			3 – Start of Second Semester - 5 – Early Release – Staff Development
	7	8	9	10	11	12	13			10 – Early Release – Staff Development
Feb	14	15	16	17	18	19	20			15 - MLK Day – No School 19 – Early Release – Staff Development
	21	22	23	24	25	26	27	20 days		24 – Early Release – Staff Development
	28	29	30	31	1	2	3			31 – Early Release – Staff Development
	4	5	6	7	8	9	10			7 – Early Release – Staff Development
Mar	11	12	13	14	15	16	17			14 – Early Release – Staff Development
	18	19	20	21	22	23	24	20 days		21 – Early Release – Staff Development
	25	26	27	28	29	30	31			28 – Early Release – Staff Development
	4	5	6	7	8	9	10			7-10 – Spring Break – No School
Apr	11	12	13	14	15	16	17			14 – Early Release – Staff Development
	18	19	20	21	22	23	24	18 days		21 – Early Release – Staff Development
	25	26	27	28	29	30	31			28 – Early Release – Staff Development
	1	2	3	4	5	6	7			4 – Early Release – Staff Development
May	8	9	10	11	12	13	14			13 –Friday – No School 13 – Early Release – Staff Development
	15	16	17	18	19	20	21			18 – Early Release – Staff Development
	22	23	24	25	26	27	28	20 days	164	25 – Early Release – Staff Development
	29	30	1	2	3	4	5			2 – Early Release – Staff Development
Jun	6	7	8	9	10	11	12			9 – Early Release – Staff Development
	13	14	15	16	17	18	19			16 – Early Release – Staff Development
	20	21	22	23	24	25	26	19 days	185	25 – End of School – Early Release - 185 Days of Instruction
	27	28	29	30	31	1	2			
Jul	3	4	5	6	7	8	9			36 early release days – 345 min of instruction (1 st to 5 th) 330 min of instruction (6 th to 8 th)
	10	11	12	13	14	15	16			147 full days – 430 min of instruction (1 st to 5 th) 440 min of instruction (6 th to 8 th)
	17	18	19	20	21	22	23			Total K5 hours/year = 1,260 Total 6-8 th hours/year = 1,276
	25	26	27	28	29	30	1			
Aug	2	3	4	5	6	7	8			Grading Periods –
	9	10	11	12	13	14	15			Aug 12 to Oct 22 - Oct 25 to Dec 15
	16	17	18	19	20	21	22			Jan 3 to March 25 - March 28 to May 26
	23	24	25	26	27	28	29			NC End of Year(Tentative) April 5-8 and May 3-13 (Closed Campus)
Sep	30	31	1	2	3	4	5			

1st to 8th Grade (Full)

CLASS SCHEDULE: 8:00 – 3:00 pm
Full Day Schedule (M, T, Th, F)

Activity	Time of Instruction
Attendance, Pledge & Recitation	10 minutes
Language Arts Block	80 minutes
Math	90 minutes
Recess & Snack	20 minutes
Latin – Language Block	30 minutes
Science	45 minutes
Lunch	35 minutes
History Classical Block w/Science, Art & Music	55 minutes
Specials Rotation (P.E., Art or Music)	45 minutes
ELA Independent Reading	35 minutes
ELA Read Aloud	20 minutes

Minutes of Instruction – 400 full day minutes
149 full days of instruction = 59,600 minutes

993 hours

1st to 8th Grade (Half)

7:45am –
WEDNESDAY SCHEDULE: 1:30pm
Early Release - (Wednesdays)

Activity	Time of Instruction
Attendance, Pledge & Recitation	10 minutes
Language Arts Block	80 minutes
Math	60 minutes
Recess & Snack	20 minutes
Math/ELA Extension	35 minutes
Science	30 minutes
Lunch	30 minutes
Read Aloud	15 minutes
History Classical Block	35 minutes
Specials Rotation (P.E., Art & Music)	30 minutes

345 minutes of instruction
36 Early Release Days per year = minutes
12,420 or **207 hours**

Total Days: 185 Total hours: 1,200

NOTE: Latin is 4x per week on M, T, Th. & Fri. Teachers may use the 35 minutes in Wednesday’s schedule for extra emphasis in Math or Language Arts.

6th to 8th Grade Class Schedules

CLASS SCHEDULE: 7:50am – 3:00pm
 Full Day Schedule (M, T, Th,F)

Activity	Time of Instruction
Attendance, Pledge & Recitation	10 minutes
Period 1	55 minutes
Period 2	55 minutes
Period 3	55 minutes
Period 4	55 minutes
Lunch	55 minutes
Period 5	55 minutes
Period 6	55 minutes
Period 7	55 minutes

Minutes of Instruction – 440 full day
 147 full days of instruction = 64,680

6th to 8th Grade Class Schedules

7:45 am – 1:15 pm
 WEDNESDAY SCHEDULE: pm
 Early Release - (Wednesdays)

Activity	Time of Instruction
Attendance, Pledge & Recitation (SEL, Culture Building, Student Gov)	30 minutes
Period 1	45 minutes
Period 2	45 minutes
Period 3	45 minutes
Period 4	45 minutes
Lunch	45 minutes
Period 5	45 minutes
Period 6	45 minutes
Period 7	45 minutes

Minutes of Instruction - 330 early release
 36 Early Release Days per year = 11,880

Total Minutes of Instruction = 76,560

Trinitas Academy will implement the LoTi Teacher Evaluation System, (Levels of Teaching Innovation), teacher evaluation and student engagement system. Through pop in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allow the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable and allows the Titus Academy admin to identify issues and put in corrective actions. The target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

NAME:

SCHOOL:

EVALUATOR:

DATE/TIME:

TENURE STATUS:

- Tenured
 Non-Tenured

PRE-OBSERVATION CONFERENCE NOTES:

DATE OF POST-OBSERVATION CONFERENCE:

CO-OBSERVATION:

Is this a Co-Observation?

- Yes; This is a Co-Observation and I am the primary observer
 Yes; This is a Co-Observation and I am the secondary observer
 No; This is not a Co-Observation

Report Co-Observation?

- Yes; Formally report observation data
 No; This is an observation for training purposes only

Name of Co-Observation Partner:

TYPE OF OBSERVATION:
Announced or Unannounced?

- This is an Announced Observation
 This is an Unannounced Observation

Long or Short?

- This is a Long Observation
 This is a Short Observation

LESSON OBJECTIVE:

Note the Objective of the Lesson:

Following is the:

- Teacher facing forms which explains what is expected towards mastery and what will be measured.
- The coach/admin facing forms for tracking observations.
- The Rubric which is used for training and then observing of instruction.
- A sample scatter plot report generated from multiple observations.
- The Teacher self reflection forms
- The coach/admin report to the teacher post observation

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PLANNING & PREPARATION

Score: _____ Rating: _____

INSTRUCTION

Score: _____ Rating: _____

CLASSROOM ENVIRONMENT

Score: _____ Rating: _____

PROFESSIONAL RESPONSIBILITIES

Score: _____ Rating: _____

OVERALL SCORE/RATING

COMMENTS



DOMAIN 1: PLANNING & PREPARATION

<i>Failing (1)</i>	<i>Needs Improvement (2)</i>	<i>Proficient (3)</i>	<i>Distinguished (4)</i>
1-A: Demonstrating Knowledge of Content & Pedagogy			
Teacher makes no attempt to connect new content with scholar knowledge base or theme-based enduring understandings within the wider classical knowledge base	Teacher makes limited attempts to connect new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base	Teacher connects new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base	Teacher connects new content with scholar knowledge base, anticipates misconceptions, and makes interdisciplinary connections within the wider classical knowledge base
1-B: Demonstrating Knowledge of Scholars			
Teacher does not use formative assessments or differentiation strategies to guide scholar discovery	Teacher guides scholar discovery with limited formative assessments or differentiation strategies, but they do not reflect an understanding of the readiness or interests of scholars	Teacher guides scholar discovery with formative assessments and/or differentiation strategies that reflect a general understanding of the readiness and/or interests of most scholars	Teacher guides scholar discovery with formative assessments and differentiation strategies that reflect a comprehensive understanding of the readiness and interests of all scholars
1-C: Setting Instructional Outcomes			
Teacher does not provide learning objectives, thematic resources, or activities that reflect scholar readiness	Teacher provides limited learning objectives, thematic resources, or activities that reflect the readiness of some scholars	Teacher provides learning objectives, thematic resources, and/or activities/outcomes paced to reflect the readiness of most scholars	Teacher provides clear learning objectives, age-appropriate thematic resources, and rigorous activities/outcomes paced to reflect the readiness of all scholars
1-D: Demonstrating Knowledge of Resources			
Teacher does not provide resources that support the theme or cultivate <i>Habits of the Heart and Mind</i>	Teacher provides limited resources from the wider classical knowledge base that support the theme, promote critical thinking, or cultivate <i>Habits of the Heart and Mind</i>	Teacher provides resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and/or <i>Habits of the Heart and Mind</i>	Teacher provides extensive resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and cultivate <i>Habits of the Heart and Mind</i>
1-E: Designing Coherent Instruction			
Teacher does not design learning activities/outcomes for scholars to make connections with themes, timelines, or enduring understandings of a Classical Education model	Teacher designs learning activities/outcomes that support some scholars in making limited connections with themes, timelines, or enduring understandings of a Classical Education model	Teacher designs learning activities/outcomes that engage most scholars in making purposeful connections with themes, timelines, and/or enduring understandings of a Classical Education model	Teacher designs differentiated learning activities/outcomes that engage all scholars in making their own purposeful connections with themes, timelines, and enduring understandings of a Classical Education model
1-F: Designing Scholar Assessments			
Teacher does not design assessments that guide new learning or provide feedback for scholars	Teacher designs assessments that guide the pace of new learning and/or provide limited feedback for scholars	Teacher designs assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and/or provide feedback for scholars to assess their own goals	Teacher designs authentic assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and provide feedback for scholars to assess their own goals and outcomes



A comprehensive report is generated on each teacher in the school. This details the domain areas of strength and weakness as well as a graphical analysis of areas of success in the classroom.

NAME: Jane Doe - janedoe@sample.com

OBSERVER: John Doe - johndoe@sample.com

WALKTHROUGH DATE: 01/01/2019 12:39 PM EST

PRE-OBSERVATION CONFERENCE NOTES:

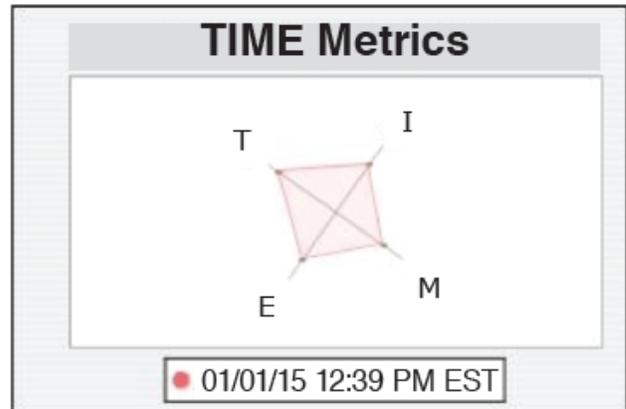
Students were solving a mystery surrounding the play, Macbeth.

DATE OF POST-OBSERVATION CONFERENCE:
01/05/2019

LESSON SUMMARY:

Briefly summarize the lesson observed. What is the discipline/content area? What is the coaching focus? What is the lesson objective?

SWBAT to write a letter offering advice to the next king based on their analysis of the play, Macbeth, and create a movie trailer to entice their peers about the play.



Ethos Logos Performance Level

4.25
Excellence

Classical Learning Level

2.95
Strong

FIRST IMPRESSIONS UPON ENTERING CLASSROOM

WHAT IS THE TEACHER DOING?

- ✓ Standing and delivering content
- Modeling a process/concept
- Facilitating small group instruction
- Conducting a whole group review
- Personalizing a learning episode

Comments:

WHAT ARE THE SCHOLARS DOING?

- ✓ Watching the teacher and/or taking notes
- ✓ Responding orally to teacher-directed questions
- Asking questions and/or seeking clarification
- Conducting a turn-and-talk with other scholar(s)
- Working independently on project/assignment
- Participating in a Socratic seminar

Comments:



WHAT IS THE FEELING/TONE OF THE CLASSROOM?

- ✓ Positive scholar to scholar interactions
- ✓ Positive scholar to teacher interactions
- Productive learning habits are the norm
- ✓ Classroom conducive to learning

Comments:

DOES THE ROOM REFLECT LEMAN CLASSICAL STANDARDS?

- ✓ Timeline
- ✓ Orderly
- Clean
- Professional
- ✓ Caring
- ✓ Citizenship
- Perseverance
- ✓ Respect
- Responsibility
- Trustworthiness

Comments:

IS INSTRUCTIONAL TIME FOCUSED ON THE TASK

- ✓ Yes
- No

Comments:

TEACHER ACTIONS

MANAGEMENT OF CLASSROOM:

- Routines are not defined, lack of respect by scholars to teacher & each other
- Some scholars following expectations, routines are being established
- Most scholars are following expectations, routines are established
- ✓ Commands respect, routines are norms and followed by all
- Tenacious in getting scholars to be self-disciplined, masters really discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

INSTRUCTIONAL PLANNING & DELIVERY:

- Not planned, no observable objectives
- Some planning is evident, objectives are evident but not clear or articulated
- ✓ Well-planned lesson, clear objectives, mixture of good and learning adequate materials
- Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

SCHOLAR ACTIONS

THINKING:

- Scholars are not observed to be thinking or engaged in the learning
- Scholars display knowledge and/or understanding of topic
- ✓ Scholars apply the learning to new and different situations
- Scholars analyze interrelationships, ideas, and themes
- Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

Comments:



ENGAGED LEARNING:

- < 70%
- 71% - 80%
- ✓ 81% - 90%
- 90% - 95%
- 96% - 100%

Comments:

CLASSICAL LEARNING**HUMOR AND FUN:**

- Very little fun and humor observed in classroom
- Humor and fun were observed and contributed to learning environment
- ✓ Fun and humor were consistently used that created a positive learning environment

Comments:

INTEGRATION/CONNECTION TO DISCIPLINES:

- ✓ Only observed subject being taught; no integration with other disciplines
- Integration and connections were attempted involving other disciplines
- Natural connections and integration across subjects were made

Comments:

VIRTUES AND VALUES:

- No virtues or values were mentioned
- ✓ Virtues and values were highlighted but not deeply integrated
- Full integration of virtues and value

Comments:

THE BIG WHY? (PURPOSE/LIFE):

- No purpose was shared
- The Big Why of the topic was mentioned
- ✓ The Big Why and deeper purpose was consistently discussed

Comments:

CHARLOTTE MASON INFLUENCE:

- No influence was observed of C. Mason
- ✓ A few of C. Mason influences were observed and noted
- The teacher implemented numerous C. Mason strategies

Comments:

TEACHER TALK VS. SCHOLAR TALK:

- Teacher talked most of the time
- ✓ There was a balance between teacher talk and scholar talk
- Teacher talked less than the scholars

Comments:



TEACHER ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Management of Classroom

- Routines are not defined, lack of respect by scholars to teacher & each other
- Some scholars following expectations, routines are being established
- Most scholars are following expectations, routines are established
- Commands respect, routines are norms and followed by all
- Tenacious in getting scholars to be self-disciplined, masters reality discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

Instructional Planning & Delivery

- Not planned, no observable objectives
- Some planning is evident, objectives are evident but not clear or articulated
- Well-planned lesson, clear objectives, good variety of learning materials
- Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

SCHOLAR ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Thinking

- Scholars are not observed to be thinking or engaged in the learning
- Scholars display knowledge and/or understanding of topic
- Scholars apply the learning to new and different situations
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Comments:

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CLASSICAL LEARNING: *Check the HIGHEST LEVEL practice observed only*

Humor and Fun

- Very little fun and humor observed in classroom
- Humor and fun were observed and contributed to learning environment
- Fun and humor were consistently used that created a positive learning environment

Comments:

The Big Why? (Purpose/Life)

- No purpose was shared
- The Big Why of the topic was mentioned
- The Big Why and deeper purpose was consistently discussed

Comments:

Integration/Connection to Disciplines

- Only observed subject being taught; no integration with other disciplines
- Integration and connections were attempted involving other disciplines
- Natural connections and integration across subjects were made

Comments:

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- Teacher talked less than the scholars

Comments:



This form is completed during the observation by the PD/Data/Curriculum Director and or the site Administrators. The Coach then compares the teacher self evaluation and has a starting point for the teacher's professional development plan. These observations happen multiple times per year, both as pops ins and as formal reviews. All the coach data is aggregated and compiled so the administration can observe individual and campus wide trends.

OBSERVATION INFO

Teacher Information

Observer Name:

Date:

Time:

School Name:

Teacher Observed:

Pre-Observation Conference Notes:

Date of Post-Observation Conference:

Lesson Summary

Briefly summarize the lesson observed. What is the discipline/ content area? What is the coaching focus? What is the lesson objective?

FIRST IMPRESSIONS UPON ENTERING CLASSROOM: *Check ANY practice observed*

What is the teacher doing?

- Standing and delivering content
- Modeling a process/concept
- Facilitating small group instruction
- Conducting a whole group review
- Personalizing a learning episode

Comments:

What are the scholars doing?

- Watching the teacher and/or taking notes
- Responding orally to teacher-directed questions
- Asking questions and/or seeking clarification
- Conducting a turn-and-talk with other scholar(s)
- Working independently on project/assignment
- Participating in a Socratic seminar

Comments:

Is instructional time focused on the task?

- Yes
- No

Comments:

What is the feeling/tone of the classroom?

- Positive scholar to scholar interactions
- Positive scholar to teacher interactions
- Productive learning habits are the norm
- Classroom conducive to learning

Comments:

Does the room reflect Leman Classical Standards?

- Timeline
- Orderly
- Clean
- Professional
- Caring
- Citizenship
- Perseverance
- Respect
- Responsibility
- Trustworthiness

Comments:



TEACHER ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Management of Classroom

- Routines are not defined, lack of respect by scholars to teacher & each other
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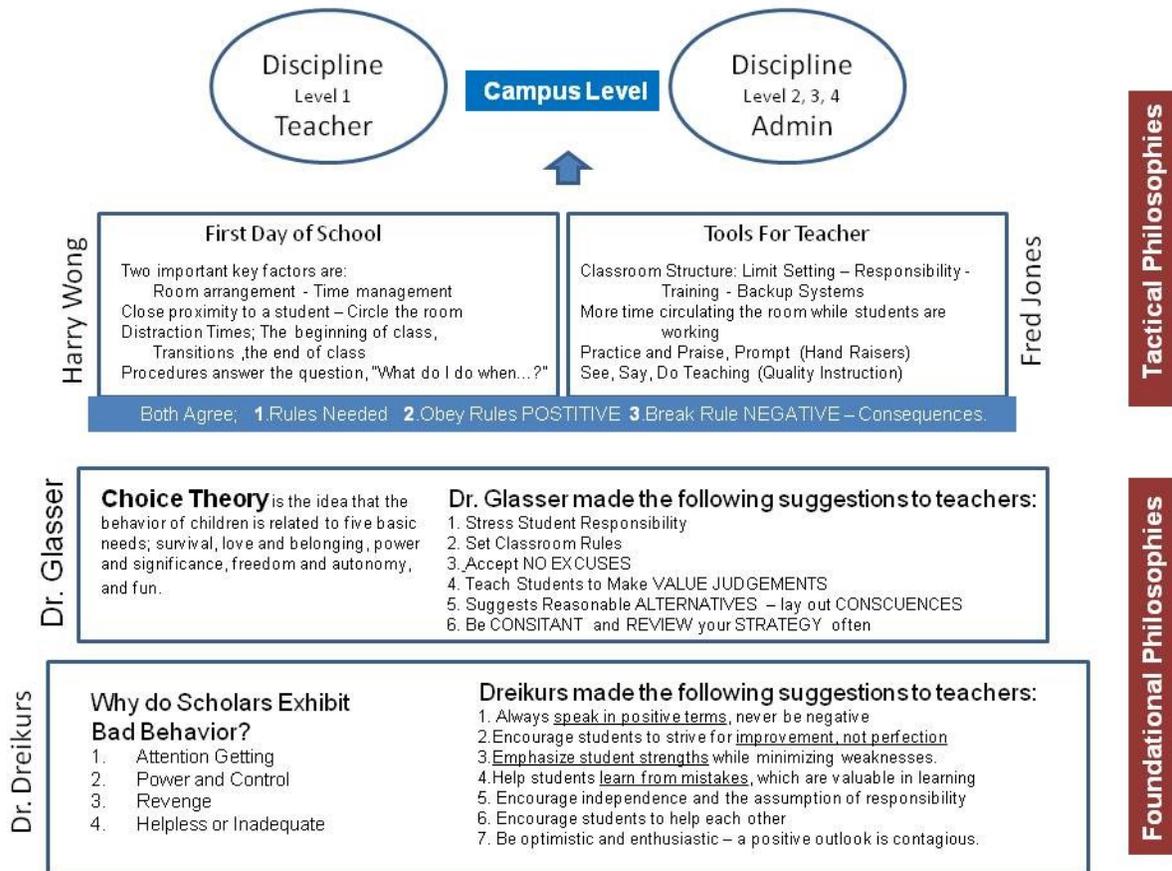


Framework for Trinitas Academy Discipline Policy

The foundations of the Trinitas Academy discipline policy are based on research by Dr. Rudolf Dreikurs an Adlerian psychologist whose life work who suggested that human misbehavior is the result of feeling a lack of belonging to one's social group. When this happens the child acts from one of four "mistaken goals": undue attention, power, revenge or avoidance (inadequacy). Dreikurs' overall goal was that students would learn to cooperate reasonably without being penalized or rewarded because they would feel that they are valuable contributors to the classroom. This simple theory is the basis for student success and the root of discipline issues in a school. The power of relationships between the teacher and the scholar is the foundation of academic and life success of the scholar. To simplify the theory the Teddy Roosevelt quote; *'People won't **care** how much **you know until they know** how much **you care.**'* opens the door to learning and is modeled in all aspects of Titus Academy.

Continuing with Dr. Dreikurs theory, Dr. William Glasser laid out Choice Theory which is the idea that the behavior of children is related to five basic needs; survival, love and belonging, power and significance, freedom and autonomy, and fun.

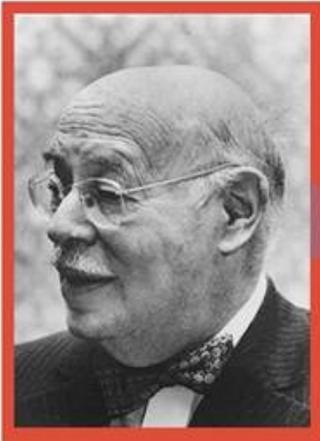
Both Dreikurs and Glasser offer concrete techniques to be employed in the classroom to manage discipline issues and set the classroom up for a year of success. Some of these techniques include:



Framework for Trinitas Academy Discipline Policy

Dr. Dreikurs – Adlerian Psychology

1. Always speak in positive terms, never be negative
2. Encourage students to strive for improvement, not perfection
3. Emphasize student strengths while minimizing weaknesses.
4. Help students learn from mistakes, which are valuable in learning
5. Encourage independence and the assumption of responsibility
6. Encourage students to help each other
7. Be optimistic and enthusiastic – a positive outlook is contagious.



Rudolf Dreikurs was an Austrian psychiatrist and educator who developed psychology

Alfred Adler's system of individual psychology into a pragmatic method for understanding the purposes of reprehensible behavior in children and for stimulating cooperative behavior without punishment or reward.

1 Dr. Rudolf Dreikurs

WHY Children Act Out:

1. Attention Getting
2. Power and Control
3. Revenge
4. Feeling Helpless or Inadequate

Dreikurs Techniques for Teachers

1. Encourage **IMPROVEMENT** not **PERFECTION**
2. Encourage students to **HELP ONE ANOTHER**
3. Emphasize student **STRENGTHENS** and minimize **WEAKNESSES**
4. Help students **LEARN FROM MISTAKES**, as valuable lessons
5. Encourage **INDEPENDENCE** and student **RESPONSIBILITY**
6. Always speak in **POSITIVE** terms, never **NEGATIVE**
7. Be **OPTIMISTIC & ENTHUSIASTIC** - a positive outlook is contagious!

Framework for Trinitas Academy Discipline Policy

Dr. Glasser – Choice Theory

1. Stress Student Responsibility
2. Set Classroom Rules
3. Model ACCOUNTABILITY
4. Teach Students to Make VALUE JUDGEMENTS
5. Suggests Reasonable ALTERNATIVES – lay out CONSEQUENCES
6. Be CONSISTANT and REVIEW your STRATEGY often

These philosophies are the basis for the discipline policy training for school leadership and teaching staff.

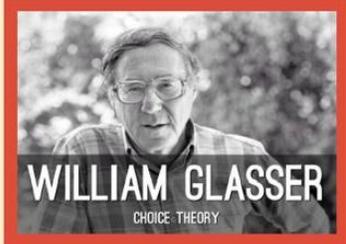
Once the foundations are understood then training will move to tactics. Trinitas Academy will use the following practical teaching outlines for day-to-day classroom management;

2 Dr. William Glasser - Choice Theory

Choice Theory is the idea that the behavior of children is related to five basic needs; survival, love and belonging, power and significance, freedom and autonomy, and fun.

Glasser's Techniques for Teachers

1. Stress student RESPONSIBILITY
2. Set classroom RULES
3. Accept NO EXCUSES
4. Help students make VALUE JUDGEMENTS
5. Suggest ALTERNATIVES and lay out CONSEQUENCES
6. Be CONSISTENT and REVIEW your STRATEGY often.



Following in the tradition of Alfred Adler, he has long been dedicated to teach our children how to develop their own healthy relationships with self and others, believing healthy, loving, and strong relationships are the core of happiness and mental health.

Harry Wong – First Day of School

1. Two important key factors are:
 - Room arrangement - Time management
2. Close proximity to a student – Circle the room
Distraction Times; The beginning of class, Transitions, the end of class
3. Procedures answer the question, “What do I do when...?”

Fred Jones – Tools for Teachers

1. Classroom Structure: Limit Setting – Responsibility - Training - Backup Systems
2. More time circulating the room while students are working
3. Practice and Praise, Prompt (Hand Raisers)
4. See, Say, Do Teaching (Quality Instruction)

Effective Teaching – Harry Wong <https://www.effectiveteaching.com/>

Tools for Teaching – Fred Jones <http://www.fredjones.com/tools-for-teaching>

Trinitas Academy Discipline Policy

The Trinitas Academy Discipline Policy reflects who we are as an organization and remains compliant with the legal mandates of school discipline. We believe it to reflect:

Our Mission: Consistent with the values we pursue in our mission statement.

Core Values: Academic Excellence, Partnering with Families and Children & Learning

Relational Discipline highlighting the parent-teacher-scholar relationship to bring out the best in the child. Teachers and scholars developing meaningful relationships will only increase the scholar's sense of belonging to the school.

Guiding Principal:

- Life lessons, accountability, responsibility and discipline are taught through natural consequences, rather than "punishment".
- Teachers and scholars developing meaningful relationships will only increase the scholar's sense of belonging to the school.
- Developing positive relationships is based on the Golden Rule - "Treat others as you would want to be treated yourself".

School Operation:

Learning is fun in a safe, interactive, vibrant and challenging environment.

- Everyone has the responsibility to contribute to the greater good of the school community.
- Recognizing the value of discipline policies and procedures in order to meet the Mission of our school for all stakeholders.

Trinitas Academy's Discipline Policy is divided into levels of infraction. These cover most of the issues that will arise in a K8 school setting

LEVEL 1 Misconduct

Level 1 misconduct is dealt within the setting the behavior took place in. Staff discretion regarding natural consequences and/or referral to administration or communicating with parents is afforded. If a pattern of Level 1 misconduct develops, it escalates the misconduct to a Level 2 and is dealt with accordingly.

Examples: (not limited to):

- Dress Code
- Minor Class Disruption
- Dishonesty
- Disrespect to staff, scholars, visitors and property
- *Rough-housing: pushing, shoving, wrestling*
- Inappropriate Display of Affection
- Profanity and/or inappropriate language or gestures
- Insubordination
- *Irresponsible in learning: tardies, excessive absences, incomplete homework, lack of effort and attentiveness, loitering in halls/bathrooms*

Trinitas Academy Discipline Policy

Level 1 Natural and Logical Consequences - Responsible Party: Teacher/Staff Member
Natural consequences occur without any enforcement on the part of the adult. Often, allowing the natural consequence to occur will prevent a teacher/scholar argument and the child will learn the right lesson. Logical consequences involve action taken by the adult.

Level 1 misconduct will result in a scholar filling out a Habit of the Heart Reflection Form and a Level 1 teacher given consequences. The teacher will keep a copy of the form in the scholar folder.

Examples (not limited to):

- 1. Friendly Reminder
- 2. Gentle Touch
- 3. Use of Proximity - get closer to scholar
- 4. Use the "Thinking Chair" (set amount of time)
- 5. Practice following directions on Scholar time (Recess, specials, etc.)
- 6. Hold in for lunch/recess (eat with teacher)
- 7. Go to "Buddy Teacher" classroom
- 8. Make up wasted time, during scholar time.
- 9. Uniform Violation results in loss of dress down
- 10. Create plan for behavior refinement on their own time
- 11. Ignore scholar's behavior, when they want to do something, they do not get the opportunity to make up tardies minutes, on scholar time.
- 13. Complete incomplete homework, receive no credit

****The aforementioned list contains just a few of the possible consequences for Level 1 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee.****

LEVEL 2 Misconduct

Level 2 misconduct will result in a referral to school administration and consequences will be assigned accordingly. Parents/Guardians will receive communication regarding this incident.

Examples (not limited to):

- Level 1 misconduct with staff referral
- Cheating
- Inappropriate clothing
- Defacing school property and/or equipment
- Plagiarism
- Racial slurs or derogatory comments
- Pushing and shoving with the intent to harm
- Defiance
- Theft
- Forgery
- Misconduct during events that include community participation

Trinitas Academy Discipline Policy

Level 2 Natural and Logical Consequences: Responsible Party: Administration

Level 2 misconduct will result in administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 2 consequence. The teacher will supply any and all previous documentation to administration and they will keep a copy of all documentation in scholar folder.

Examples (not limited to):

- Any Level 1 consequence for an extended period of time
- Community Service
- *In School Suspension*
- *Short Term Out of School Suspension (1-2) Days*

****The aforementioned list contains just a few of the possible consequences for Level 2 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee****

LEVEL 3 Misconduct

Level 3 misconduct will result in an IMMEDIATE referral to school administration and inquiry completed by administration designee to verify misconduct and determine consequence. Scholar, with presence of administrator, will call parent/guardian to inform of misconduct and possible consequence.

Examples: (not limited to)

Level 1 and/or Level 2 misconduct with staff referral or pattern of misconduct

- Fighting
- Physical Aggression toward another
- *Cheating on an exam or major assignment*
- Defiance
- Use of vulgarity/swearing
- Theft
- Vandalism
- Weapon
- Safety Concern of a dangerous nature
- Sexual behavior or intimations of such

Level 3 Natural and Logical Consequences: Responsible Party: Administration

Level 3 misconduct will result in IMMEDIATE administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 3 consequence. The teacher will supply any and all previous documentation to administration and they will keep a copy of all documentation in scholar folder.

Examples (not limited to):

- *In School Suspension*
- *Short Term Out of School Suspension (3-5) Days*
- *Behavior Contract upon Return (at discretion of Principal)*

****The aforementioned list contains just a few of the possible consequences for Level 3 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee and should be progressive in nature. ****

Trinitas Academy Discipline Policy

LEVEL 4 Misconduct

Level 4 misconduct will result in an immediate referral to school administration and requires immediate investigation and possible law enforcement involvement, long-term suspension or expulsion.

Example (not limited to):

- *Possession of a Weapon with the Intent to Harm*
- *Endangerment or Aggravated Assault*
- *Physical and Verbal Abuse of School Employee*
- *Arson/Explosive Devices*
- *Bomb Threats or any threat that impedes and/or disrupts the educational process*
- *Bullying: Physical, Verbal, Emotional, Cyber or Sexual*
- *Intimidation*
- *Sexual Harassment of any school community member*
- *Harassment of any school community member based on gender, sexual orientation, race, religion or ethnicity*
- *Possession of Illegal Substances*
- *Use of Illegal Substance on School property*
- *Intent to Sell or Distribute Illegal Substances*

Level 4 Natural and Logical Consequences: Responsible Party: Administration

Level 4 misconduct will result in IMMEDIATE administrative referral, scholar filling out a Habit of the Heart Reflection Form, scholar calling home to inform parent of misconduct, and a Level 4 consequence. The teacher will supply any and all previous documentation to administration to be kept in scholar folder.

Examples (not limited to):

- *Long Term Suspension (5 or more Days)*
- *Expulsion*

****The aforementioned list contains just a few of the possible consequences for Level 4 Misconduct. The implementation of consequences are given at the sole discretion of the administrator, teacher or administrator designee****

Trinitas Academy Discipline Policy

HARASSMENT AND BULLYING

Trinitas Academy will employ the following definition for harassment and bullying: systematic and/or continued unwanted and annoying actions by a person or group, including threats and demands. This behavior includes, but is not limited to, verbal, physical, or sexual harassment. All forms of harassment and bullying are strictly prohibited and result in severe disciplinary consequences. Behavior must meet these criteria to be defined as harassment and bullying:

The disciplinary provisions for bullying and cyberbullying apply to (1) bullying that occurs on or is delivered to school property or to the site of a school-sponsored or school-related activity on or off school property; (2) bullying that occurs on a publicly or privately owned school bus or vehicle being used for transportation of students to or from school or a school-sponsored or school-related activity; and (3) cyberbullying that occurs off school property or outside of a school-sponsored or school-related activity. For discipline to be imposed for off-campus cyberbullying, the conduct must either interfere with a student's educational opportunities or substantially disrupt the orderly operation of a classroom, school, or school-sponsored or school-related activity.

The Trinitas Academy Governing Board will formulate a policy which includes procedures concerning bullying that prohibit bullying and retaliation. This policy will include procedures for providing notice of an incident of bullying to a parent or guardian of the alleged victim on or before the third business day after the date the incident is reported. The policy will establish steps a student can take to seek assistance and interventions in response to bullying. The policy will include a set of available counseling options for a student who is a victim of or a witness to bullying or who engages in bullying. Reporting procedures, including anonymous reporting, will be established in the board policy statement. The established policy will prohibit disciplinary measures against a student who, after an investigation, is found to be a victim of bullying, on the basis of that student's use of reasonable self-defense in response to the bullying. The policy will address discipline for bullying of a student with disabilities comply with applicable requirements under federal law, including the Individuals with Disabilities Education Act (20 U.S.C. Section 1400 et seq.).

Trinitas Academy Discipline Policy

The principal of a public primary or secondary school, or the principal's designee, may make a report to law enforcement if, after an investigation is completed, the principal has reasonable grounds to believe that a student engaged in conduct that constitutes an assault under local penal code.

Each school year, the Titus Academy Principal will submit a report to the Governing Board that includes the number of conduct and discipline code violations at the school. Included in this report is the number of incidents and the actions taken in response to those incidents for several types of violations. Reporting includes behaviors that are detrimental to the safety of other students or school personnel, including but not limited to incidents of bullying...and other behavior that creates a threat of physical harm to the student or to other students. The school admin team will monitor annual results on how the culture is performing at the school and review any reported issues of bullying.

In-School Suspension

In School Suspension is used when a child continues to misbehave or disregards school expectations. While on in-school suspension, we hope to remove all distractions so that the child can focus strictly on academics. The parents will be notified when the decision to invoke in-school suspension is made. The parent/guardian may be expected to come to school for a conference within 48 hours if their child is placed on in-school suspension. The length of the in-school suspension is directly related to the offense, whether the scholar has taken responsibility for their actions, and potentially whether a parent has come up for a conference. A scholar on ISS will not be permitted to:

- Attend field trips
- Eat lunch in cafeteria
- Attend class with peers
- Participate in recess, PE, Art, Music or Language class
- Participate in after-school sports, music, or enrichment programs

Procedures for Short Term Suspensions

A short-term suspension is a denial to a scholar of the right to attend school and to take part in any school function for any period of time up to and including ten cumulative school days.

Step 1: The scholar will receive notice, written or oral, of the reason for suspension and the evidence the school authorities have of the alleged misconduct.

- After having received notice, the scholar will be asked for an explanation of the situation.
- The authorized School personnel involved shall make reasonable efforts to verify facts and statements prior to making a judgment.

Step 2: Provided that a written record of the action taken is kept on file, authorized School personnel may:

- Suspend the scholar for up to ten (10) days.
- Choose other disciplinary alternatives.
- Exonerate the scholar.
- Suspend the scholar for ten (10) days pending a recommendation that the scholar be given a long-term suspension or expulsion or both.

Trinitas Academy Discipline Policy

When suspension is involved:

- A parent must be notified before the scholar is allowed to leave campus. If no parent contact can be made, the scholar may be isolated until dismissal time and then given a written message to the parents.
- A letter to the parents will be written within a reasonable time to explain the terms (including the possibility that a long-term suspension and/or expulsion is being recommended) and reasons for the suspension and to request a meeting prior to the scholar returning to school.

No appeal is available from a short-term suspension and is provided at the discretion of the Principal.

Procedures for Long-Term Suspensions and Expulsions

A long-term suspension is a denial to a scholar of the right to attend school and to take part in any school function for any period of time equal to or exceeding eleven cumulative school days. An expulsion is the denial to a scholar of the right to attend school and to take part in any school function permanently.

When a scholar commits an offense that is eligible for long-term suspension or expulsion, the school shall (not necessarily in this order):

Investigation

- Notify the scholar of the charge(s)
- Accept information from the scholar and other persons who have knowledge of the incident. The scholar involved shall have the opportunity to express his/her side of the problem.
- Determine the accuracy of the charge(s) based on this information.
- Send written notification, by the end of the school day when possible, to the parent or guardian, or arrange for notification to be hand-delivered or sent certified mail within one school day informing him or her of the disciplinary infraction, the date and time for the Suspension or Expulsion Hearing, the right to appeal the outcome of the Suspension or Expulsion Hearing, and the scholar's status pending the hearing. A written notification of the outcome of the Bullying/Harassment A copy of this notification is filed in the scholar's cumulative folder in the school.
- The Principal will generally schedule the Suspension or Expulsion Hearing within two school days of the disciplinary infraction. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Principal. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will normally notify the parent or guardian of the discipline decision within one school day of the Suspension or Expulsion Hearing.

Trinitas Academy Discipline Policy

Implementation

Once the Principal or Principal's Designee have determined that a long-term suspension or expulsion is warranted, he/she shall proceed as follows:

- Inform the scholar of the decision and the reason(s).
- Notify the parent by telephone or in person.
- Send written notification, within one school day of the Suspension or Expulsion Hearing to the parent or guardian, or arrange for notification to be hand-delivered or sent certified mail within 24 hours informing him or her of the suspension, the reason for the suspension or expulsion, the length of the suspension, the right to appeal, and the scholar's right to return to school at the end of the suspension, and any conditions for that return (a re-entry conference with the parent or legal guardian is mandatory). A copy of this notification is filed in the scholar's cumulative folder in the school.

Special Notes Concerning Suspension

Counting of Suspension Days

Suspension days shall be counted as follows:

- The day the scholar left school should be counted as a part of the suspension, provided he/she was denied class participation before 12 noon of that day.
- The suspension shall terminate at midnight on the day listed as the last day of suspension.
- Times when school is not officially scheduled are not to be counted as part of the suspension time. (Should school be cancelled for any reason during a scheduled suspension day, the suspension will lengthen to include the time school was actually in session.)

Make Up Work for Suspension

Scholars who are suspended shall be offered make-up work assignment. It is the responsibility of the parent/guardian to contact the school and make arrangements for the receipt and return of all assignments. In the case of long-term suspensions, unless other arrangements are made, teachers are to give work in two-week increments, and scholars must complete and return work before receiving additional work. All IDEA mandates will be followed for scholar with disabilities.

Participation at School and School Related Activities

Scholars who have been suspended from school shall not be eligible to participate in any school functions for the entire period of their suspension.

Repeat Offenders

Scholars who continue to be suspended whether in-school or short or long term may be expelled from Cato. Scholars who have been suspended for 3 separate offenses or more times in their entire duration at Cato may be expelled.

Discipline for Scholars with Disabilities (Qualifying under IDEA or 504)

Trinitas Academy Discipline Policy

Suspension for ten days or less.

Short-term suspension (ten [10] days or less) may be used for special education scholars for disciplinary reasons on the same basis as for a regular education scholar. (It is not considered a change of placement.)

Step 1: The scholar will receive notice, written or oral, of the reason for suspension and the evidence the school authorities have of the alleged misconduct.

- After having received notice, the scholar will be asked for an explanation of the situation.
- The authorized School personnel involved shall make reasonable efforts to verify facts and statements prior to making a judgment.

Step 2: Provided that a written record of the action taken is kept on file, authorized School personnel may:

- Suspend the scholar for up to ten (10) days.
- Choose other disciplinary alternatives.
- Exonerate the scholar.
- Suspend the scholar for ten (10) days pending a recommendation that the scholar be given a long-term suspension or expulsion or both.

When suspension is involved:

- A parent must be notified before the scholar is allowed to leave campus. If no parent contact can be made, the scholar may be isolated until dismissal time and then given a written message to the parents.
- A letter to the parents will be written within a reasonable time to explain the terms (including the possibility that a long-term suspension and/or expulsion is being recommended) and reasons for the suspension and to request a meeting to solicit their help.

No appeal is available from a short-term suspension.

Suspension for over ten days

If a special education scholar is recommended for a suspension of more than ten (10) days during the school year (a possible change in placement), a manifestation determination conference must be held.

Steps 1 and 2 above apply

Step 3: A recommended suspension of a special education scholar for more than ten (10) consecutive days, or a series of suspensions totaling more than ten (10) days, may constitute a change of placement and shall require a manifestation determination conference. Such a conference will be for the purpose of determining whether or not the is a manifestation of the scholar's disability and whether or not the school followed the scholar's IEP and/or 504.

Step 4: If the offense is not a manifestation of the scholar's disability and the school was in compliance with the scholar's IEP or 504, the scholar may be suspended by following the School policies for scholars in general, provided that educational services are continued during the period of disciplinary removal for a scholar with a disability qualified under the Individuals with Disabilities Education Act (IDEA). A scholar with a disability qualified for educational services under the Americans with Disabilities Act or Section 504 of the Rehabilitation Act of 1973, and not qualified under IDEA, may be suspended or expelled from school, and educational services will not be provided, if nondisabled scholars in similar circumstances do not continue to receive educational services.

Step 5: If the behaviors are a manifestation of the disability of the scholar, the School may not extend the suspension of the scholar beyond the initial ten (10) school days.

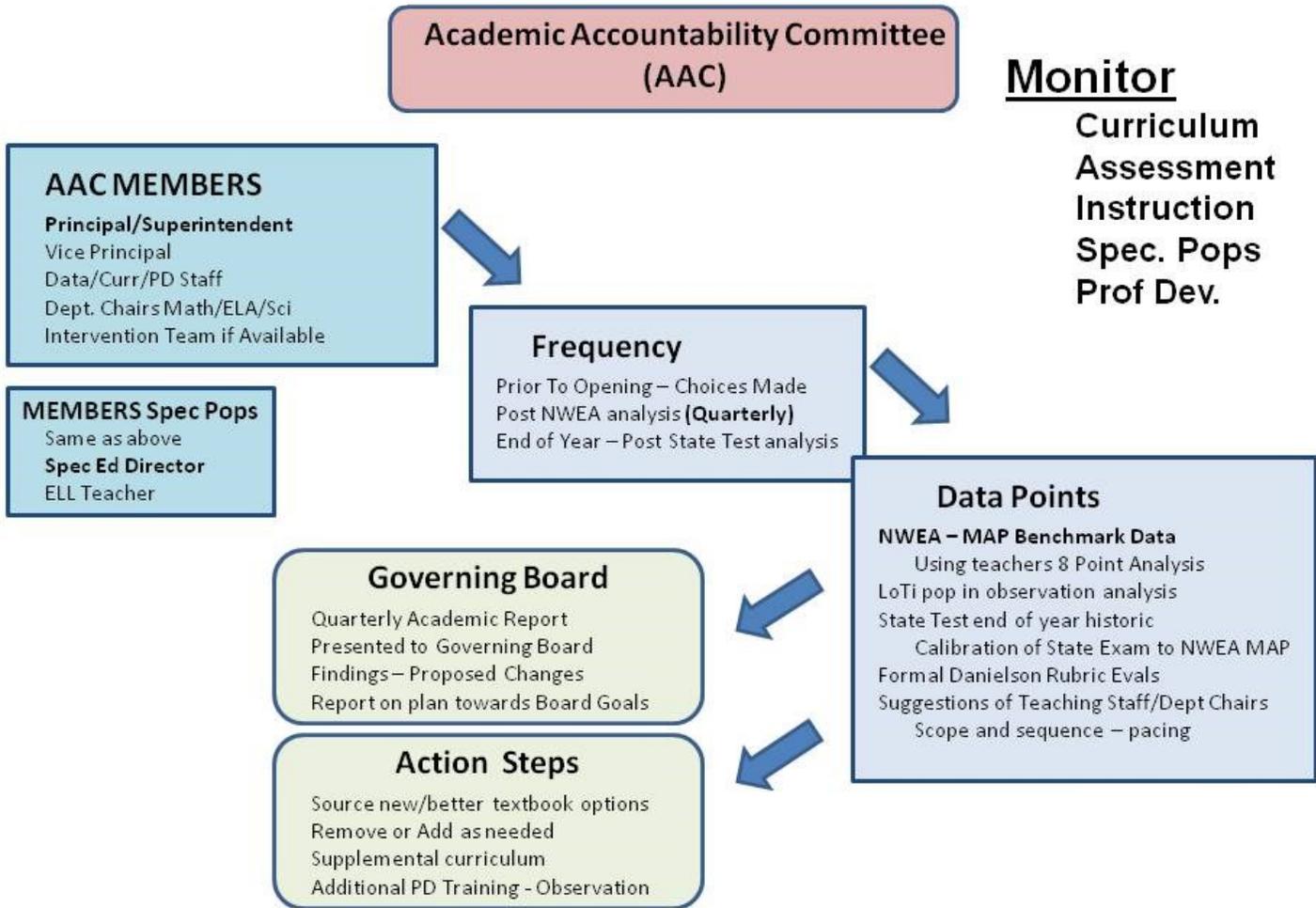
Trinitas Academy Discipline Policy

Right of Appeal

A parent or guardian may make a written request to the school Principal to appeal a long-term suspension or expulsion within one school day of receiving notification of the suspension. The Principal will generally schedule the Appeal Hearing within two school days of receiving the written request. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Principal. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Principal will normally notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension is overturned, the cumulative record of the scholar and any other school-maintained records will reflect that conclusion. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

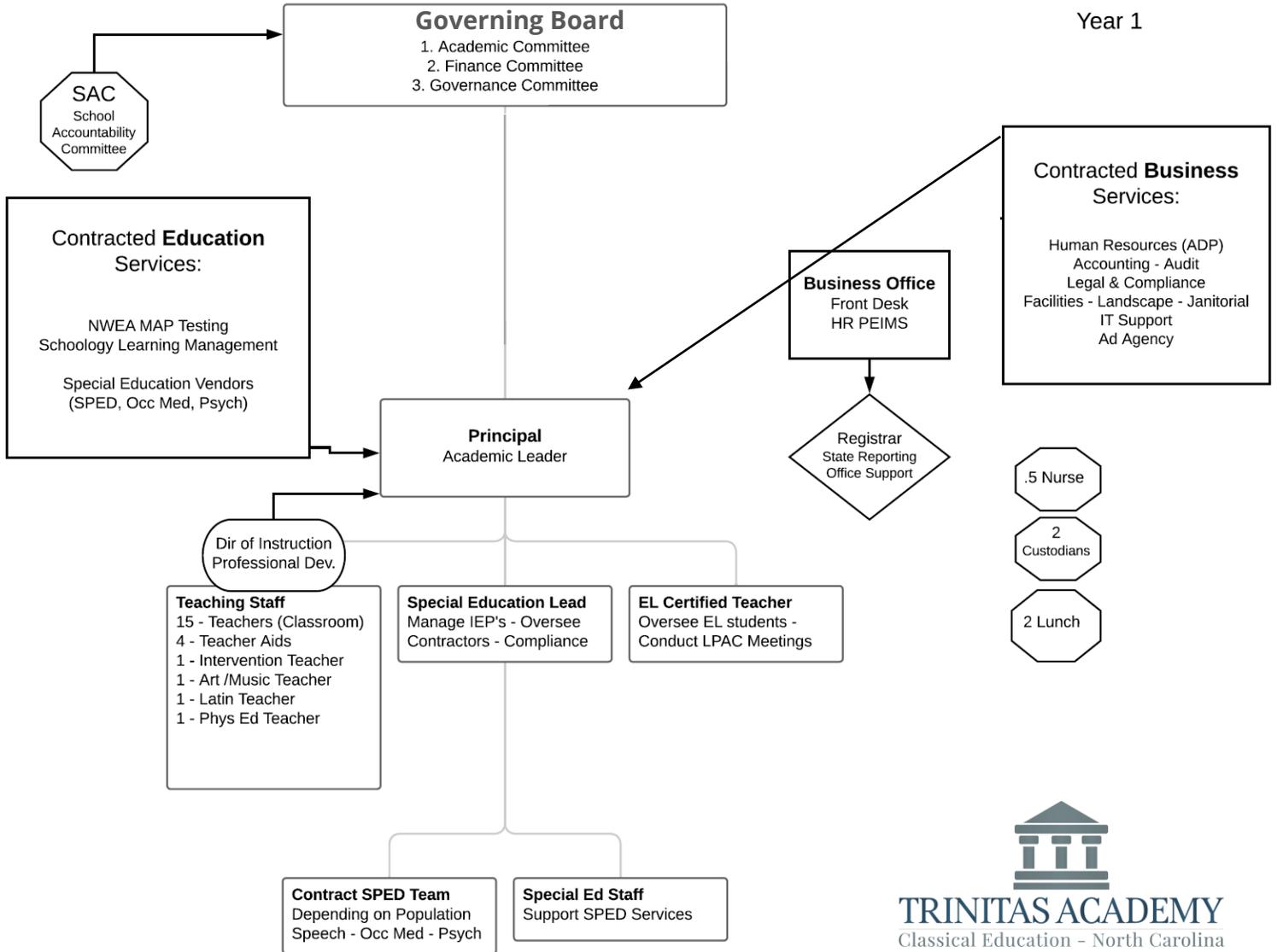
If the suspension or expulsion is upheld and the parent or guardian wants to continue the appeal process, the parent or guardian may make a written request to the Titus Board Designee, stating why the suspension should be reversed or modified within two school days receiving the Titus Discipline Committee Appeal Hearing decision. The Hearing Officer will generally schedule the Appeal Hearing within two school days of receiving the written request. The scholar may be represented at the hearing only by parents or guardians and one additional adult, who may be legal counsel, a member of the clergy, a social worker, etc. The hearing will be conducted by the Titus Board Discipline Committee. The hearing shall be closed to the public and may include the presentation of evidence, testimony, and questioning of those present. The hearing will not be recorded verbatim by stenographic, tape, or other means. The Titus Board Designee will normally notify the parent or guardian of the decision within one school day of the Appeal Hearing. If the suspension or expulsion is overturned, the cumulative record of the scholar and any other school-maintained records will reflect that conclusion. If the Titus Board Discipline Committee upholds the suspension, the suspension shall be imposed, and such decision will be final. If a parent or guardian fails to appear for a scheduled appeal hearing, the right to appeal is waived, and the original disciplinary decision will stand.

Academic Progress Monitoring & Reporting



The **Academic Accountability Committee (AAC)** shown above. Is convened quarterly and made up of the school Principal, Vice Principal, Data Curriculum Professional Development Director, Special Populations team and master teachers. Their role is to review the teacher's analysis of the NWEA-Map benchmark assessments (within the 8 Step Teacher Data Framework) and make recommendations to improve academic performance to the Principal. Their report is provided to the Governing Board's Academic Committee four times per year.

Year 1



<u>Board Member Name</u>	<u>Board Title</u>	<u>Phone Number</u>	<u>Email Address</u>	<u>County of Residence</u>	<u>Current Occupation</u>	<u>Past or Present Professional Licenses Held</u>	<u>Any disciplinary action taken against any of these professional licenses?</u>	
Mark Lockman	Board Chair	704-818-7000	mlockman@rlwest.com	Iredell	Real Estate	None	None	None
Walter Tribolet Phd	Vice Chair	704-763-2467	walte_tribolet@yahoo.com	Iredell	Chemical Manufacturing	None	None	None
Mikail Clark Esq	Board Member	704 338 5286	mclark@jahlaw.com	Iredell	Lawyer	Lawyer - Part of the North Carolina Bar Association	None	None
Judge Marcus Long	Board Member	540-577-0775	longmarcus50@gmail.com	Iredell	Retired Judge	Lawyer - Part of the Virginia Bar Association	None	None
Susan Tillis	Board Member	704-999-2889	tillis.susan@gmail.com	Iredell	Foundation Chair	Licensed Real Estate Agent	None	None
Joe Higgins	Board Member	520-631-7400	joe@joehigginsinc.com	Pima	Classical Education Services	None	None	None
Anthony Famiglietti	Board Member	917-370-3653	runfam@protonmail.com	Iredell	Athletic Coaching	None	None	None
Will Bowen	Board Member	252-432-0407	jbowen1745@gmail.com	Iredell	Cong Patrick Henery Staff	None	None	None

Area of Proposed Coverage

Comprehensive General Liability

Officers and Directors/Errors and Omissions

Property Insurance

Automobile Liability

Crime Coverage - Minimum/Maximum Amount

Worker's Compensation

Other Coverage

Total Cost

Proposed Amount of Coverage

\$1,000,000.00/occurrence

\$1,000,000.00/occurrence

\$1,000,000.00/occurrence

\$250,000.00 | \$250,000.00

\$500,000.00

Cyber, Abuse, Umbrella, Defense,

\$32,750

Cost (Quote)

\$4,000

\$3,800

\$6,000

\$750

\$400

\$5,000

\$10,800



Trinitas School
Mooresville, North Carolina

IMA Education Practice
Date: 3/15/2024
Attention : Joe Higgins

RE: Insurance Budget- Trinitas School

Projected budget for Year 1- Commercial Insurance

<u>Coverage:</u>	<u>Annual Cost:</u>
• <i>General Liability: (1M/3M)</i>	<i>\$4,000</i>
• <i>Employment Practices Liability: (1M/3M)</i>	<i>\$2,000</i>
• <i>Directors & Officers Liability: (1M/3M)</i>	<i>\$3,800</i>
• <i>Abuse & Misconduct Liability: (1M/3M)</i>	<i>\$1,500</i>
• <i>Law Enforcement Liability: (1M)</i>	<i>\$500</i>
• <i>Non-Monetary Defense Liability: (250K)</i>	<i>\$500</i>
• <i>Excess Liability (Umbrella): (3M)</i>	<i>\$3,800</i>
• <i>Hired Non-Owned Auto: (1M)</i>	<i>\$750</i>
• <i>Property: Contents (500K-contents)</i>	<i>\$6,000</i>
• <i>Workers Compensation (1M/1M/1M)</i>	<i>\$5,000</i>
• <i>Student Accident & Catastrophic (1M)</i>	<i>\$1,500</i>
• <i>Cyber Liability: (1M)</i>	<i>\$3,000</i>
• <i>Crime-Fiduciary Liability: (250K)</i>	<i>\$400</i>

Annual Premium Projection: **\$32,750**

**Michael Nutting, Kevin Melvin, CSRM (IMA
Education Practice)**

Certified School Risk Manager

4000 Park Rd, Charlotte NC 28209

- Include a description of workers' compensation insurance and the amounts. **Exclusive remedy for on-the-job injuries \$1,000,000. (1M/1M/1M).**
- Include a description of liability insurance and the amounts to be obtained by the charter school. **General Liability, D&O, EDU Legal, Employment Practices, Sexual Abuse and Molestation, Employee Benefit Liability, Hired & Non-Owned Auto, will have \$1,000,000 per occurrence underlying coverage and 3,000,000 aggregate. These coverages will share a following form Excess policy of \$3,000,000 and that limit will be reviewed annually for necessary/appropriate increases. Workers Compensation will have a part 2 limit of \$1,000,000 with the same Excess policy following form. Crime/Employee Theft/Fidelity with carry a limit of \$250,000.**
- Include a description of the insurance to cover loss to the school building and contents for fire and theft. **Traditional property insurance for Building, Contents (BPP) as well as Business Income. The Building and Contents will be carried at replacement cost and Business Income at \$1,000,000.**
- Include a description of indemnity insurance against civil and criminal liability for the charter school to protect the sponsor, the members of the board of the sponsor, and the employees of a sponsor acting in their official capacity with respect to all activities related to the charter school. **Included in D&O coverage \$1,000,000 per occurrence underlying coverage and 3,000,000 aggregate with \$3,000,000 following form Excess policy.**
- Include a description of automobile insurance and both property and liability insurance. **Any owned auto will carry \$1,000,000 (as well as hired and non-owned) in underlying coverage with shared Excess coverage of \$3,000,000.**
- Indicate whether the charter school will obtain any other type, or types, of insurance. For each type, include a description and estimated cost of coverage. **Student Accident/Travel of \$25,000 per occurrence and \$1,000,000 per catastrophic claim with estimated cost \$1,500. Adverse Event coverage or \$300,000 included in GL Premium. Also, to include a Cyber Liability policy with a limit of \$1,000,000 and cost of \$3,000, annually.**
- Insurance Documents—for each type of insurance listed, a statement from a North Carolina–licensed insurance company or the state insurance reserve fund stating the charter school applicant's ability to secure the insurance and an estimate of the cost of the insurance, if available **This NC Charter School is able to secure all insurance required/requested from an "A" rated insurance carrier which is admitted in the State of North Carolina.**

Math

Math	Saxon Math 1 Student Kit, 32
Math	Saxon Math 2 Student Kit, 32
Math	Saxon Math 3 Student Kit, 32
Math	Saxon Math Intermediate 4 Student Edition
Math	Saxon Math Intermediate 5 Student Edition
Math	Saxon Math Course 1 Student Edition
Math	Saxon Math Course 2 Student Edition
Math	Saxon Math Course 3 Student Edition
Math	Saxon Math Course 1-3 Manipulative Kit
Math	Saxon Math Algebra 1 Student Edition

Science

Bio	Hudson, Paige. Biology for the Grammar - Logic Stage. Teacher Edition Only
Chem	Hudson, Paige. Chemistry for the Grammar - Logic Stage
Physics	Hudson, Paige. Physics for the Grammar - Logic Stage
Earth	Hudson, Paige. Earth Science & Astronomy for the Grammar Logic Stage

Latin

Latin 1	Cambridge Latin Course 1 Teachers Edition
Latin 2	Cambridge Latin Course 2 Teachers Edition
Latin 1	Cambridge Latin Course 1 Student Edition
Latin 2	Cambridge Latin Course 2 Student Edition

Logic

Logic	Memoria Press Logic Course 1 Teacher Edition
Logic	Memoria Press Logic Course 1 Student Edition
Logic	Memoria Press Logic Course 1 Quizzes and Tests
Logic	Memoria Press Logic Course 1 Student Workbook
Logic	Memoria Press Logic Course 2 Teacher Edition
Logic	Memoria Press Logic Course 2 Student Edition & Workbook
Logic	Memoria Press Logic Course 2 Quizzes and Tests

Literature - Novels

ELA	Sample Literature List (For Budgeting Purposes)
ELA	<i>Adventures of Huckleberry Finn</i> 978-1530949281
ELA	<i>Red Badge of Courage</i> by Stephen Crane (1895) 978-0486264653
ELA	<i>All Quiet on the Western Front</i> by Erich Remarque (1929)978-0449213940
ELA	<i>To Kill A Mockingbird</i> by Harper Lee (1960) 978-0446310789
ELA	<i>Night</i> by Elie Wiesel (1960) 978-0374500016
ELA	<i>1984 - George Orwell</i> 978-0451524935

Sample Literature List (For Budgeting Purposes)

ELA	Call of the Wild, London 978-0486264721
ELA	Alice's Adventures in Wonderland, Carroll 978-1402725029
ELA	My Brother Sam Is Dead, James Lincoln Collier 978-0439783606
ELA	Much Ado About Nothing, Shakespeare (Translated Text) 978-0743482752
ELA	The Scarlet Pimpernel 9780451527622
ELA	Gulliver's Travel 9780141366302

Athletic Supplies One Time and Consumable
Science Lab Set Up - One time and Consumable
Art Supplies One Tme and Consumable

105.00	\$93	\$9,718	
105.00	\$11	\$1,188	
75.00	\$93	\$6,941	
75.00	\$11	\$848	
75.00	\$93	\$6,941	
75.00	\$11	\$848	
60.00	\$93	\$5,553	
60.00	\$11	\$679	
60.00	\$93	\$5,553	
60.00	\$11	\$679	
		\$38,948	\$38,947

4	\$31	\$124	
4	\$41	\$164	
4	\$41	\$164	
4	\$41	\$164	
		\$616	\$616

2	\$50	\$100	
2	\$50	\$100	
120	\$41	\$4,914	
120	\$41	\$4,914	
		\$10,028	\$10,028

1.00	\$10	\$10	
60.00	\$14	\$840	
60.00	\$5	\$300	
60.00	\$16	\$957	
1.00	\$10	\$10	
30.00	\$30	\$899	
30.00	\$5	\$150	
		\$3,165	\$3,165

90	\$4	\$378	
90	\$3	\$252	
90	\$5	\$440	
90	\$10	\$944	
90	\$7	\$627	
90	\$7	\$629	
2		\$3,271	\$6,541

90	\$2	\$189	
90	\$7	\$627	
90	\$5	\$440	
90	\$4	\$377	
90	\$3	\$312	
90	\$4	\$377	
2		\$2,323	\$4,646

			\$37,500
			\$29,000
			\$18,100
			\$148,543

Attachment O – Start Up Plan – Trinitas Academy

Trinitas Academy has negotiated a lease with Langtree Group which includes initial start up and fixturation costs detailed below. Langtree Group will provide the start-up funds necessary to cover the expenses that will occur in the start-up process before the state revenue is received. The commercial lease with Langtree Group has been enclosed noting the amount of the Start Up funds budgeted in the amount of \$400,000 (additional dollars are included to prepare the campus for occupation).

Terms of this lease include source and use of funds as follows:

The Start-Up Budget describing the budgeted start-up costs as follows:

Administration/Instruction/Support

Principal	\$ 38,628
Clerical	\$ 14,000
Office supplies	\$ 36,400
<u>Curriculum & Resource Materials</u>	<u>\$148,985</u>
Total Administration/Instruction/Support	\$227,385

Operations & Maintenance

Marketing	\$70,000
Student Technology Equipment	\$59,119
<u>Office Technology Equipment</u>	<u>\$25,887</u>
Total Operations & Maintenance	\$155,006

Total Expenditures \$382,391

Contingency Fees \$ 17,609

Total Start Up Expenditures \$400,000

Start-Up Budget Assumptions

Expenditure Assumptions

Principal- The Trinitas Academy Governing Board will establish board policies processes the school will use for financial planning, accounting, purchasing, and payroll. The expertise of the Governing board in these areas will be instrumental in policy formation. In addition to the first year board training, the Governing Board will seek outside expertise from the North Carolina Department of Education and allied professionals with a background and expertise in charter school management.

- Academy will hire a Principal three (3) months in advance of school opening. Salary expense calculated as 25% of \$103,000 (plus benefits) annual salary or \$38,628. Salary based on Iredell School District pay scale 2021-2022.
- Clerical Staff- Trinitas Academy will hire clerical staff three (3) months in advance of school opening. Salary expense calculated as 25% of \$40,000 (plus benefits) annual salary or \$14,000.
- Office Supplies- Trinitas Academy will purchase 40% of its Equipment and Supplies budget to effectively register students and operate the functions of high school prior to opening day, total \$25,772 as described below:

Copiers	\$8,000
Office Start Up	\$ 5,372
Teacher Supplies	\$9,400
<u>Raptor Security System</u>	<u>\$2,000</u> (<i>Drivers License Check for visitors on campus</i>)
Total	\$25,772

- Marketing- Trinitas Academy has budgeted year zero marketing cost prior to opening day, total \$70,000 per Marketing Budget for the school launch. Annual marketing budgets will be included in the school's annual budget. This amount represents only the amount to be paid from start-up funds and is budgeted and to be paid for from capital funding for the overall development cost of the school facility. Overall facility sources and uses of funds included in this application.
- Office Technology Equipment- Trinitas Academy will purchase \$25,887 of the office technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.

Document Cameras	\$289 x 20	= \$ 5,780
Servers		= \$12,500
<u>Firewall</u>		<u>= \$ 7,607</u>

Total \$25,887

- Student Technology Equipment- Trinitas Academy will purchase \$59,119 of the student technology budget prior to opening day. This amount represents only the amount to be paid from start-up funds and it is in addition to the FFE budget to be paid for from capital funding for the overall development cost of the school facility.

Staff Chromebooks \$349 each * 22 = \$9,319

Student Chromebooks \$249 each * 200 = \$49,800

Total \$59,119

- Curriculum & Resource Materials- Trinitas Academy will purchase curriculum materials and equipment prior to opening day, total, \$148,985 to include teacher and student resources for Math, ELA, Science, History, Logic, Latin, art supplies, music start up supplies and physical education start up items.
- All operations and maintenance will be reflected in Year 1 budget. Contracted services including HR, accounting/audit, landscaping, janitorial will be reflected in the Year 1 budget.

The principal and office manager are budgeted to be hired in May of 2024. Budgets reflect salary and benefits for their initial salary to be incurred during Year 0.

Position

Principal/School Leader

Assistant Principal

Director of Instruction

Additional School Leadership

Year 0 Year 1 Year 2 Year 3 Year 4 Year 5

1	1	1	1	1	1
0	1	1	2	2	2
0	1	1	1	1	1

Core Classroom Teachers (inc lang, art, specials)

	24	28	34	38	40
	2	2	3	4	4
	1	1	2	2	2
	1	1	2	2	2
	4	4	6	6	6

Special Education

Intervention

ELL Specialist

Teaching Aides or Assistants

Business Manager

Registrar

0.3	1	1	1	1	1
	1	1	1	1	1

Nurse

Custodian

Lunch Services

	0.5	1	1	1	1
		2	2	3	3
		2	2	2.5	2.5

Boen Nutting, Ed.D

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 (704) 902-6010*

Education

2001 **Doctor of Education.** Educational Administration. The University of North Carolina at Charlotte, Charlotte, NC. Dissertation, The Knowledge, Attitudes and Opinions of Parents Toward Special Education in the Piedmont Region of North Carolina.

1997 **Master of Education.** Educational Leadership. The University of North Carolina at Charlotte, Charlotte, NC. Also completed Curriculum Specialist Certification.

1992 **Bachelor of Science in Education.** Early Childhood Education. The University of Georgia, Athens, GA.

Professional Experience

2023- **Adjunct Professor and University Supervisor: MEd Program,** Gardner-Webb University

2023 **Assistant Superintendent,** Iredell-Statesville Schools

2020 **Chief of Strategic Planning & Student Services,** Iredell-Statesville Schools

2018 **Director of Communications & Development,** Iredell-Statesville Schools

2011-2018 **Principal,** Mt. Mourne School, An IBO World School - Top Performing Middle School in the Charlotte Metro Region; 2012-13, 2013-14, 2014-15, 2015-16

2007-2011 **Principal,** Lake Norman Elementary School, Mooresville, NC Highest district growth in Reading and Math 2009-10, 2010-2011

2003-2007 **Director of Human Resources and Public Information,** Mooresville Graded School District

2000-2003 **Public Information Coordinator**, Mooresville Graded School District

1999-2000 **Assistant Principal**, Mooresville Senior High School, Mooresville, NC

1997-2000 **Assistant Principal**, West Lincoln Middle School Lincolnton, NC

1992-1997 **Teacher**, W.R. Odell Elementary School, Concord, NC.

Organizations and Offices Held

2023-present: Board of Directors, Bridge of Hearts

2022-present: Board of Directors, Boys and Girls Club of Piedmont, Statesville, NC

2018-present: Top of the Lake Rotary – Mooresville, NC

2018: Daughters of the American Revolution; Mary Slocumb Chapter

2018: American Association of Suicide Prevention – NC Piedmont

2016: Assoc. Member of Graduate Faculty – UNC-Charlotte College of Education

2015-2020: University of Georgia College of Education Alumni Board

2015-present: Board of Directors, Iredell Health Systems

2015-2017: Board of Directors, Lowe's YMCA of Lake Norman

2014-2017: Lowe's Home Improvement Lake Norman Hometown Grant Committee

2007-2009: Board of Directors, Lowe's YMCA of Lake Norman

2000-2013: Board of Directors, Mooresville Lake Norman United Way
2003 Campaign Chair
2004 Board Chairman
2005-2006 Community Investment Chair

2002-2008 Board of Directors, Community Housing Dev. Corp of MSI

2003-2007 Board of Directors, Junior Achievement of Iredell County

2003-2005 Race City Civitans, Mooresville, NC

2000-2004 Education Committee co-chair; Mooresville-South Iredell Chamber of Commerce

2001-2002 Mooresville-South Iredell Chamber of Commerce Leadership MSI participant

Honors and Awards

2021 Top of the Lake Rotary Service Above Self Award

2019 Iredell-Statesville Schools Principal of the Year Finalist

2017 China-USA Cultural Exchange: Search for Cultural Power Program, Chosen by the Superintendent to represent Iredell Statesville Schools for 12 days in China; signed official partnerships with 5 schools (Beijing, Chongqing, Chengdu)

Iredell-Statesville Schools Principal of the Year Finalist 2015, 2016

Named one of the 50 Most Powerful Women in the Lake Norman Region 2013 and 2014

North Carolina Association of Scholastic Activities Principal of the Year 2013

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University of North Carolina World View: Senegal, Africa Study Visit, 2012 - Selected to participate with educators from around North Carolina in 11 days actively exploring education, culture, religion, and issues impacting youth in Senegal.

Recipient: North Carolina School Public Relations Blue Ribbon Award for Effective Communication 2001, 2003, 2004, 2005, 2006, 2018

Young Careerist of the Year 2001. Business and Professional Women's Association of Iredell County

Tropical Ecology Institute 1996 Belize, Central America – one of 12

teachers/administrators chosen from the state of North Carolina to study science, culture, and conservation in Belize, Central America

Rose Award, 1991 – Alpha Omicron Pi Sorority, University of Georgia – given to most outstanding contributing member of 180-member sorority

Presentations and Training

2024 Trauma Resource Institute - Community Resilience Model Training Goal is to help to create “trauma-informed” and “resiliency-focused” communities that share a common understanding of the impact of trauma and chronic stress

2023-2024 Our State, Our Well Being 12-month initiative to identify and implement strategies to improve mental health and reduce the number of suicides in North Carolina, launched by Carolina Across 100 and the UNC Suicide Prevention Institute

2021 NC Aspiring Superintendent Program - Cohort V

Panelist: Inspiration, Education, and Celebration – Mooresville/Lake Norman Professional Women’s Network Conference: 2019,
Mooresville, NC Participated in an 8-woman panel to embolden attendees to have courage in their daily lives, whether it be in the workplace or at home

Columbia University Teachers College - Leadership Institute for School Change: 2018, NY, NY Participated in a two-day workshop on developmental approaches to feedback for educators

International Baccalaureate Category III Leadership in International Education: Leading with a Clear Vision and Strategy 2017, Vancouver, BC

Presenter: 2015 NCAPA’s Fall Instructional Symposium, IGNITE: Creating Digital Schools & Classrooms that Spark Powerful Learning, Pinehurst, NC *Planning and Implementing Blended Learning*

Iredell-Statesville School District Representative: Next Generation Planning for Innovation Peer District Forum 2014, Atlanta, GA Bill and Melinda Gates Foundation.

Presenter: IB Conference of the Americas 2014, Washington, DC
Criteria-Related Grading in the Middle Years Programme

NCDPI Global Ready Designation Team 2014: invited to be a member of workgroup for the purpose of developing the framework for a Global Ready Schools Designation for schools and districts in North Carolina

Presenter: 2013 Baldrige Regional Conference, Dallas, TX *Using Feedback to Drive School and District Improvement*

International Baccalaureate Category III Head of School Training 2011
Salt Lake City, Utah

Publications

Alison N. Cernich, PhD; Sonia Lee, PhD; Diana W. Bianchi, MD **Navigating a Pandemic in the K–12 Setting: Keeping Our School Communities Safe. Published in Pediatrics (2021)**

Nutting, B., Algozzine, B., **Predictors of Parents' Inclusion Decisions.** Journal of School Public Relations. (Spring 2006)

Nutting, B., Porfeli, E. J., Queen, J. A., and Algozzine, B. (2006) **Parent belief and knowledge about special education and the Individuals with Disabilities Act.** Journal of Special Education Leadership 19(2). 48-61.

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University of North Carolina World View: Senegal, Africa Study Visit, 2012 - Selected to participate with educators from around North Carolina in 11 days actively exploring education, culture, religion, and issues impacting youth in Senegal.

Recipient: North Carolina School Public Relations Blue Ribbon Award for Effective Communication 2001, 2003, 2004, 2005, 2006, 2018

Young Careerist of the Year 2001. Business and Professional Women's Association of Iredell County

Tropical Ecology Institute 1996 Belize, Central America – one of 12

teachers/administrators chosen from the state of North Carolina to study science, culture, and conservation in Belize, Central America

Rose Award, 1991 – Alpha Omicron Pi Sorority, University of Georgia – given to most outstanding contributing member of 180-member sorority

Presentations and Training

2024 Trauma Resource Institute - Community Resilience Model Training Goal is to help to create “trauma-informed” and “resiliency-focused” communities that share a common understanding of the impact of trauma and chronic stress

2023-2024 Our State, Our Well Being 12-month initiative to identify and implement strategies to improve mental health and reduce the number of suicides in North Carolina, launched by Carolina Across 100 and the UNC Suicide Prevention Institute

2021 NC Aspiring Superintendent Program - Cohort V

Panelist: Inspiration, Education, and Celebration – Mooresville/Lake Norman Professional Women’s Network Conference: 2019,
Mooresville, NC Participated in an 8-woman panel to embolden attendees to have courage in their daily lives, whether it be in the workplace or at home

Columbia University Teachers College - Leadership Institute for School Change: 2018, NY, NY Participated in a two-day workshop on developmental approaches to feedback for educators

International Baccalaureate Category III Leadership in International Education: Leading with a Clear Vision and Strategy 2017, Vancouver, BC

Presenter: 2015 NCAPA’s Fall Instructional Symposium, IGNITE: Creating Digital Schools & Classrooms that Spark Powerful Learning, Pinehurst, NC *Planning and Implementing Blended Learning*

Iredell-Statesville School District Representative: Next Generation Planning for Innovation Peer District Forum 2014, Atlanta, GA Bill and Melinda Gates Foundation.

Presenter: IB Conference of the Americas 2014, Washington, DC
Criteria-Related Grading in the Middle Years Programme

NCDPI Global Ready Designation Team 2014: invited to be a member of workgroup for the purpose of developing the framework for a Global Ready Schools Designation for schools and districts in North Carolina

Presenter: 2013 Baldrige Regional Conference, Dallas, TX *Using Feedback to Drive School and District Improvement*

International Baccalaureate Category III Head of School Training 2011
Salt Lake City, Utah

Publications

Alison N. Cernich, PhD; Sonia Lee, PhD; Diana W. Bianchi, MD **Navigating a Pandemic in the K–12 Setting: Keeping Our School Communities Safe. Published in Pediatrics (2021)**

Nutting, B., Algozzine, B., **Predictors of Parents' Inclusion Decisions.** Journal of School Public Relations. (Spring 2006)

Nutting, B., Porfeli, E. J., Queen, J. A., and Algozzine, B. (2006) **Parent belief and knowledge about special education and the Individuals with Disabilities Act.** Journal of Special Education Leadership 19(2). 48-61.

Trinitas Academy will implement the LoTi Teacher Evaluation System, (Levels of Teaching Innovation), teacher evaluation and student engagement system. Through pop in observations and calibrated scoring by multiple admin team members, LoTi delivers consistency in teacher training and curriculum implementation. The LoTi observation and tracking platform allow the PD Team and the site Administration to score and observe teaching staff. The scoring metrics are consistent and measurable and allows the Titus Academy admin to identify issues and put in corrective actions. The target of no less than 10 LoTi pop-ins will be established for each teacher in a quarter.

NAME:

SCHOOL:

EVALUATOR:

DATE/TIME:

TENURE STATUS:
 Tenured
 Non-Tenured

PRE-OBSERVATION CONFERENCE NOTES:

DATE OF POST-OBSERVATION CONFERENCE:

CO-OBSERVATION:
Is this a Co-Observation?
 Yes; This is a Co-Observation and I am the primary observer
 Yes; This is a Co-Observation and I am the secondary observer
 No; This is not a Co-Observation

Report Co-Observation?
 Yes; Formally report observation data
 No; This is an observation for training purposes only

Name of Co-Observation Partner:

TYPE OF OBSERVATION:
Announced or Unannounced?
 This is an Announced Observation
 This is an Unannounced Observation

Long or Short?
 This is a Long Observation
 This is a Short Observation

LESSON OBJECTIVE:
 Note the Objective of the Lesson:

Following is the:

- Teacher facing forms which explains what is expected towards mastery and what will be measured.
- The coach/admin facing forms for tracking observations.
- The Rubric which is used for training and then observing of instruction.
- A sample scatter plot report generated from multiple observations.
- The Teacher self reflection forms
- The coach/admin report to the teacher post observation

The domains and categories of Charlotte Danielson's Framework for Teaching are ©2007 ASCD and are reprinted with permission for use with this instrument.

PLANNING & PREPARATION

Score: Rating:

INSTRUCTION

Score: Rating:

CLASSROOM ENVIRONMENT

Score: Rating:

PROFESSIONAL RESPONSIBILITIES

Score: Rating:

OVERALL SCORE/RATING

COMMENTS



DOMAIN 1: PLANNING & PREPARATION

<i>Failing (1)</i>	<i>Needs Improvement (2)</i>	<i>Proficient (3)</i>	<i>Distinguished (4)</i>
1-A: Demonstrating Knowledge of Content & Pedagogy			
Teacher makes no attempt to connect new content with scholar knowledge base or theme-based enduring understandings within the wider classical knowledge base	Teacher makes limited attempts to connect new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base	Teacher connects new content with scholar knowledge base and/or theme-based enduring understandings within the wider classical knowledge base	Teacher connects new content with scholar knowledge base, anticipates misconceptions, and makes interdisciplinary connections within the wider classical knowledge base
1-B: Demonstrating Knowledge of Scholars			
Teacher does not use formative assessments or differentiation strategies to guide scholar discovery	Teacher guides scholar discovery with limited formative assessments or differentiation strategies, but they do not reflect an understanding of the readiness or interests of scholars	Teacher guides scholar discovery with formative assessments and/or differentiation strategies that reflect a general understanding of the readiness and/or interests of most scholars	Teacher guides scholar discovery with formative assessments and differentiation strategies that reflect a comprehensive understanding of the readiness and interests of all scholars
1-C: Setting Instructional Outcomes			
Teacher does not provide learning objectives, thematic resources, or activities that reflect scholar readiness	Teacher provides limited learning objectives, thematic resources, or activities that reflect the readiness of some scholars	Teacher provides learning objectives, thematic resources, and/or activities/outcomes paced to reflect the readiness of most scholars	Teacher provides clear learning objectives, age-appropriate thematic resources, and rigorous activities/outcomes paced to reflect the readiness of all scholars
1-D: Demonstrating Knowledge of Resources			
Teacher does not provide resources that support the theme or cultivate <i>Habits of the Heart and Mind</i>	Teacher provides limited resources from the wider classical knowledge base that support the theme, promote critical thinking, or cultivate <i>Habits of the Heart and Mind</i>	Teacher provides resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and/or <i>Habits of the Heart and Mind</i>	Teacher provides extensive resources from multiple sources within the wider classical knowledge base that support the theme, promote critical thinking, and cultivate <i>Habits of the Heart and Mind</i>
1-E: Designing Coherent Instruction			
Teacher does not design learning activities/outcomes for scholars to make connections with themes, timelines, or enduring understandings of a Classical Education model	Teacher designs learning activities/outcomes that support some scholars in making limited connections with themes, timelines, or enduring understandings of a Classical Education model	Teacher designs learning activities/outcomes that engage most scholars in making purposeful connections with themes, timelines, and/or enduring understandings of a Classical Education model	Teacher designs differentiated learning activities/outcomes that engage all scholars in making their own purposeful connections with themes, timelines, and enduring understandings of a Classical Education model
1-F: Designing Scholar Assessments			
Teacher does not design assessments that guide new learning or provide feedback for scholars	Teacher designs assessments that guide the pace of new learning and/or provide limited feedback for scholars	Teacher designs assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and/or provide feedback for scholars to assess their own goals	Teacher designs authentic assessments that target scholars' developmental/learning style needs, guide the pace of new learning, and provide feedback for scholars to assess their own goals and outcomes



A comprehensive report is generated on each teacher in the school. This details the domain areas of strength and weakness as well as a graphical analysis of areas of success in the classroom.

NAME: Jane Doe - janedoe@sample.com

OBSERVER: John Doe - johndoe@sample.com

WALKTHROUGH DATE: 01/01/2019 12:39 PM EST

PRE-OBSERVATION CONFERENCE NOTES:

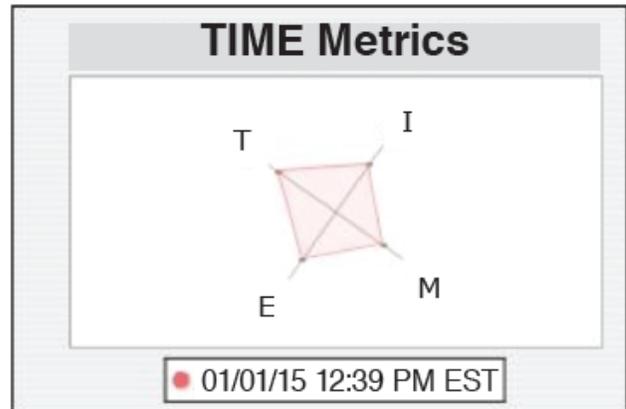
Students were solving a mystery surrounding the play, Macbeth.

DATE OF POST-OBSERVATION CONFERENCE:
01/05/2019

LESSON SUMMARY:

Briefly summarize the lesson observed. What is the discipline/content area? What is the coaching focus? What is the lesson objective?

SWBAT to write a letter offering advice to the next king based on their analysis of the play, Macbeth, and create a movie trailer to entice their peers about the play.



Ethos Logos Performance Level

4.25
Excellence

Classical Learning Level

2.95
Strong

FIRST IMPRESSIONS UPON ENTERING CLASSROOM

WHAT IS THE TEACHER DOING?

- ✓ Standing and delivering content
- Modeling a process/concept
- Facilitating small group instruction
- Conducting a whole group review
- Personalizing a learning episode

Comments:

WHAT ARE THE SCHOLARS DOING?

- ✓ Watching the teacher and/or taking notes
- ✓ Responding orally to teacher-directed questions
- Asking questions and/or seeking clarification
- Conducting a turn-and-talk with other scholar(s)
- Working independently on project/assignment
- Participating in a Socratic seminar

Comments:



WHAT IS THE FEELING/TONE OF THE CLASSROOM?

- ✓ Positive scholar to scholar interactions
- ✓ Positive scholar to teacher interactions
- Productive learning habits are the norm
- ✓ Classroom conducive to learning

Comments:

DOES THE ROOM REFLECT LEMAN CLASSICAL STANDARDS?

- ✓ Timeline
- ✓ Orderly
- Clean
- Professional
- ✓ Caring
- ✓ Citizenship
- Perseverance
- ✓ Respect
- Responsibility
- Trustworthiness

Comments:

IS INSTRUCTIONAL TIME FOCUSED ON THE TASK

- ✓ Yes
- No

Comments:

TEACHER ACTIONS

MANAGEMENT OF CLASSROOM:

- Routines are not defined, lack of respect by scholars to teacher & each other
- Some scholars following expectations, routines are being established
- Most scholars are following expectations, routines are established
- ✓ Commands respect, routines are norms and followed by all
- Tenacious in getting scholars to be self-disciplined, masters really discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

INSTRUCTIONAL PLANNING & DELIVERY:

- Not planned, no observable objectives
- Some planning is evident, objectives are evident but not clear or articulated
- ✓ Well-planned lesson, clear objectives, mixture of good and learning adequate materials
- Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

SCHOLAR ACTIONS

THINKING:

- Scholars are not observed to be thinking or engaged in the learning
- Scholars display knowledge and/or understanding of topic
- ✓ Scholars apply the learning to new and different situations
- Scholars analyze interrelationships, ideas, and themes
- Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

Comments:



ENGAGED LEARNING:

- < 70%
- 71% - 80%
- ✓ 81% - 90%
- 90% - 95%
- 96% - 100%

Comments:

CLASSICAL LEARNING**HUMOR AND FUN:**

- Very little fun and humor observed in classroom
- Humor and fun were observed and contributed to learning environment
- ✓ Fun and humor were consistently used that created a positive learning environment

Comments:

INTEGRATION/CONNECTION TO DISCIPLINES:

- ✓ Only observed subject being taught; no integration with other disciplines
- Integration and connections were attempted involving other disciplines
- Natural connections and integration across subjects were made

Comments:

VIRTUES AND VALUES:

- No virtues or values were mentioned
- ✓ Virtues and values were highlighted but not deeply integrated
- Full integration of virtues and value

Comments:

THE BIG WHY? (PURPOSE/LIFE):

- No purpose was shared
- The Big Why of the topic was mentioned
- ✓ The Big Why and deeper purpose was consistently discussed

Comments:

CHARLOTTE MASON INFLUENCE:

- No influence was observed of C. Mason
- ✓ A few of C. Mason influences were observed and noted
- The teacher implemented numerous C. Mason strategies

Comments:

TEACHER TALK VS. SCHOLAR TALK:

- Teacher talked most of the time
- ✓ There was a balance between teacher talk and scholar talk
- Teacher talked less than the scholars

Comments:



TEACHER ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Management of Classroom

- Routines are not defined, lack of respect by scholars to teacher & each other
- Some scholars following expectations, routines are being established
- Most scholars are following expectations, routines are established
- Commands respect, routines are norms and followed by all
- Tenacious in getting scholars to be self-disciplined, masters reality discipline, poised, dynamic, self-assured, incentives are intrinsically motivated

Comments:

Instructional Planning & Delivery

- Not planned, no observable objectives
- Some planning is evident, objectives are evident but not clear or articulated
- Well-planned lesson, clear objectives, good variety of learning materials
- Purposeful objectives, big ideas, essential questions, themes, and effective learning materials that allow for exploration and discovery
- Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

SCHOLAR ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Thinking

- Scholars are not observed to be thinking or engaged in the learning
- Scholars display knowledge and/or understanding of topic
- Scholars apply the learning to new and different situations
- Scholars analyze interrelationships, ideas, and themes
- Scholars synthesize and evaluate the big ideas, themes, and relationships from the learning

Comments:

Engaged Learning

- < 70%
- 71% - 80%
- 81% - 90%
- 90% - 95%
- 96% - 100%

Comments:

CLASSICAL LEARNING: *Check the HIGHEST LEVEL practice observed only*

Humor and Fun

- Very little fun and humor observed in classroom
- Humor and fun were observed and contributed to learning environment
- Fun and humor were consistently used that created a positive learning environment

Comments:

The Big Why? (Purpose/Life)

- No purpose was shared
- The Big Why of the topic was mentioned
- The Big Why and deeper purpose was consistently discussed

Comments:

Integration/Connection to Disciplines

- Only observed subject being taught; no integration with other disciplines
- Integration and connections were attempted involving other disciplines
- Natural connections and integration across subjects were made

Comments:

Charlotte Mason Influence

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Teacher Talk vs. Scholar Talk

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Comments:



This form is completed during the observation by the PD/Data/Curriculum Director and or the site Administrators. The Coach then compares the teacher self evaluation and has a starting point for the teacher's professional development plan. These observations happen multiple times per year, both as pops ins and as formal reviews. All the coach data is aggregated and compiled so the administration can observe individual and campus wide trends.

OBSERVATION INFO

Teacher Information

Observer Name:

Date:

Time:

School Name:

Teacher Observed:

Pre-Observation Conference Notes:

Date of Post-Observation Conference:

Lesson Summary

Briefly summarize the lesson observed. What is the discipline/ content area? What is the coaching focus? What is the lesson objective?

FIRST IMPRESSIONS UPON ENTERING CLASSROOM: *Check ANY practice observed*

What is the teacher doing?

- Standing and delivering content
- Modeling a process/concept
- Facilitating small group instruction
- Conducting a whole group review
- Personalizing a learning episode

Comments:

What are the scholars doing?

- Watching the teacher and/or taking notes
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- Conducting a turn-and-talk with other scholar(s)
- Working independently on project/assignment
- Participating in a Socratic seminar

Comments:

Is instructional time focused on the task?

- Yes
- No

Comments:

What is the feeling/tone of the classroom?

- Positive scholar to scholar interactions
- Positive scholar to teacher interactions
- Productive learning habits are the norm
- Classroom conducive to learning

Comments:

Does the room reflect Leman Classical Standards?

- Timeline
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- Clean
- Professional
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- Citizenship
- Perseverance
- Respect
- Responsibility
- Trustworthiness

Comments:



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- Objectives highly relevant, hooks all scholars, masterful in connections with real life

Comments:

SCHOLAR ACTIONS: *Check the HIGHEST LEVEL practice observed only*

Thinking

- Scholars are not observed to be thinking or engaged in the learning
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Comments:



Trinitas Classical Academy

Mt Mourne

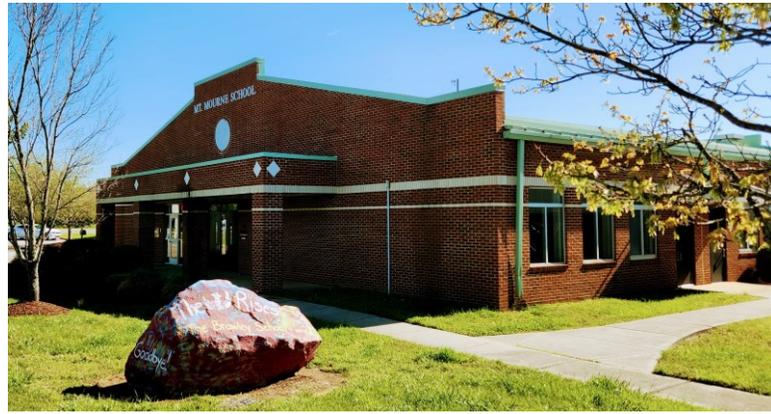


TRINITAS ACADEMY

Classical Education - North Carolina

Classical Education

- Charlotte Mason
- Character Education
- Home School Inclusion



Trinitas Academy

Classical Charter

Kinder To 8th
Grade

Mt Mourne School

12 acre campus
60,000 sq ft base
Playground –
full size gym – fields

Character Education Focus

**Full digital learning
available as a resource**

Homeschool Inclusion

After School

Virtue Based STEM
Tutoring - Explore Partnerships
(Boys and Girls, Girl Scouts etc.)

Every day from 3 to 6
Three class periods
Fun, Sports, Hands on
Value Virtue focus in alignment
with the school
Parent pay or sliding scale

Athletics

Starting in 5th Grade

Boys and Girls
Track
Volleyball
Basketball
Flag Football
Soccer

Opening 2025

K6 year 1
K8 year 3

Dr. Boen Nutting
Principal

Governing Board

- Walter Tribolet
- Clark Mikail
- Susan Tillis
- Will Bowen
- Judge Marcus Long
- Mark Lockman
- Joe Higgins
- Anthony Famiglietti



Mt. Mourne School – A 75 Year Legacy



TUITION FREE
CLASSICAL EDUCATION

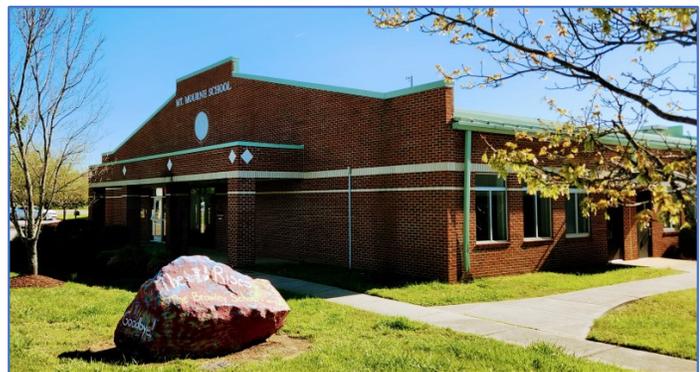
Kinder to 8th
Public Charter School

- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts – Socratic Learning – Athletics
- ⇒ Empowered Teachers

Virtue Safety Athletics Family Connection

*Pending Approval From The State of North Carolina

LEARN MORE AT: TrinitasSchools.org



JOIN OUR INTEREST LIST

Coming Soon
Award Winning
Classical Education – K8
Latin & Logic

SIGN UP  TrinitasSchools.org

 Proposed Location
Mt. Mourne School, Mooresville, NC

We will update you on live and virtual open houses and more.   



K8 Opening August of 2025

1431 Mecklenburg Hwy
Mooresville, NC.



TrinitasSchools.org

JOIN OUR WAITING LIST

Tuition Free

Charter School

Kinder to K8



Mt Mourne 75 Year History



Mrs. Eunice J. Johnston
Teacher - Fourth Grade

MT. MOURNE ELEMENTARY SCHOOL
Mt. Mourne, North Carolina
1964-65

James P. Pines
Principal



School's Mission:

At Trinitas Classical Academy, our mission is to support a **diverse scholar population** a foundation in education to prepare them for the future. Our school focuses on **rigorous academics, character formation, and civic responsibility.**

Our school will **partner with parents** to provide the time-tested Charlotte Mason and Classical Education academic model. We believe in **empowering, equipping, and training our teachers** with tools and support to instill a lifelong love of learning in our scholars.



TUITION FREE
CLASSICAL EDUCATION

Kinder to 8th
Public Charter School

- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts - Socratic Learning - Athletics
- ⇒ Empowered Teachers

Virtue Safety Athletics Family Connection

*Pending Approval From The State of North Carolina

LEARN MORE AT: TrinitasSchools.org

School's Vision:

The vision of Trinitas Academy is to hold our leaders, teachers, and students to the highest level of integrity and accountability. We model what we teach. We embed character development in everything we do. We expect what we model. Our vision statement was formulated by reaching back into history and modeling the great thinkers and leaders on the character attributes that we look to teach and model in our schools:

Courage (Aristotle)

"Courage is the first of human qualities because it is the quality that guarantees the others."

Curiosity (Einstein)

"It is a miracle that curiosity survives formal education."
Curiosity, makes the acquisition of knowledge and wisdom long-lasting.

Humility (Aquinas)

"Where there is humility, there is wisdom"

Gratitude (Cicero)

"Gratitude is the parent of all other virtues – which allows us to seek what is Good, True and Beautiful."

Dignity (Martin Luther King Jr.)

Every man [human being] is an heir to a legacy of dignity and worth.

Justice (Gandhi)

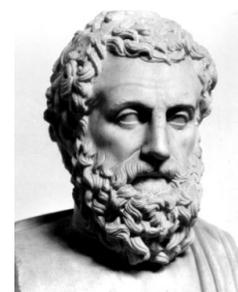
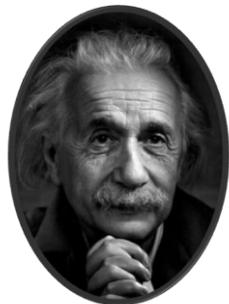
"Truth never damages a cause that is just."

Fortitude (Locke)

"Fortitude is the guard and support of other virtues."

Responsibility (Abraham Lincoln)

"You cannot escape the responsibility of tomorrow by evading it today." What matters is measured.



3

Trivium: Latin term for the meeting place of three roads. Grammar – Logic – Rhetoric

4

Time Periods : Ancient (1st, 5th, 9th), Medieval, (2nd, 6th, 10th) America's Founding (3rd, 7th, 11th) Modern (4th, 8th, 12th)

3

Time Periods : Repeated 3 Times

7

The 7 liberal arts comprise the trivium and quadrivium: a set of 3 core skills, taught first, followed by 4 more advanced subjects. Arithmetic, Geometry, Music (Arts), Astronomy

20

Values and Virtues: Focus on specific virtues that defined Western Thought. Pinnacle – **Truth Beauty Goodness**

What Is Classical Education

What Is Classical Education?

Perfected Over 1100 Years,
Rooted In The Great Works of
Literature, Arts, History, Mathematics and Science,
Classical Education Is A Fit For Families All Over America.



1 Pillars of Classical Ed

Teach Values and Virtues

Through great works of literature, art, music, math and scientific advancements from a historical view.

Natural Education Transitions

The Trivium - Education progression along the child's developmental stages. From Grammar to Logic To Rhetoric.

Interwoven Subjects

Subjects based on a year long, in depth study of a time period in history

Deeper Dives Into Learning

Explore in depth, the Society, Politics, Religions, Intellectual Advancements, Technology, Economics of societies from Ancient to Modern. Socratic Instruction and Source Document Analysis. Much More Than Dates and Facts.

Rigorous Academics

Heavy emphasis on writing, oratory and literature interpretation skills.

Pursuit of the Good, True and Beautiful

2 Pillars of Ethos Logos Program

Partner closely with the Parents. Learning Starts at the Home.
SCHOOL is in ALIGNMENT with the HOME.

Teachers are the Authority in the Classroom.
Careful Hiring, Training and Support of Teachers is our Culture.

Encourage Excellence and not Perfection.

Discipline based on the works of Dr. Rudolf Druikurs, and Adlarian psychologist. Encouragement and relationships are the key to discipline and learning.

Focus on Character Education, Social/Emotional Learning is EQUAL to the Focus on Academics.

Learn from History, Embrace Our Past, Understand Today, Prepare for tomorrow.



What Is Classical Education?

3 Three Stages of Learning The Trivium



Grammar Stage K-3

Heavier on Direct Instruction
Instill WONDER.
Math Facts
Grammar Rules
Recitations of Poetry
Beginning Socratic



Logic Stage 4-6

Scholars Start Asking 'Why?'
Connecting Facts with Ideas
Deeper Dive Into Concepts
Awareness of Others
The Good, True and Beautiful
Heavier Socratic Base



Rhetoric Stage 7-12

Socratic Discussions
Strong Verbal and Writing
Critical Thinking
Linking Past to Today
Capstone Projects
Personal Beliefs Explored

Concentration of the Trivium: Tools of Learning along natural transitions

Grades K-5	Grades 5-8	Grades 8-12
Grammar Foundational Learning Beginning Latin Mathematics Concepts Memorize – Language Rules Oration via Recitation	Grammar	Grammar
	Logic Asking 'Why' Stage Making sense of facts String together concepts Connecting across subjects Written & Oral Skills	Logic
Logic		Rhetoric
Rhetoric	Rhetoric	

Shaded boxes are the dominant, but not exclusive, tools and techniques used for instruction. During each stage, all the subjects are taught (Math, Science, English, History, Fine Arts).



FACT: The Trivium Was Introduced In The Middle Ages
Stages Naturally Progress Along The Child's Development Levels.

What Is Classical Education?

4 History Time Lines Year Long - Thematic Units



Ancient Times 1st - 5th - 9th Grades

Formation of Civilizations
 Egypt - Mesopotamia
 Ancient China - Confucius
 Abraham - Moses
 Babylon - Phoenicians
 Greek Culture
 Aristotle - Plato - Socrates
 Rise and Fall of Rome
 Christianity Starts



Medieval Times 2nd - 6th - 10th Grades

After The Fall of Rome
 Magna Carta
 The Rise of The Church
 Knights and Samurais
 Vikings Norsemen
 Islam Begins
 Ottoman Empire
 Reformation - Martin Luther
 Renaissance - The Masters



America Founding 3rd - 7th - 11th Grades

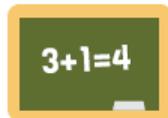
Age of Exploration
 America Colonized
 American Revolution
 Founding Fathers
 Constitution - Bill of Rights
 French Revolution
 Industrial Revolution
 Slavery Injustice
 Civil War Divides The Nation



Modern Times 4th - 8th - 12th Grades

Reconstruction
 Manifest Destiny
 Roaring 20's
 Great Depression
 World War 1 and 2
 Russian Revolution
 Communist China
 Cold War - Space Race
 Vietnam to 9/11

5 Interwoven Disciplines



Art - Music
Big Ideas
Great Literature
Values and Virtues
Great Men and Women

Rise & Fall of Civilizations
Inventions & Inventors
Astronomy
Science Advancements
Bio/Chem/Earth/Physics

Culture of the Day
Major Religions
Governments
Philosophers
Economies

What Is Classical Education?

6 Character Development Values and Virtue Education



Critical Thinking

Equip our Scholars with the Tools to decipher RIGHT from WRONG

CHALLENGE what is Presented with VERBAL and WRITING Proficiency

The Art of DEBATE Using Logical and Reason



Awareness of Others

Through the GREAT BOOKS, Scholars EXAMINE Character Through The Power of Story.

Awareness of Others -
The Golden Rule
The Golden Mean

Appreciation of the GOOD - TRUE - BEAUTIFUL



Life Long Learners

Instill WONDER and a JOY of learning by Making HISTORY come ALIVE.

Spark CURIOSITY
Go DEEPER as opposed to WIDER into Subject Matter.

Hands on Learning in the Arts, Music, Science and Athletics

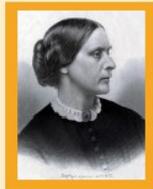
What Is Classical Education?

7 Classically Educated People from History



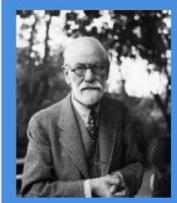
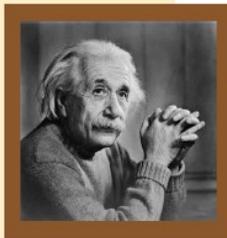
Renaissance

Leonardo daVinci
Copernicus
Martin Luther
Galileo
Christopher Columbus
Isaac Newton
Gutenberg
Shakespeare
Edgar Degas
Montesquieu



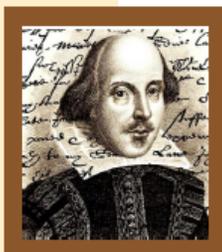
Founders

Samuel Adams
John Adams
James Madison
Thomas Jefferson
Alexander Hamilton
Susan B Anthony



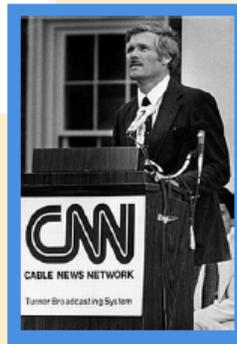
Writers and Thinkers

Fredrick Douglas
J.R.R. Tolkien
JK Rowling
Charles Darwin
Max Planck
C.S. Lewis
Sigmund Freud
W.E.B. Dubois (NAACP)
Nietzsche Voltaire
Emily Dickinson



Moderns Leaders

Albert Einstein
Dr. Martin Luther King
Alfred Hitchcock
Joe Paterno (Penn State)
Ted Turner (CNN)
Vince Lombardi
Pres. Calvin Coolidge
Pres. James Garfield
Pres. William McKinley
Pres. Woodrow Wilson





Admission Protocols and Procedures

Framework for Trinitas Classical Academy Enrollment Process (Pending final Governing Board Approval – In compliance with the most up to date NC DPI directives).

When recruiting students, Trinitas Academy will target all segments of the parent community. Our school will recruit in a manner that does not discriminate against students of a particular race, color, national origin (including English language learners), religion, or sex, or against students with disabilities. Once a student has been admitted to the charter school through an appropriate process, he or she may remain in attendance through subsequent grades. A new applicant for admission to the school, however, would be subject to the lottery if, as of the application closing date, the total number of applicants exceeds the number of spaces available at the school.

Enrollment Timeline and Policy.

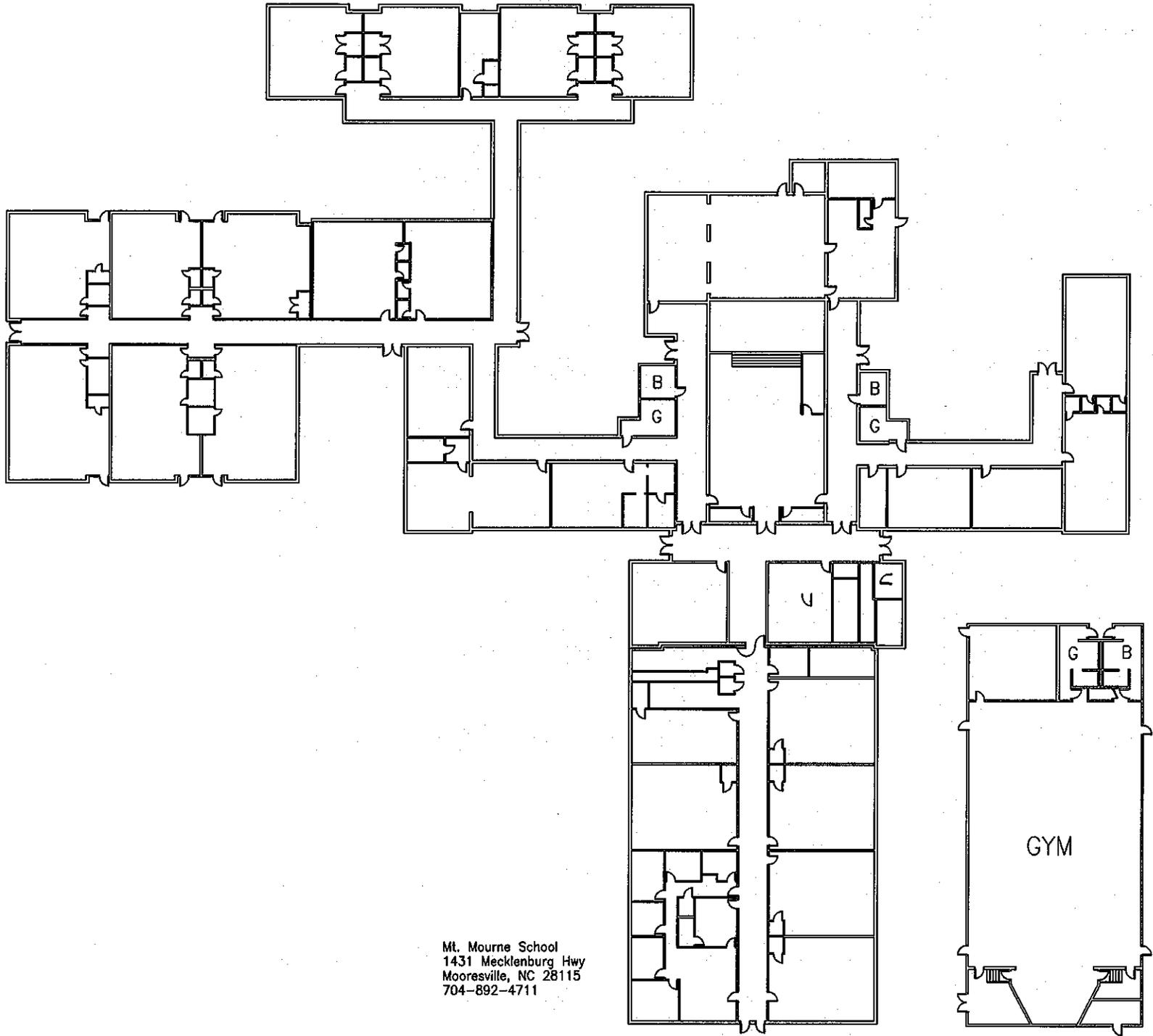
The Trinitas Academy Governing Board will establish its own enrollment timeline based on board adopted policy and in compliance with NC DPI, requirements. Below are the guidelines for application for enrollment to Trinitas Academy:

1. Returning students (students who currently attended the school and intend to return the next school year) are given priority in admission if they notify the school of their intent to return for the next school year by the 2nd Friday of January of each school year.
2. To be eligible for kindergarten, a student must be five (5) years of age prior to September 1 of the year the student starts kindergarten.
3. Students of teachers, staff and Trinitas Governing Board members and siblings of currently enrolled students as well as returning students (that have notified our school that they intend to return) are exempt from the lottery requirements. If there are more of the above described students than spaces available, they will be entered into a separate lottery and either admitted if space allows or placed on the waiting list in the order that they are drawn. **Definition of Sibling:** A “sibling” is defined as an immediate family member of the applicant, or a blended family member of the applicant through marriage or guardianship. Birth certificate, marriage certificate or court documentation is necessary to approve the sibling priority. Does not apply to extended family of sibling unless legal documentation of guardianship is provided. The sibling must be currently enrolled Trinitas Academy. If the sibling withdraws from the academy before applicant is offered enrollment, priority status will be revoked. If the sibling withdraws from the academy before attending at least one day of attendance for the year they are registered, the priority status and any offer/registration of the applicant will be revoked. Priority status does not guarantee placement. Another separate lottery will be held for applicants who do not fall into either of the two abovementioned categories, and who submit applications prior to the deadline. These students will be admitted if there is space or will be placed on the waiting list in the order drawn. For this policy “sibling” shall mean a biological

or legally adopted brother or sister residing in the same household as the applicant. Cousins, nieces, nephews and unrelated children sharing an address with guaranteed enrollment of each listed sibling.

4. As long as the total number of students allowed constitutes only a small percentage of the total enrollment, as permitted by federal guidance on the North Carolina law.
5. Prior to submitting an application for admission parents and students may be encouraged, but not required, to attend an informational meeting about the School. The Trinitas Academy Enrollment package will include: Name of Student, Date of Birth, Name of Parent/Guardian, Address, Contact Information (Phone/Email), Home School District, Current Grade and Grade Level Requested for Admission, Name of Siblings Attending/Applying for Admission.
6. The School shall make clear at meetings and in written information provided along with the application that any student Primary and Secondary districts may apply.
7. Marketing materials will be provided in English and Spanish languages.
8. The School shall begin publicizing the availability of student positions at the School at least two months prior to the date of the lottery. Lottery date is scheduled for a close of April 1st and a drawing for admission on April 10th. (Within 15 days of application close).
9. The lottery will be conducted using lottery selection software under the supervision of the campus Principal or an observer designee. This ensures that the winner list and the waiting list are selected randomly. Results of the lottery shall be certified by a notary public.
10. Parents/Guardians will be notified within 24 hours of the lottery or as a potential seat becomes available. Parents/Guardians will receive a phone call, email, and mailed letter notifying them of their admission. If a student is going to enroll in Trinitas Academy, the student's parent or guardian must accept enrollment within 10 school days of receiving notice of admission or the spot can be made available to the next student/family.
11. If more students apply to the our school than can be accommodated, the school will allocate spaces through a lottery process or fill available positions in the order in which applications were received before the application deadline using notice to the public as provided as required by statute. When the number of applicants exceeds the number of spaces available, students shall be selected by a random lottery, taking into consideration the enrollment preferences outlined in this policy (siblings etc). If additional spaces become available after the initial selection, students shall be offered admission based on their order on the waiting list. Any spaces available after all students on the waiting list have been offered admission shall be filled on a first-come, first-served basis. Waiting lists are not maintained from year to year: students on the waiting list who are not offered admission and wish to be considered for admission the following year must submit a new application and repeat the lottery process if necessary.
12. The lottery shall be held no earlier than April 10th of the year prior to start of school for that lottery being held. Our target open date for the lottery is January 1 of each year.
13. All forms will be provided in English and Spanish. The following documents are requested upon offering admission to the school:
 - a. Certified copy of the child's birth certificate
 - b. Current Immunization Record
 - c. Social Security Card for the child (if available)
 - d. Photo ID of Parent or Guardian
 - e. Proof of Residency (Current Utility Bill, Lease Agreement)
 - i. Property deed

- ii. Mortgage documents
 - iii. Property tax bill
 - iv. Rental agreement or lease (including Section 8 agreement)
 - v. Utility bill (water, electric, gas, cable, phone)
 - vi. W-2 wage statement Payroll stub
 - vii. Other documentation from a state, tribal, or federal agency (Social Security Administration, Veterans' Administration, NC Department of Economic Security, etc.)
- f. Proof of Income (Tax Return, Current Paystubs, Letter of Employer, etc.), if applying on the basis of being economically disadvantaged for lunch.
 - g. Court Documentation or letter from Child Protective Services (CPS) establishing foster care, if applying on the basis of conservatorship
14. Based on space availability, the School shall continue to accept students from its waiting list or, if the waiting list is exhausted, from parents submitting applications after the deadline for the lottery up until January 1. The School may accept students after October 1 at its discretion following the schools administrative transfer and enrollment process.
15. A charter school's admissions policy may not discriminate against students on the basis of sex, national origin, ethnicity, religion, disability, academic, artistic, or athletic ability or the district the child would otherwise attend. Trinitas Academy does not discriminate on the basis of actual or perceived race, color, religion, national origin, sex, age, disability, gender identity or expression, or any other classification protected by law in any of its business activities, including its educational programs and activities which comply fully with the requirements of state and federal law and Title IX. In the event of a possible discrimination, the Trinitas Academy Principal will be the point of contact for any claim.
16. The School reserves the right to exclude from admission a student with a documented history of a criminal offense, a juvenile court adjudication.
17. If space is available, an eligible student must be admitted and enrolled on any day at any time of the day and must be counted as and considered a student immediately.



Mt. Mourne School
1431 Mecklenburg Hwy
 Mooresville, NC 28115
704-892-4711

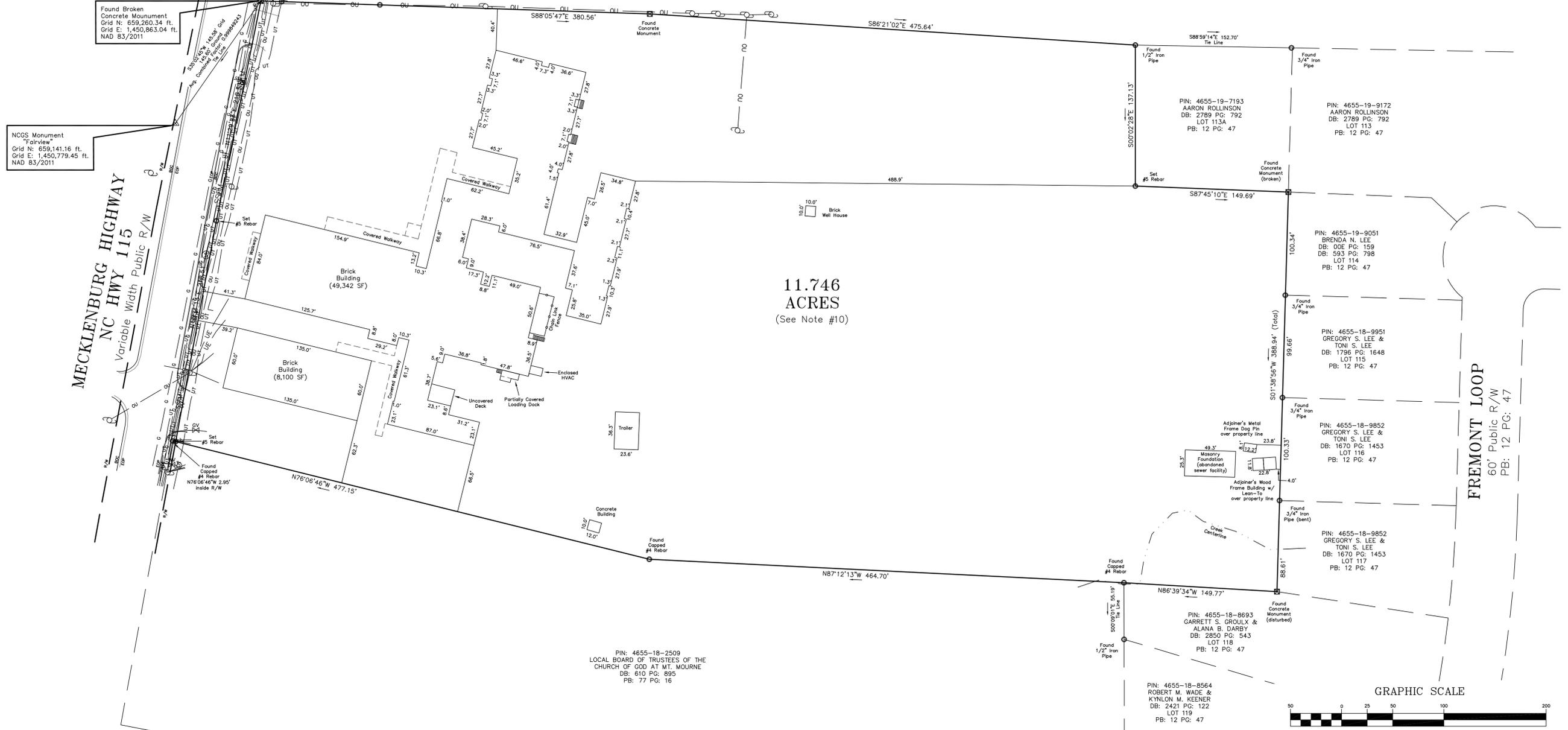
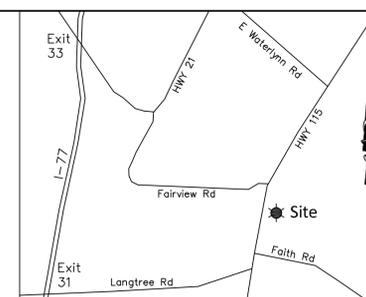
I, JIMMY N. FAIRES, CERTIFY THAT THIS PLAT WAS DRAWN UNDER MY SUPERVISION FROM AN ACTUAL SURVEY MADE UNDER MY SUPERVISION; DEED DESCRIPTION AND/OR MAP BOOK, SEE PAGE, NOTE #2, THAT THE BOUNDARIES NOT SURVEYED ARE CLEARLY INDICATED AS DRAWN FROM INFORMATION FOUND IN BOOK, N/A, PAGE, N/A, THAT THE RATIO OF PRECISION AS CALCULATED IS 1:10,000+; THAT THIS PLAT WAS PREPARED IN ACCORDANCE WITH THE STANDARDS OF PRACTICE FOR LAND SURVEYING IN NORTH CAROLINA (21 NCAC 56.1600). WITNESS MY ORIGINAL SIGNATURE, REGISTRATION NUMBER AND SEAL THIS _____ DAY OF _____, 2022.

PRELIMINARY
 JIMMY N. FAIRES, PLS
 LICENSE NUMBER: L-4311

**PRELIMINARY PLAN
 NOT FOR RECORDATION
 CONVEYANCES
 AND/OR SALES**

PIN: 4655-19-6394
 STATION 115
 DB: 2565 PG: 291
 DB: 2407 PG: 1434
 PB: 64 PG: 85

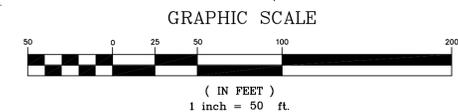
- LEGEND**
- R/W = RIGHT-OF-WAY
 - EOP = EDGE-OF-PAVEMENT
 - BOC = BACK-OF-CURB
 - UT = UTILITY POLE
 - SSM = SANITARY SEWER MANHOLE
 - WV = WATER VALVE
 - WM = WATER METER
 - FH = FIRE HYDRANT
 - GV = GAS VALVE
 - FMV = FORCE MAIN VALVE
 - UE = UNDERGROUND ELECTRIC
 - UC = UNDERGROUND COMMUNICATION
 - G = GAS LINE
 - W = WATER LINE
 - OU = OVERHEAD UTILITY
 - SFM = SANITARY SEWER FORCE MAIN



**11.746
 ACRES**
 (See Note #10)

**MECKLENBURG HIGHWAY
 NC HWY 115**
 Variable Width Public R/W

FREMONT LOOP
 60' Public R/W
 PB: 12 PG: 47



- SURVEYOR NOTES**
- ALL DIMENSIONS SHOWN ARE IN US SURVEY FEET AND DECIMALS THEREOF AND ARE HORIZONTAL GROUND DISTANCES UNLESS OTHERWISE INDICATED. AREA BY COORDINATE METHOD.
 - THIS SURVEY IS BASED ON DEED BOOK 293 PAGE 353, DEED BOOK 1077 PAGE 488 AND PLAT BOOK 5 PAGE 13 AS RECORDED AT THE IREDELL COUNTY REGISTER OF DEEDS.
 - THIS SURVEY WAS PREPARED WITHOUT THE BENEFIT OF A TITLE EXAMINATION BY AN ATTORNEY. THE PROPERTY MAY BE SUBJECT TO UNRECORDED RIGHTS-OF-WAY, EASEMENTS, RESTRICTIVE COVENANTS OR CONDITIONS NOT OBSERVED OR SHOWN HEREON.
 - BASIS OF BEARINGS: NORTH CAROLINA STATE PLANE COORDINATE SYSTEM, NAD 83/2011
 - COORDINATE VALUES AS SHOWN HEREON ARE ILLUSTRATED AS GRID US SURVEY FEET UNLESS OTHERWISE NOTED AND BASED ON THE NORTH CAROLINA STATE PLANE COORDINATE SYSTEM NAD 83/2011. THE AVERAGE COMBINED FACTOR USED FOR THE PROJECT WAS 0.999849243. COORDINATE VALUES FOR NCGS MONUMENT "FAIRVIEW" ARE AS POSTED.
 - ALL CORNERS "FOUND" OR "SET" ARE FLUSH WITH THE GROUND, UNLESS OTHERWISE NOTED. POINTS NOT LABELED "FOUND" OR "SET" ARE COMPUTED POINTS.
 - THE LOCATION OF UTILITIES AS SHOWN HEREON, WHETHER PUBLIC OR PRIVATE, ARE BASED ON THE LOCATION OF VISIBLE ABOVE GROUND APPURTENANCES ONLY. OTHER UTILITIES WHICH WERE NOT OBSERVED AND NOT SHOWN HEREON MAY EXIST. IT IS THE OWNERS/TENANTS RESPONSIBILITY TO VERIFY THE LOCATION PRIOR TO COMMENCEMENT OF ANY CONSTRUCTION. GEOMATIC CONCEPTS, PLLC CANNOT ASSUME RESPONSIBILITY FOR MISIDENTIFICATION OR OMISSION OF UNDERGROUND UTILITIES.
 - THIS SURVEY IS OF AN EXISTING PARCEL OR PARCELS OF LAND AND DOES NOT CREATE A NEW STREET OR CHANGE AN EXISTING STREET.
 - THIS PROPERTY LIES IN FLOOD ZONE "X" AS SHOWN ON FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA) FLOOD INSURANCE RATE MAP (FIRM) COMMUNITY PANEL 37104655001, WITH AN EFFECTIVE DATE OF MARCH 18, 2008.
 - IMPROVEMENTS EXIST WITHIN THIS PROPERTY, BUT NO INTERIOR IMPROVEMENTS WERE LOCATED, AS REQUESTED BY THE CLIENT.

- PIN: 4655-18-2509
 LOCAL BOARD OF TRUSTEES OF THE
 CHURCH OF GOD AT MT. MOURNE
 DB: 610 PG: 895
 PB: 77 PG: 16
- PIN: 4655-18-8564
 ROBERT M. WADE &
 KYLON M. KEENER
 DB: 2421 PG: 122
 LOT 119
 PB: 12 PG: 47
- PIN: 4655-18-8593
 GARRETT S. GROULX &
 ALANA B. DARBY
 DB: 2850 PG: 543
 LOT 118
 PB: 12 PG: 47
- PIN: 4655-18-8444
 MELANIE J. NORDMAN
 DB: 2911 PG: 1604
 LOT 120
 PB: 12 PG: 47
- PIN: 4655-18-9051
 BRENDA N. LEE
 DB: DOE PG: 159
 DB: 593 PG: 798
 LOT 114
 PB: 12 PG: 47
- PIN: 4655-18-9951
 GREGORY S. LEE &
 TONI S. LEE
 DB: 1796 PG: 1648
 LOT 115
 PB: 12 PG: 47
- PIN: 4655-18-9852
 GREGORY S. LEE &
 TONI S. LEE
 DB: 1670 PG: 1453
 LOT 116
 PB: 12 PG: 47
- PIN: 4655-18-9852
 GREGORY S. LEE &
 TONI S. LEE
 DB: 1670 PG: 1453
 LOT 117
 PB: 12 PG: 47
- PIN: 4655-19-7193
 AARON ROLLINSON
 DB: 2789 PG: 792
 LOT 113A
 PB: 12 PG: 47
- PIN: 4655-19-9172
 AARON ROLLINSON
 DB: 2789 PG: 792
 LOT 113
 PB: 12 PG: 47

**BOUNDARY SURVEY
 MT. MOURNE SCHOOL**

1431 MECKLENBURG HWY MOORESVILLE
 DAVIDSON TOWNSHIP, IREDELL COUNTY, NORTH CAROLINA

Prepared For: THE LANGTREE GROUP 331 ALCOVE RD SUITE 300 MOORESVILLE, NC 28117	Owner: IREDELL-STATESVILLE SCHOOLS 549 N. RACE STREET STATESVILLE, NC 28677
---	--

GEOMATIC CONCEPTS, PLLC
 NC LICENSE #: P-1031
 470 NORTH BROAD STREET, SUITE A, MOORESVILLE, NC 28115
 PHONE: 704-664-1994 EMAIL: JIMMY.FAIRES@GEOMATICCONCEPTS.COM

Drawn By: JTU	Checked By: JNF	Scale 1" = 50'	Project No. 22073
Date: November 17, 2022	File: 22073-Mt-Mourne-School-12-Acres.dwg		Sheet No. 1 of 1

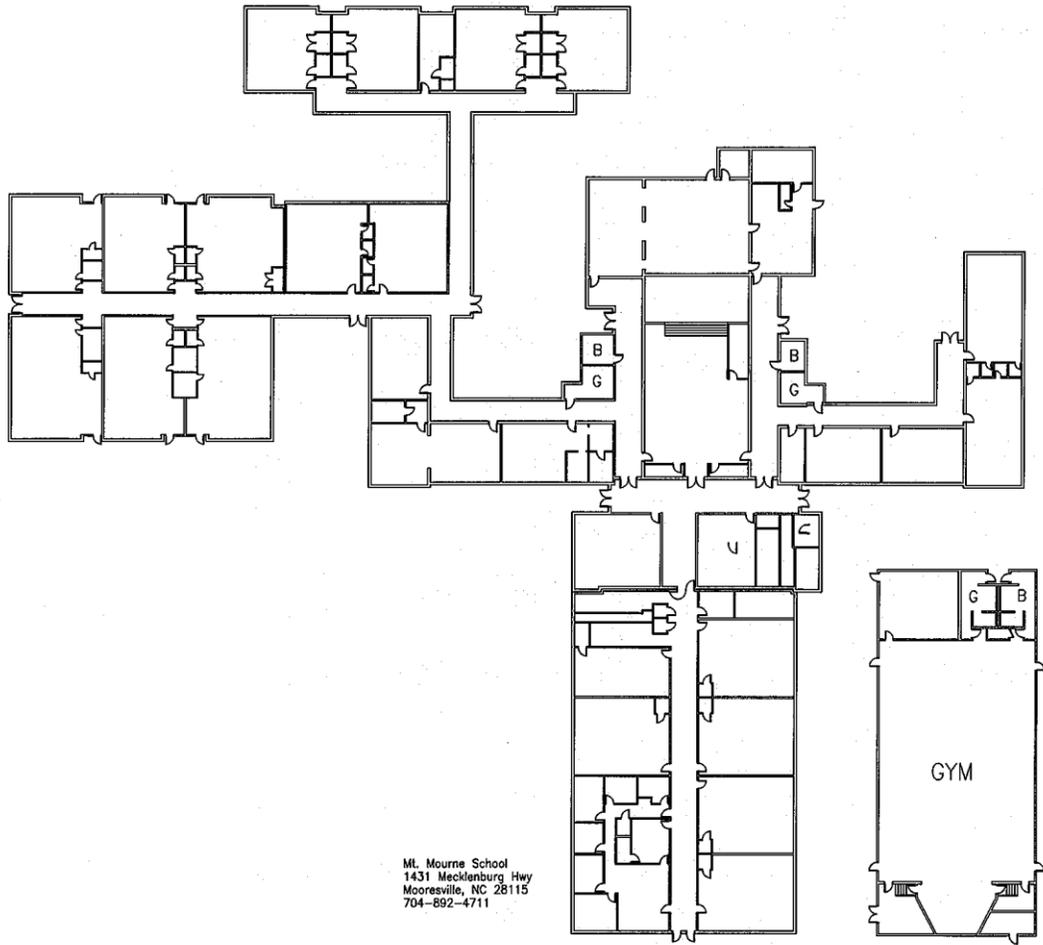


Mt Mourne School

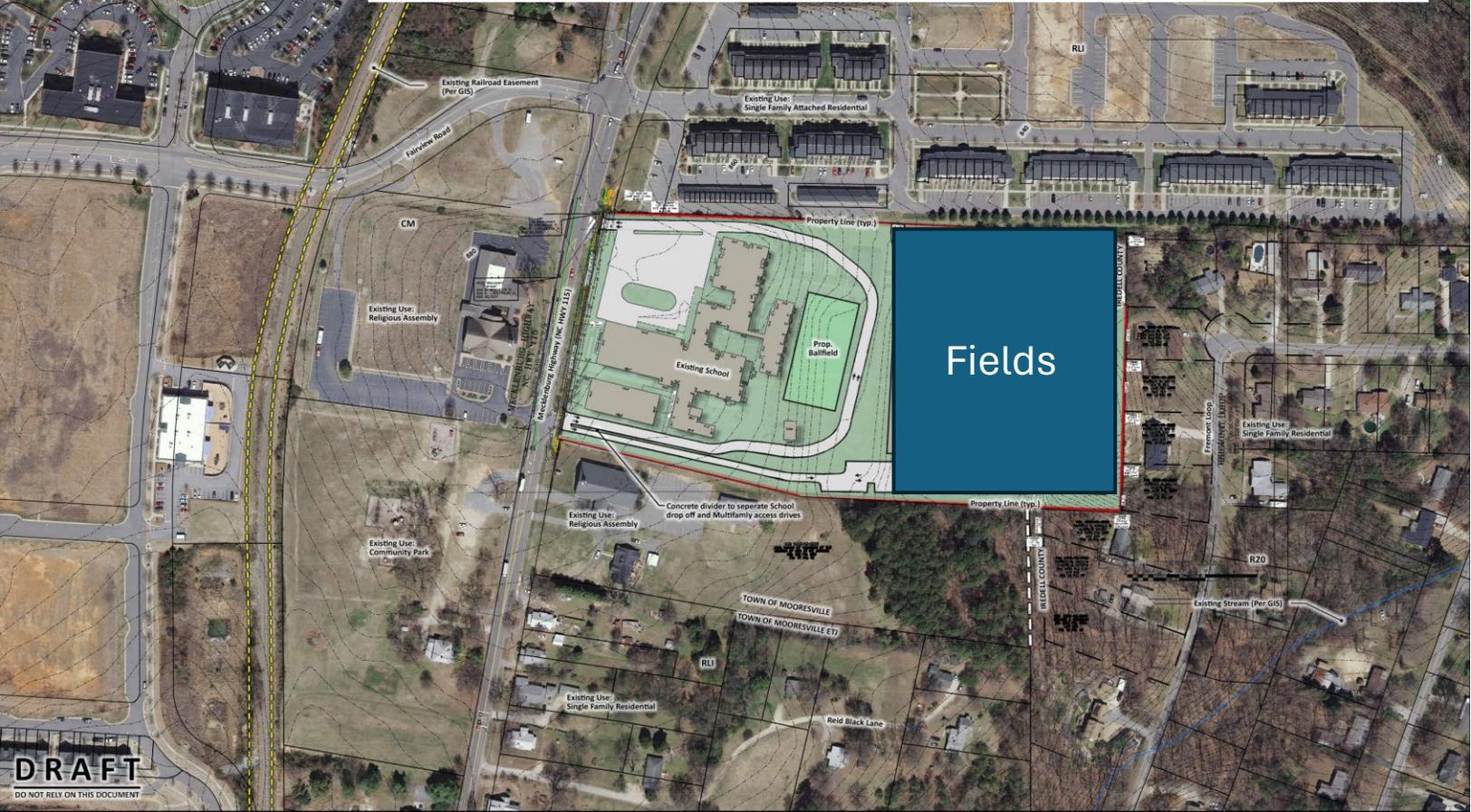


TRINITAS ACADEMY
Classical Education - North Carolina





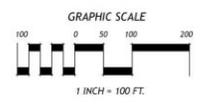
Mt. Mourne School
 1431 Mecklenburg Hwy
 Mooresville, NC 28115
 704-892-4711



DRAFT
 DO NOT RELY ON THIS DOCUMENT



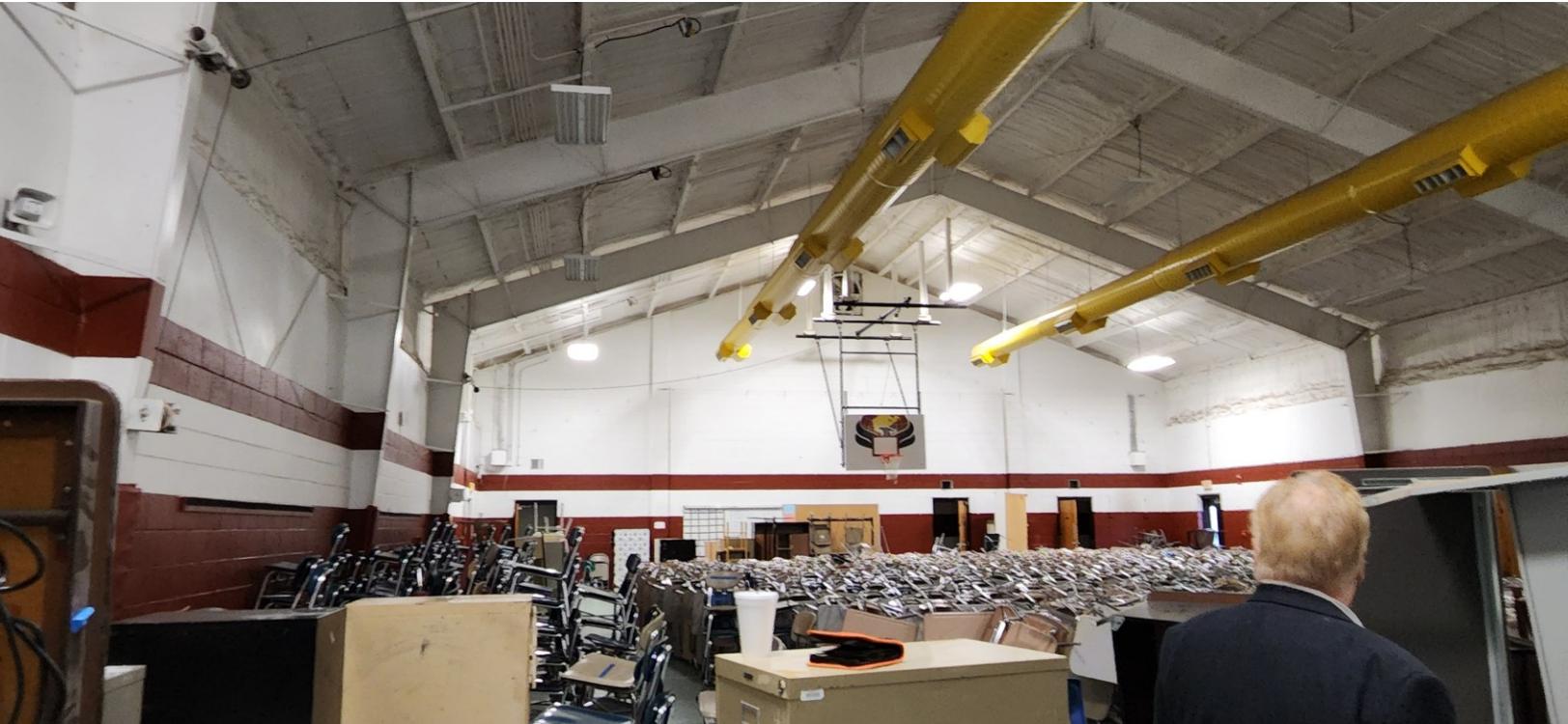
Mt. Mourne School Site
Preliminary Concept C



GYM



TRINITAS ACADEMY
Classical Education - North Carolina





Functioning Classrooms



TRINITAS ACADEMY
Classical Education - North Carolina







TRINITAS ACADEMY
Classical Education - North Carolina



April 1, 2024

North Carolina Charter School Board
301 N. Wilmington Street
Raleigh, NC 27601-2825

Re: Commitment of Start-Up Funds to Trinitas Academy

The **Renee McGuire Foundation** board of trustees is pleased to pledge a one-time grant of up to **\$100,000.00** to Trinitas Academy – North Carolina to meet the needs of their 2025-26 start-up year. We understand that this grant is part of their overall funding package, and we may be one of many foundations or organizations supporting their schools launch.

Relevant grant restrictions and contingencies are:

- 1) Trinitas Classical Academy, must maintain its 501c3 status;
- 2) Trinitas Classical Academy must receive charter as awarded by the State of North Carolina;
- 3) Funds will be distributed in either 2024 or 2025, at the discretion of the Foundation; and
- 4) Funds may not be used for any political campaign purposes, to carry on propaganda or otherwise attempt to influence in any manner legislation of any governmental body, to influence the outcome of any public election, to carry on directly or indirectly, any voter registration drive, or to make any payment or use of grant funds for any purpose other than charitable purposes described in section 170(c)(2)(B).
- 5) Trinitas Classical Academy maintains their stated focus on character education as an integral component of their instructional model.

Thank you for your consideration of Titus Academy of Texas. We expect it to be a valuable educational option for San Antonio families.

Sincerely,

Renee McGuire Foundation
Chair & Trustee

Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third-party contracts with individuals or companies.

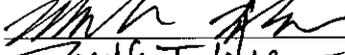
- ❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.

- Name of the Selected Board Attorney: Kevin Donaldson PLC
 - Jones Childers Donaldson and Webb
- Date of Review: April 1, 2024
- Signature of Board Members Present (Add Signature Lines as Needed):

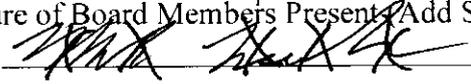
- 
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- _____
- _____
- _____

- ❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.

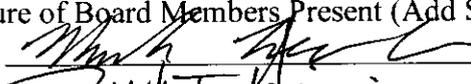
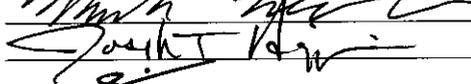
- Name of the Selected Board Auditor: Sharp Patel CPA
- Date of Review: April 1, 2024
- Signature of Board Members Present (Add Signature Lines as Needed):

- 
- 
- _____
- _____
- _____



- ❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.
 - Name of the Contact for Selected EMO/CMO: Not Applicable
 - Date of Review: NA
 - Signature of Board Members Present (Add Signature Lines as Needed):
 - 
 - _____
 - _____
 - _____

- ❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.
 - Name of the Contact: None selected
 - Name of the Selected Financial Service Provider:
 - Date of Review: NA
 - Signature of Board Members Present (Add Signature Lines as Needed):
 - 
 - 
 - _____
 - _____

- ❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.
 - Name of the Contact: Powerschool
 - Name of the Selected PowerSchool Service Provider: Powerschool Direct
 - Date of Review: 4-1-2024
 - Signature of Board Members Present (Add Signature Lines as Needed):
 - 
 - 
 - _____
 - _____

Certification

I, Mark Lockman, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Trinitas Classical Academy Charter School is true and correct in every respect.

Signature 

Date: 4-1-2024

WILL BOWEN

Mooresville, NC | 252.432.0407 | james.william.bowen@gmail.com | linkedin.com/in/willbowen

OVERVIEW

- Support implementation of media, public relations, and communications strategies for Congressman McHenry
 - Identify key district issues and advise the Congressman on priority matters
 - Orchestrated constituent education and advocacy on key small business components of the 2020 CARES Act, including the Paycheck Protection Program (PPP) and Economic Injury Disaster Loan (EIDL) Program
 - Successfully managed the Congressman's 2020 primary & general election campaigns in the dramatically altered Tenth Congressional District following court mandated redistricting
 - Managed Congressman McHenry's winning bid for re-election over a crowded primary field and general election opponent in the "Blue Moon" 2018 election cycle
-

EXPERIENCE

U.S. House of Representatives, Tenth District of North Carolina

Press Secretary, Congressman Patrick McHenry, April 2023 – Present

- Draft press releases, talking points, speeches, op-eds, newsletters, social media, and other written materials
- Manage and evaluate incoming press requests to achieve optimal messaging
- Cultivate and maintain relationships with district and national media
- Manage logistics of in-person and virtual press opportunities and other public-facing events

Regional Director, Congressman Patrick McHenry, January 2021 – March 2023

- Served as main constituent liaison for Cleveland, Iredell, and Lincoln Counties
- Created partnerships with district civic leaders, government employees, and elected officials
- Represented or accompanied the Congressman at civic and governmental events, meetings, and celebrations
- Managed constituent casework portfolio with emphasis on Small Business Administration (SBA) and U.S. Department of Agriculture (USDA) concerns

Regional Representative, Congressman Patrick McHenry, January 2019 - December 2020

- Served as the main constituent liaison for Cleveland and Lincoln Counties
- Managed constituent casework portfolio consisting of Small Business Administration (SBA), Office of Personnel Management (OPM), U.S. Department of Agriculture (USDA), U.S. Department of Housing & Urban Development (HUD), and Department of Veterans Affairs (DVA)
- Supervised participation in the Congressional Art Competition and Congressional App Challenge
- Oversaw Congressional internships in the Gastonia District Office

McHenry For Congress

Campaign Manager, January 2017 – May 2021

- Collaborated with general consultant and senior staff to develop campaign strategy
- Designed and executed grassroots campaign strategy
- Recruited and managed volunteers and field staff for door knocking, call banking, and sign blitzing
- Drafted campaign communications including social media copy, press releases, and donor solicitations

Deputy Campaign Manager, August 2016 – December 2016

- Partnered with Campaign Manager and Finance Director during Congressman's successful bid for re-election
- Planned and executed fundraising events and donor maintenance
- Directed volunteer efforts in call banking, sign blitzing, and poll working
- Served as a surrogate for the Congressman at local party events and candidate forums

EDUCATION

University of North Carolina at Charlotte
Charlotte, NC
Bachelor of Arts, Political Science

Vance-Granville Community College
Henderson, NC
Associate Degree, Arts

Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information

Name of charter school

Trinitas Classical Academy

Board Member's Information

Board Members

Full name: Susan Tillis

Home Address: 16116 North Point Road, Huntersville, NC 28078

Business Name & Address:

Telephone No.: 704-999-2889

E-mail address: Tillis.susan@gmail.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?

No:

Yes:

Educational History

Bachelor of Science, Marketing Management, Bentley College, 1985

Employment History

Allen Tate Realtors, Cornelius, NC: Broker/Realtor/Sales Manager
2005-2016
Allen Tate Realtors, Davidson, NC: Broker In Charge/Branch Leader
2016-to present

How were you recruited to join this Board of Directors?

I learned about a new charter school that may open up and inquired about it and after a few discussions about the school and its philosophy, I was asked to join the board.

Why do you wish to serve on the board of the proposed charter school?

moved to the area in 1998 with 2 young children and having the right schools, school choice was very important to me. The need for schools is still very important to me as both a real estate professional as well as a grandmother. The area continues to grow and prosper and with that the

	need for good quality schools is even more important. It is my hope that I continue to show support to the community by serving on the board.
How were you recruited to join this Board of Directors?	Same question?
Why do you wish to serve on the board of the proposed charter school?	I hope to be a resource for the school in both time and talent in the community and within the school. We will provide oversight to leadership and the administration and hold them accountable.
What is your understanding of the appropriate role of a public charter school board member?	Our role as a board member is advisory, support to the school leadership and financial oversight.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I have had the opportunity to serve on a variety of boards and non-profits including our local United Way board, homeowner associations as well as on the board of our local high schools PTA. I founded and currently the chair of a non-profit that provides support for our junior enlisted at Fort Bragg.
Describe the specific knowledge and experience that you would bring to the board.	I have been involved and lived in this community since 1998 and with that comes a history of service and involvement. Secondly, being a Real estate professional since 2005 will also help because I understand the needs of our buyers and sellers and what is important to them. Whether it was helping with T-Ball, PTA or other events, I will be able to bring a perspective that will help our school grow and prosper.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	Our mission is to support a diverse scholar population by providing them a foundation in education that will help prepare students for the future. The focus of our school will be on a rigorous academic program, character formation and also civic responsibility.
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<p>What is your understanding of the school's proposed educational program?</p>	<p>Classical Education focuses on a well-rounded education, including arts, music, and Latin, as well as Math, English, and the Sciences. Classical education looks to create deep thinkers and lifelong learners. Our Classical School will focus intently on Character Education and Civic instruction, with the aim of building strong leaders in families, business, policy the sciences, and the military.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>Parents and the community are an important factor in the success of the school. By partnering with the parents and kids, as wells as being involved in the community I hope that we can provide a place for children that teaches them and engages them to be educated, productive citizens.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<ul style="list-style-type: none"> a. Enrollment is strong b. Financial stability c. Hired teachers who love their profession, and it shows in everything they do. d. To be one of the top schools in the region.

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<ul style="list-style-type: none"> a. Showing support in our community b. Being a resource to the school with my time and talent c. Holding the school leadership accountable d. Support and oversight of the school operations.
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>Having a strong principal who aligns with our mission as well as being fully staffed.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>We will be successful at the end of five years by meeting our financial and academic goals.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>It starts with hiring. We need to hire the best administrative staff, teachers and principals.</p>

How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

If there was something unethical happening on the board, then I would report it to the chair or the next in line if the chair is the issue. It's also possible that a board discussion should also happen.

Certification

I, Susan Tullis, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for _____ Charter School is true and correct in every respect.

Board Member's Signature

Signature Susan Tullis

Date 4-10-24

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. Click or tap here to enter text.*

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board must submit a completed background check that meets the following parameters:

- 1) Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) Background check must include any additional aliases that have been used by the individual.
- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Susan Tellez, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature Susan Tellez Date 4-10-24

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

Anthony N. Famiglietti

PO Box 2254 * Davidson, NC 28036 * C: 917.370.3653

Runfam@gmail.com

OBJECTIVE Assist the establishment and advancement of Trinitas Academy through active board membership

SKILLS

- Two-Time Olympian and Six-Time US Champion in the sport of track and field and professional road racing
- Sixteen years of experience as a professional runner, persona and brand ambassador in professional athletics
- Renowned motivational speaker with special emphasis in actively assisting others in reaching their goals
- Positive leadership skills with the ability to effectively direct and motivate individuals and teams toward goal setting and accomplishing high level achievements under pressure
- Deeply compassionate and empathetic with a caring and kind presence.
- Driven to better understand the human experience and utilize that understanding to effectuate positive change in others

EDUCATION

University of Tennessee, Knoxville

BA Psychology, Graduation: 2001

WORK EXPERIENCE

Reckless Running LLC, Davidson, NC www.recklessrunning.com Instagram: @recklessrunning

Co-Owner/Brand Ambassador, 2008-Present

- Conceived and launched a professional coaching service / running apparel label
- Coached several athletes to 25+ individual State Championship titles 2013-present
- Oversee all aspects of performance, workout plans, strategy, periodization, nutrition, motivation
- Generate press in major industry publications; Competitor Magazine, Runner's World and Running Times
- Utilize social media to promote the brand regionally and internationally
- Media Appearances and overall positive branding via promotion and monthly competitive racing

Adidas AG Herzogenaurach, Germany | Skechers Performance Manhattan Beach, California

Sponsored Athlete/Brand Ambassador 2000-2008 & Skechers Performance 2019-2021

- Performance branding via athletic achievement at the highest Olympic level
- Generated positive media & press in print publications on national television/radio and online hotspots
- Consulting on product development, hands on creation of racing sneakers and wear testing feedback
- Promotional and motivational public appearances including speaking engagements and autograph signings

Professional Runner

June 2000-Present day

- Olympic Finalist and member of the 2008 Olympic Team Beijing China
- Member 2005 World Championship Team Helsinki, Finland
- Member 2004 Olympic Team Athens, Greece
- 2003 Pan Am Games Bronze medalist
- Member 2001 World Championship Team Alberta, Canada
- 2001 World University Games Champion, Beijing China
- US Champion 5k, 8k, 15k, Steeplechase – 7 x US Champion Runner-up
- Three-Time NCAA All-American
- Team Leader/Captain two years University of Tennessee
- Scholar-athlete Award winner Southeastern Conference
- Scholar-athlete honor roll
- Three-Time Southern Conference Champion

Charter School Board Member Background Check Form

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- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Anthony Famiglietti, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature  Date 4/10/24

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____



Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information

Name of charter school	Trinitas Classical Academy
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Board Member's Information

Board Members	Full name: Anthony Nicholas Famiglietti
	Home Address: 109 Alexandria Drive Mooresville, NC 28115
	Business Name & Address:
	Telephone No.: 917-370-3653
	E-mail address: runfam@protonmail.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?

No:

Yes:

Educational History

BA Psychology University of Tennessee, Knoxville. Previous minor study in education and fine art with volunteer work and on-site study at the elementary level in Montessori school environments. I became a professional athlete one year prior to graduating university and chose to pursue the path of personal growth through competitive, elite racing as a two-time Olympic track athlete in lieu of a graduate degree.

Employment History

I currently co-own and operate a personal coaching program at Reckless Running LLC which has helped countless youth athletes find their highest potential and calling. Within the last ten years we've watched with joy as many of our athletes have gone on to achieve great success at the Division I collegiate level as well as excel in Ivy League settings and in officer programs within the U.S Military. We make concerted efforts to not only focus on elite performance, as we also strive to introduce many young adults who are beginner level athletes to our unique methods and practices. We emphasize goal setting, constructive self-discipline and positive perseverance to help our clients identify and aim to reach their true potential.

<p>How were you recruited to join this Board of Directors?</p>	<p>I have coached in the area for a number of years and was referred to the group because the classical model features a full student experience. My background in the arts and athletics are a great fit for the school we are looking to open.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I have worked in the greater Charlotte area as a coach and mentor for many years. All of our clients are recommended solely through word of mouth. Our reputation has grown quickly through the success we've achieved assisting others in the community, and as such we have been able to assist some of the current prospective board members who now wished to see us extend our experience and understanding to many others by way of this opportunity.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I have coached in the area for a number of years and was referred to the group because the classical model features a full student experience. My background in the arts and athletics are a great fit for the school we are looking to open.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>In brief, the role in its entirety is a position of dedicated service meant to actualize our diverse range of experience and understanding in order to embolden and enlighten our growing community. I'm a father and I spend a lot of time with young people and I see a need to build something that focuses on academics but life skills as well.</p>
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>Our role, as I understand it, is to work at letting the community know about the school and once open, oversee operation and work through the Principal.</p>
<p>Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.</p>	<p>I've served as a leader and front-runner even in my teenage years. I've lead many around me in life to championship success through the hard earned lessons I've learned through personal experience as well as the lifelong tutelage and mentorship of many incredible people, some of whom are experienced masters level social workers. I've been able to lead and inspire many of my contemporaries as an NCAA scholar-athlete award winner, Team Captain, Team MVP, motivational film maker, motivational speaker, writer and brand sponsored athlete for some of the largest corporations in the world. I believe the greatest service one can offer upon achieving great success is to return to the roots of one's home community in an effort to help teach and inspire others on how to walk that same path and raise the standard for everyone as a whole.</p>

<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>I can only offer a deep, hard-earned knowledge that comes through willingly persevering through physical pain, tragedy, trauma and attempting to clear these obstacles in life with ease and grace as a professional long distance hurdler. My life is my message. My work has been to willingly demonstrate how we can all take on life's endless obstacles and pitfalls by competing as a professional steeplechaser and Olympian. My entire psyche and positive outlook has been developed through this unique, metaphorical allegory. At 45 years of age I've reignited the process and have taken on the new task of aiming to set a Master's World Record in the steeplechase this month. My dream is to teach others that assumed limitations, including age, are often self-imposed through miseducation or self-doubt.</p>
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School Mission and Program

<p>What is your understanding of the school's mission and guiding beliefs?</p>	<p>To support and foster diverse scholarship through a rigorous and well-planned program that supports and inspires youth from every background and ability level to be fully prepared for life's journey. The overarching aim being the advancement of a community-wide student body by setting them off on the right foot as they journey towards a bright future of immense success.</p>
<p>What is your understanding of the school's proposed educational program?</p>	<p>It is a very well thought out and rigorous program that offers a diverse array of in-depth subject matter that I personally would have loved to have offered in my own day as a young student. Most importantly, it offers a healthy and positive environment for our unique, local population of students to feel at home in and be fully engaged and intellectually prepared for the future.</p>

What do you believe to be the characteristics of a successful school?	Integrity is always paramount, followed closely by a prudent and dedicated staff who operate with an optimism that engages and inspires a student body to fully participate and fully engage by way of daily positive feedback and motivation.
How will you know that the school is succeeding (or not) in its mission?	The greatest metric of success is direct feedback which is best gauged by being present, taking part as often as possible, and observing and listening in-person. Standard metrics of assessment like testing are also quite helpful, but are most often a great tool for a board to utilize to direct them as to where they can best enliven the student environment more.

Governance

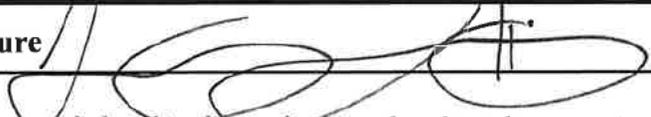
Describe the role that the board will play in the school's operation.	Lending oversight and support as often as possible by utilizing our unique talents and experience.
How will you know if the school is successful at the end of the first year of operation?	Aside from meeting scholastic grade requirements, success is always best judged by assessing direct student and parent feedback as well as teacher feedback.
How will you know at the end of five years of the schools is successful?	I think at the end of five years we are known in the community as a quality school that excels in academics, the arts and education we've done our job. Beyond that, having statistics and data is always a reliable model for gauging success, however success can also be measured in the quality of life of those who've made it through the scholastic program and moved on. Another high resolution metric is in the amount of applicant requests received once many parents have had their children pass through the school and engage the community.

<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>It is always paramount for a board to operate with the utmost integrity and actively apply their invaluable experience and understanding through productive and creative engagement. The world is changing very quickly with the advent of new technologies and scientific advancement. Applying these fantastic, modern tools and informational access points effectively and optimally can afford all students an elevated understanding and public growth beyond what many of us can imagine.</p>
<p>How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?</p>	<p>Personally, I would take immediate action to identify and address any said allegations or evidence as such. From there I'd recommended all information regarding such a matter be brought before all members of the board to consider optimal solutions.</p>

Certification

I, Arthur/Famiglie HJ, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Charter School is true and correct in every respect.

Board Member's Signature

<p>Signature </p>	<p>Date <u>4/9/24</u></p>
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**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. Click or tap here to enter text.*

Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

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As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

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School Information

Name of charter school

Trinitas Classical Academy

Board Member's Information

Board Members

Full name: Marcus H Long Jr.

Home Address: 1954 Brawley School Road, Mooresville, NC 28117

Business Name & Address:

Telephone No.: (540) 577-0775

E-mail address: long.marcus50@gmail.com

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Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/>
Educational History	B.S. Virginia Tech Juris Doctor, T. C. Williams School of Law, University of Richmond
Employment History	Long and Long, Blacksburg, VA – Lawyer 27 th District Juvenile and Domestic Relations Court - Judge 27 th Judicial Circuit Court - Judge
How were you recruited to join this Board of Directors?	Mark Lockman was introduced to me through mutual friends. I am interested in youth issues and the group interviewed me regarding joining the board.
Why do you wish to serve on the board of the proposed charter school?	I have a long history in youth-based services. As a juvenile courts judge, I got to see firsthand how in need our kids are for a school like we are building.

How were you recruited to join this Board of Directors?	See above answer.
Why do you wish to serve on the board of the proposed charter school?	I have been blessed all my life and have raised two beautiful daughters. Each are different and successful. One pursued the arts and is a professional ballerina. The model we are building is similar to what I experienced in school and my daughters learned when they were growing up. Each child has different talents and abilities and I think the classical model exposes kids to a wide range of ideas and experiences. Hopefully I can help other kids and families chart a similar course as my family did.
What is your understanding of the appropriate role of a public charter school board member?	As a non profit board member, I hope to add my ideas and life experiences to the school.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	As a juvenile justice judge, I've worked with drug treatment, family social services, foster care services, drug rehabilitation and much more. My goal was always to stabilize families and try to put them back on the right track. Many of these efforts involves the community coming around the family with services including their schools. I see that my work is a natural step to helping our school address all socio economic groups that we may teach.
Describe the specific knowledge and experience that you would bring to the board.	See above – I am also on the board of Safe Surfing, which looks to protect children from online predators. I've worked with the Iredell School District to bring our program in to their high schools. I would like to be a resources for Safe Surfing in our school as well.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	Our mission to focus on character education and civic education is important to me. We have a real need in our schools to impart these two important ideas onto the next generation.
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What is your understanding of the school's proposed educational program?	The more I learn about the classical education model the more important I think it is for the time and our location. A focus on writing, speaking is so lacking in America today. As a judge and attorney, being able to communicate ideas has made all the difference in my life and I'd like to help kids understand the power of ideas.
What do you believe to be the characteristics of a successful school?	Our school will be a success if we are teaching the great books, ideas and foundations of our country.
How will you know that the school is succeeding (or not) in its mission?	I'm new to school operations so at this point, success to me looks like a good staff and happy parents. I'm looking forward to learning more about how schools judge success.

Governance

Describe the role that the board will play in the school's operation.	On the other non-profit boards I serve on, our goal is to support, set direction, help open doors, and advocate for the non-profit. I'm assuming this board will be similar.
How will you know if the school is successful at the end of the first year of operation?	Strong enrollment and happy students.
How will you know at the end of five years of the schools is successful?	Our school becoming a staple of the Mooresville community.
What specific steps will the charter school board need to take to ensure that the school is successful?	Be present at board meetings, offer help where I can, set a vision for the school.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	Conflict of interest should be addressed openly and with the full boards knowledge and involvement.

Certification

I, Marcus H. Jory, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature <u>Marcus H. Jory</u>	Date <u>4/9/24</u>
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Board Member Background Check

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- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Marcus H. Long, Jr., certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature Marcus H. Long, Jr. Date 4/9/24

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

DR. WALTER C. TRIBOLET

704.763.2467 | walter_tribolet@yahoo.com | [linkedin.com/in/waltertribolet](https://www.linkedin.com/in/waltertribolet) | Cornelius, NC

OPERATIONS EXECUTIVE

Highly qualified Operations Executive who drives high-profitable growth through strong financial acumen, cost-effective operations, and new business opportunities across consumer products and services organizations. Legacy of turning around underperforming multi-industry organizations of all sizes and maturity levels, accelerating sustainable growth with entrepreneurial ingenuity, capitalizing on market opportunities, driving performance improvements and smart investments. Motivated by resolving challenges, repeatedly achieving what “can’t be done” through unparalleled work ethic and determination.

Turning Around Organizations to Maximize Profits:

- Business Development
- Sales Turnarounds
- Negotiations - Dealmaking
- Product Development
- Marketing | Branding
- Sales | Creative Solutions
- Performance | Productivity
- Cost Efficiency | EBITDA
- P&L Oversight | Six Sigma
- Commercial/Industrial Experience
- Entrepreneurship
- Project Management
- Change Management
- Strong Negotiations
- Process Redesign

PROFESSIONAL EXPERIENCE

CEO **2019 – present**
Native Ceuticals *Charlotte, NC, USA*

Created the Native Ceuticals model from scratch after the Farm Bill was signed in 2018, making CBD effectively legal in all 50 states. Created the vision and mission statement for the company with a clear strategy and positioning in the Health & Wellness space. Hired and trained the Management team, created the e-commerce and other revenue streams, negotiated with suppliers, created the retail model incl. merchant processing while being in full control of finances and investments. Currently looking to expand internationally with the main focus being South America and the European Union.

- Model: Created Native Ceuticals from scratch. Model, operations, e-commerce, SOP's etc.
- Seed to shelf: Created seed to shelf model and thus establishing complete control over the supply chain incl. chain of custody.
- Liquidity/Cash Flow: Overseeing cash flow and liquidity calculations of the company with main authority signing off on all major projects
- Licensing: Opened the first location in February 2020 with Currently 37 licensees in 8 States (NC, GA, FL, CT, NJ, NY, MD, TX) with another 13 in the pipeline all while in a pandemic. Forecast has 60 stores by the end of 2023 with 120 by the end of 2024.
- E-commerce: Oversaw and led the creation of the website incl. the integration of an industry leading and patent pending customization project.
- Retail design: Oversaw retail store design, procedures and outfit. Negotiated pricing with suppliers, for example furniture companies.
- Merchant processing: Negotiated merchant processing for the main company and subsequently all licensees.
- Inventory: Implemented inventory control and systems for all Licensees.
- Price Restructure: Negotiated price structure with all suppliers. Set price/margin structure for Licensees.
- Hiring: In charge of hiring the Management team.
- P&L: P&L responsibility - budgeting, forecasting and reporting for all aspects of the company.
- B2B: Implemented the B2B program incl. pricing, structure as well as white and private labeling opportunities.
- Franchise Journal winner: Led Native Ceuticals to Franchise Journal 2020 and 2021 Top Franchises winner.
- Marketing: Oversees all Marketing and PR activities of the company incl. influencer programs, grand openings and national campaigns.
- Other revenue streams: Created subsidies named Native Java and Native Ceuticals Sport to increase revenue streams for the company.
- International expansion: Leads negotiations with groups in Brazil, Ecuador, Peru, UK and Saudi Arabia to sell Master License and/or Distribution licenses for those countries.
- Board of Directors: Leads all meetings with Investors and the Board of Directors. Presentation, Q&A.
- Capital raising: Raised the capital for special projects and equipment needs of the company.
- New product development: In charge of new product development, release schedule, pricing and marketing.
- Portal: Created the portal for partners to ensure timely and accurately ordering of products.
- Shipping: Created the SOP's and systems for shipping of all products.
- Manufacturing: Restructured manufacturing/processing and guiding the company through GMP and FDA certifications while streamlining operations.
- Revenue Growth: Exceeded revenue projections by 30% every year.

COO
VP of Operations
Managing Director

Tricuria

2011 - 2018

2007-2010

2004-2006

Chur, Switzerland

Recruited to turn around and reposition Tricuria AG and all operations of \$65 Million business with domestic and international sales, led the strategic business, finance and operations, spearheading initiatives that resulted in a dramatic turnaround, growth and profitability to successfully position profitable acquisitions. Acquired and turned around automotive, hospitality, retail, sales and M&A businesses. Provided Leadership for a 120 Person workforce and held full P&L responsibility. Oversee all finances, business development, marketing, production, human resources and administrative affairs. Drove performance improvement, organizational restructuring of three companies under one umbrella, and maximized growth through a regular cadence strategy with all stakeholders. Collaborated with CFO and Directors of Sales, Parts, Service and HR to redefine and clarify business strategy. Accountable for 35 local agents throughout the state of Grisons. Reorganized the sales team, provided job training, implemented new cost efficiencies, restructured and consolidated operations, and adjusted inventories to successfully position the company's acquisition.

- Investments: Negotiated multimillion dollar debt investment terms, covenants, and key agreements.
- Business Acquisition: Source for new business in total value of \$35 Million; analyzed market data, researched distressed companies, and attended industry conferences, interacted with financially unstable companies and other industry professionals to generate advisory / workout business.
- Process redesign: Implemented lean Six Sigma principles and a new ERP system to facilitate streamlined business efforts to portfolio companies.
- Operations Re-design: Oversee Operations of investee companies, tactical guidance as well as manage operating budgets and several Million Dollar construction as well as re-design projects.
- Diversified products: Implemented new strategies as well as turned around financial performance for several car brands like Ford, Toyota, Honda, Jaguar, Land Rover, Lexus, Cadillac and Corvette.
- Income Generator – Business Development: Drove income by 15% through renegotiating existing contracts.
- Price Restructure: Negotiated new price structure with distributors, while streaming from five to two distributors, enabling a \$200k increase in bonus.
- Cost reduction: Reorganized workforce and internal procedure of the acquisitions to reduce personnel costs by 35% while reducing overall costs by 20%.
- P&L: P&L responsibility - budgeting, forecasting and reporting for all aspects of the holding company.
- Portfolio Maximization: Sold and acquired real estate and business units in the value of \$60 Mio.
- New Cost Efficiencies: Implemented new cost efficiencies, restructured and consolidated operations, and adjusted inventories to successfully position company's acquisition.
- Personnel Leadership: Oversaw 120 employees and all company budgets, including a \$500K marketing annual budget. Increased profit margin by implementing operations and business development strategies addressing high costs and low margins, while streamlining workforce, improving work culture and retraining employees.
- New Marketing Strategies: Created new marketing strategy and brand image to attract different clientele; developed website and social media campaigns. Streamlined operations, cut costs and initiated capital funding. Managed resources, progress, completion, timeframes and budget while exceeding key operational performance targets.
- Competitive Positioning: Improved company's competitive position by reducing costs 20%, improving customer service, diversifying product line, and growing revenue from \$46M to \$59M+ through a redesigned, aggressive market strategy.
- Sales Driver: Achieved 120% of sales goal for three years and increased annual sales for six consecutive years.
 - Grisotoya sales rose annually from \$5.1M to \$8.25M and Tribocar sales increased from \$3.4M to \$6.8M annually, with no local agents.
- Overturned Key Losses: Reversed Land Rover sales from annual loss of \$250K to a profit of \$200K and Toyota annual loss of \$150K to a profit of \$300K within 12 months.
- Productivity Gains: Improved per-employee productivity, enabling 15% workforce reduction, while increasing net profit margin and sales volume. Average car margin rose from nearly 8% to 10.5%; sales volume increased 50% (nearly 1,000 cars annually to 1,500 annually).
- Customer Focus: Expanded customer base and implemented a new customer contact system that achieved 70% response rate in customer surveys with 90% positive results.
- Successful Buyout: Negotiated company's buyout at 167% of appraised value in 2010.
- Employee Training: Developed and implemented a customized employee training program based on each division as well employee position/title. In doing so saving over 100k annually in external training costs.
- Fleet sales: Increased fleet sales by 200% within the first 3 years.
- Added Local Agents: Increased the number of local agents from 24 to 35, thus increasing revenue and expanding the B2B aspect of the core business.
- Turnaround: Acquired and turned around a 700-guest capacity, restaurant/nightclub property. Increased revenue 20% in first year and 30% year two. Increased net profit of drinks by 20%.
- Return on Investment: Achieved 10%+ ROI through sale of unprofitable business units and acquisition of better ones.

ADDITIONAL LEADERSHIP EXPERIENCE

President

2008 – 2013

Calanda Broncos

Brought on board for clear vision and business expertise to restructure the organization and team culture of an American football club with 35 players in first string and 30-member youth team, bringing considerable exposure and media coverage in Europe and the US. Built a new management board, attracted higher profile sponsors and US players, increased membership and support from the local government. Built a team and coach squad that valued teamwork and loyalty.

- **Business Growth:** Doubled membership while enabling an additional \$25K funding annually to establish a second team.
- **Contract Negotiations:** Organized and negotiated all contracts (stadium, concessions, security, TV coverage) for the EFL Final in Vaduz, Liechtenstein (2012), a game attended by 4,500 and broadcasted to 100,000+ viewers across Europe.
 - Leveraged a vast network to rent a premium 6,000-seat stadium for \$10K and negotiated live television contract for merely \$25K, considering a three-hour program was seen by 100,000 people.
- **Organization Win:** Won 2012 EFL Championship against the Vienna team, a city with 20 times the population.
 - Became the first Swiss team to win the title in the history of EFL.
 - Won 5 Swiss championships in a row plus 2 Junior Championships

EDUCATION

Doctor of International Business Administration (DIBA)

2004

Nova Southeastern University

Fort Lauderdale, FL

Dissertation: The Relationship between Intrinsic and Extrinsic Motivation and Organizational Commitment: A Study in a European Environment, 2004.

MBA

2001

Nova Southeastern University

Fort Lauderdale, FL

Bachelor's in Automotive Marketing and Management (BBA)

2000

Northwood University

West Palm Beach, FL

PUBLISHED ARTICLES

Article: (with Dr. Russell Abratt): Global Managers Wanted – Building Successful International Marketing Leaders. Association of Marketing Theory and Practice, Destin, FL 2004.

Article: The Myth about Minimum Wage. International Business and Economics Research Conference, Las Vegas, NV 2003.

LANGUAGES AND MILITARY SERVICE

Languages: English, German, French

Military Service: Swiss Army Mountain/Antiterrorist Infantry (Soldier, Corporal, Lieutenant, First-Lieutenant ret.), 1997 – 1999

MEMBERSHIPS / AFFILIATIONS

- WACC: World Affairs Council of Charlotte
- GACC: German American Chambers of Commerce
- WACRA: The World Association for Case Method Research and Application
- Kiwanis International
- The Peninsula Golf Club
- The Peninsula Yacht Club
- InterNations: Albatross Member
- Nova Southeastern University: Alumni
- Northwood University: Alumni

CITIZENSHIPS

Citizenships: United States of America and Switzerland (dual passports)

Joseph “Joe” T. Higgins

4502 N. Heatherwood Pl., Tucson, AZ. 85718

joe@joehigginsinc.com C 520-631-7400

Experience: C.E.O. – C.O.O – Entrepreneur – Start Up and Turn Around – Non Profit Board Director

PROFESSIONAL EXPERIENCE

ETHOS LOGOS PARTNERS LLC, Tucson, AZ.

Publishing entity that provides the operational backbone for a public charter, Classical Education school in the PreK to 12th grade market;

Standards aligned, cloud based, Classical Education curriculum available on Amazon.com

Chief Executive Officer, 2018 to Current

LEMAN ACADEMY of EXCELLENCE, Tucson, AZ.

Leman is the fastest growing start up Charter school chain in Arizona history. Locations are opened in Arizona (Tucson, Mesa, Sierra Vista) and Colorado (Denver). LAE opened their first campus in 2015, and currently has 6000 scholars enrolled.

CEO - Direct responsibilities include:

Hiring and training of a staff of over 420 teachers, leaders and support staff

Professional Development program that boast 90% teacher retention rate

Site selection and development of over \$80m of real estate in 6 campuses in two states.

Secured financing through Developer and Investment Banking via municipal bond market.

Public policy experience that helped obtain Charter contracts with various state agencies,

Development of proprietary curriculum aligned Classical Education and State standards.

Expansion into the homeschooler (Virtual Academy) and PreK markets.

Governance and Board Compliance

Brand design and marketing and management

The leadership model of the organization is based on Robert Greenleaf’s Servant Leader concepts.

Leman Academy has been named the “Best Charter School” “Best Community Culture” and “Best Place To Work” (Arizona Daily Star 2015-2017) and “Best School” and “Best Place To Work” (Sierra Vista Daily Herald).

Chief Executive Officer, 2013-2018

QUALITY OF LIFE MEDICAL GROUP, Tucson, AZ.

Mid size general medical and specialty care organization with general practitioners, internists, anesthesiologist, and mid level providers. Quality of Life Research - Clinical medical research company focusing on 1st through 4th stage pharmaceutical and device medical research

Chief Operating Officer, 2008 – 2013

TIBURON DIAGNOSTIC LABORATORY – Tucson, AZ.

Tiburón Labs was a 10-year-old diagnostic lab. Managed the turnaround of this full service, high complexity, lab which offered 24-hour service in Chemistry, Hematology and Microbiology.

Chief Executive Officer – 2009-2012

JOE HIGGINS

START UP & ENTREPRENURIAL EXPERIENCE

1998 to 2016

- **Gotta Go Wireless CEO** - founded in 1998 which grew from direct sales wireless phone distributorship to a 12 store chain in two states with 80+ employees and sales of \$2.1 million.
- **Sports Buzz Haircuts CEO** - was founded in 2003 and has grown to 9 locations employing 55+, in Tucson AZ. Franchise offering circulars, operation manuals and licensing agreements are in place to franchise the concept around the southwest.
- **Silverbell Pavilion** – Developer of mid size retail center located on Tucson’s west side. Procured the land, secured financing, managed all construction and leasing.
- **Talking Trash Waste Removal** - was founded in 2004 and is a mid size trash company with commercial and residential divisions. Sold in 2013
- **Rainmaker Medical** – CEO Consulting and service provider to medical practices in Tucson and Phoenix. The company places technicians in medical practice to manage complex services.

EDUCATION BOARDS & COMMISSIONS

Pima Prevention Partnership – Alternative Charter Middle/High School – New Board Member

Salpointe Catholic High School – Board Member – Executive Committee – 13-year member.

Southwest University of Visual Arts – HLC Accredited - 4 Year University – Board Chair

Appointed by Gov. Brewer to oversee the \$1 billion merger of the **University of Arizona Hospital to Banner Health's hospital network.**

COMMUNITY INVOLVEMENT

Arizona Small Business Association – Board President of 40-year-old, group. Launched and chaired ASBA’s public policy efforts to affect small business issues at a state level. ASBA was Arizona’s largest trade association with 11,000 members.

Catholic Community Services – VP Board Member for 6 years of a \$35m social service agency.

Pima County Board of Supervisors – Candidate for public office 2008 – lost in primary.

Tucson Chamber Of Commerce –2004 Small Business Leader of the Year

Arizona Daily Star –2005 40 Under 40 inaugural honoree.

Business Leader of the Year – Arizona 2008 – Marketing – ASBA

Banner Health of Arizona – Clinical Research - Institutional Review Board – Member - Current

EDUCATION

BA, University of Arizona 1993, Tucson, AZ.

M.Ed., Western New Mexico University. Graduate May 2020.

Legal Experience

Kilpatrick Townsend & Stockton, LLP, M&A Associate, Charlotte, NC, May 2022-present

- Serve as lead associate on M&A and private equity deals, managing all aspects of the transaction process.
- Represent platform private equity companies in complex transactions, providing strategic counsel and guidance.
- Provide expert legal and strategic counsel to technology startups, emerging businesses, and investors during equity and debt financing rounds.
- Draft and negotiate purchase agreements, disclosure schedules, and ancillary documents with meticulous attention to detail.
- Conduct comprehensive due diligence, analyzing complex legal and financial data to identify potential risks and opportunities.
- Collaborate closely with clients, senior partners, and in-house legal teams to ensure smooth and efficient deal execution.
- Provide expert legal advice on corporate governance matters, regulatory compliance, and strategic business decisions.

Johnston, Allison & Hord, P.A., M&A, Corporate & Tax Associate, Charlotte, NC, Nov. 2018-Apr. 2022

- Acted as lead associate on multiple high-stakes seller-side and buyer-side M&A transactions, including drafting, reviewing, and revising purchase agreements, due diligence requests and responses, and disclosure schedules
- Provided comprehensive legal and business counsel to startups, established businesses, and investors in diverse industries.
- Conducted thorough due diligence investigations and engaged in assiduous messaging.
- Drafted and negotiated various agreements, including operating, non-disclosure, supply and services agreements.
- Offered strategic guidance on federal and state tax matters, ensuring compliance and optimizing tax efficiency.
- Assisted clients with corporate formation, governance matters, and successful private offerings under Reg. D.

Spilman, Thomas, & Battle, PLLC, Associate, Charleston WV, Aug. 2017-Nov. 2018; Summer Associate, Summer 2015 and 2016

- Represented lenders and borrowers in various financial transactions and structures, including secured commercial credit facilities, acquisition financings, and asset-based lending
- Managed matters pertaining to delinquent accounts, including foreclosures
- Litigated contract disputes and foreclosure cases on behalf of lenders
- Advised clients on corporate formation and governance matters
- Negotiated, drafted, and reviewed a variety of complex commercial and business agreements
- Analyzed case files and drafted formal pleadings, discovery motions, and memoranda for various litigation matters

Community Leadership and Outreach

Union County (NC) Chamber of Commerce, Member of Board of Directors, Monroe, NC, Jan. 2021-present

- Actively participate as a member of the Board of Directors, contributing to policy discussions and initiatives.
- Engage in the Public Policy Committee, influencing policies that positively impact the local business community
- Contribute to the Chamber's Legislative Agenda, providing valuable insights and recommendations on key issues.
- Selected as a participant in the prestigious Leadership Union program, Class of 2020, highlighting leadership potential and commitment to personal growth.

Education

Washington & Lee University School of Law, Juris Doctor; graduated May 2017

- Honors/Activities: Burks Legal Scholar
- GPA: 3.54 (Top Third)

Liberty University, Master of Business Administration; graduated May 2014

- Specialization: Accounting
- Honors/Activities: Member, Sigma Beta Delta International Honor Society for Business (Inducted 2013)
- GPA: 3.81

Liberty University, Bachelor's Degrees of Science; graduated May 2012

Majors: International Business and Business Marketing; Minor: Spanish
Honors/Activities: Dean's List (2009-2012)

Additional Information

Admissions: West Virginia (2017), South Carolina (2018), North Carolina (2019)

Certifications: LexisNexis Professional Research, Certificate of University Teaching (Liberty University)

Awards: Named "One to Watch" in corporate law by *The Best Lawyers in America* (2021, 2022, 2023)

Hobbies: watching football, playing card games, reading, boxing, and swimming

MARCUS H. LONG, JR.

HOME: 1954 Brawley School Road, Mooresville, NC 28117 * (540) 577-0775
E-MAIL: long.marcus50@gmail.com

PERSONAL

Wife:

- Elizabeth Newton-Long; Married: June 23, 1984

Children:

- Jordan Elizabeth Long, Age 32, Soloist with Miami City Ballet
- Brennan Alexandra Long, Age 30, Senior Editor, Southern Living Magazine

PROFESSIONAL EXPERIENCE

27th Judicial Circuit Court July 1, 2012–June 30, 2020

Judge

- Chief Judge, 2013–2015; 2018–2020;
- 2014, Established a Drug Treatment Court for Pulaski County
- 2015, Established a Drug Treatment Court for Floyd County
- 2015, Received Trailblazer Award for establishing and promoting drug courts in Southwest Virginia
- 2016, Established a Drug Treatment Court for Montgomery County
- 2016, Recognized as a “Leader in the Law” by Virginia Lawyer’s Weekly
- 2019, Resolution by Pulaski County Board of Supervisors, recognizing the contributions of Judge Long to Pulaski County
- 2019, Speaker – Virginia Trial Lawyers Association
Topic: Trial Advocacy

27th District Juvenile and Domestic Relations Court April 22, 2005–June 30, 2012

Judge

- 2006, Speaker – Judicial Conference of General District and Juvenile and Domestic Relations Judges
Topic: VASAP and Juveniles
- 2008, Speaker – Judicial Conference of General District and Juvenile and Domestic Relations Judges
Topic: Thorny Issues in Juvenile Traffic Matters
- 2008, Speaker – Virginia State Bar – Advanced Domestic Relations, Continuing Legal Education
Topic: Guardian ad Litem
- 2008, Speaker – Virginia Tech
Topic: Dispositions, Juvenile Delinquents
- 2008–2012, Member – State and Local Advisory Team (SLAT)
Sub-committee, Office of the Executive Secretary, Supreme Court of Virginia
- 2010, Best Practice Court, Montgomery County Department of Social Services
- 2010, Established a Family Drug Court for Montgomery County for families with children in foster care with the Supreme Court of Virginia

Long and Long, Blacksburg, VA 1976-2005

Lawyer

- Member of Montgomery-Radford Bar Association, President 1991-1992
- 10th District Ethics Committee, 1992-1996, Chairman 1995
- Member Virginia State Bar
- Real Estate Committee, 1983-1986
- Virginia Bar Association
- Small Firm Committee, 1988-1989
- Virginia Trial Lawyers Association
- Counsel, Blacksburg-VPISU Sanitation Authority 1986-2005
- Special Counsel, VDOT 1986-2005, Condemnation

EDUCATION

Admitted to practice law in Virginia..... May 15, 1976

Juris Doctor, T. C. Williams School of Law, University of Richmond 1976

Honors and Activities:

- Phi Alpha Delta Legal Fraternity
- Marshall, 1975-1976
- Legal Aid Society, 1974-1976

B.S. Virginia Tech..... 1973

Honors and Activities:

- Dean’s List
- Fellowship of Christian Athletes
- Four-Year Letterman – Golf
- 1970 State Team Champion – Golf
- Beta Theta Pi Fraternity
- Monogram Club

Graduate of Blacksburg High School..... 1969

Honors and Activities:

- President – Key Club
- Student Council
- One of sixteen finalists in the 1968 USGA NATIONAL JUNIOR GOLF CHAMPIONSHIP, Brookline, MA
- Golf Team
1969 State Individual and Team Champion
1969-2008 State Individual Record Holder
- Fellowship of Christian Athletes

ACTIVITIES

- Member and Former Trustee, Blacksburg United Methodist Church
- Former Member and President, Christiansburg-Blacksburg Rotary Club
- Former Member and President, Blacksburg Jaycees
- Former Member Board of Directors, New River Valley Friends of the Roanoke Symphony
- Former Member Board of Directors (Advisory) First Union Bank Montgomery County
- Member and Chairman of the Board of Directors of Children’s Home of Iredell County, NC

- Member of the Board of Directors of Safe Surfing Foundation (protects and educates teenagers and adults from online predators and safe internet use)



SUSAN TILLIS

BROKER IN CHARGE/BRANCH LEADER

704-999-2889

tillis.susan@gmail.com

16116 North Point Road
Huntersville, NC 28078

PROFESSIONAL SUMMARY

Today, as branch leader of the Allen Tate Davidson office, Susan has the opportunity to share her experience and passion with both agents and clients. Her peers respect her as a warm, protective leader and a down-to-earth community volunteer who enjoys giving back. She's passionate about helping military families and heads The Susan M. Tillis Foundation to champion that cause.

ACADEMIC BACKGROUND

BENTLEY COLLEGE

BACHELOR OF SCIENCE
MARKETING MANAGEMENT

1981-1985

MINGLE SCHOOL OF REAL ESTATE

2005

WORK EXPERIENCE

BRANCH LEADER/BROKER IN CHARGE

ALLEN TATE REALTORS, DAVIDSON, NC

2016 TO PRESENT

BROKER/REALTOR/SALES MANAGER

ALLEN TATE REALTORS, CORNELIUS, NC

2005-2016

AWARDS RECEIVED

TOP 50 MOST INFLUENTIAL WOMAN AWARD

TOP 50 WOMEN OF INFLUENCE RECOGNIZE THE IMPORTANT ROLE WOMEN PLAY IN THE GREATER CHARLOTTE REGION, IN THE ECONOMY, EDUCATION, AND NOT-FOR-PROFIT FIELDS.

DECEMBER 2020

NC SERVES AWARD

AWARDED TO SUSAN FOR HER COMMITMENT TO VETERANS AND THEIR FAMILIES

OCTOBER, 2017

ALLEN TATE COMMUNITY INVOLVEMENT AWARD

COMMUNITY INVOLVEMENT FOR OUTSTANDING CONTRIBUTIONS TO ORGANIZATIONS IN THEIR COMMUNITY.

OCTOBER, 2017

ALLEN TATE PURPOSE AND PRIDE

OCTOBER, 2018

ALLEN TATE CUSTOMER CARE AWARD

OCTOBER, 2018

TOP WOMEN IN BUSINESS AWARD - BUSINESS TODAY

OCTOBER, 2015

Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school’s entire program, competent stewardship of public funds, and the school’s fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information

Name of charter school	Trinitas Classical Academy
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Board Member’s Information

Board Members	Full name: Mikail Clark
	Home Address: 4131 Gibbon Rd., Charlotte, NC 28269
	Business Name & Address: 214 North Tryon Street, Charlotte, NC 28202-2381
	Telephone No.: 704 338 5286

	E-mail address: moclark@ktslaw.com
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Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/> (The Union County Chamber of Commerce, Inc.)
Educational History	<p>Washington and Lee University School of Law J.D., Banking, Corporate, Finance, and Securities (2017) Burks Legal Scholar</p> <p>Liberty University M.B.A., Accounting and Finance (2014) Sigma Beta Delta International Honor Society for Business</p> <p>Liberty University B.S. (2012) International Business and Business Marketing, Minor in Spanish, Dean’s List, Chancellor's List</p>
Employment History	<p>Currently, Mikail is a M&A attorney at the Charlotte, NC office of Kilpatrick Townsend & Stockton, LLP, an international full-service law firm. In his role, he advises many clients across various industries—including, but not limited to, distribution, energy, financial services, healthcare, manufacturing, real estate, retail, and technology—and assists them with achieving their unique, and often complex, business goals.</p> <p>Previously, Mikail was a corporate attorney at Johnston, Allison, & Hord, P.A., a regional, mid-size, full-service law firm located in Charlotte, NC and at Spilman, Thomas & Battle, a super-regional mid-size, full-service law firm based in Charleston, WV.</p>

How were you recruited to join this Board of Directors?	I have worked with Walter Tribolet in a professional capacity and he invited me to the board.
Why do you wish to serve on the board of the proposed charter school?	I am a father of kids that currently attend a classical charter school and I have seen first hand how impactful the education model and the ability to chose a school that better fits my family. This option should be available to more people in the Charlotte area.
How were you recruited to join this Board of Directors?	I was referred by Walter Tribolet.
Why do you wish to serve on the board of the proposed charter school?	Education has been an important part of my life. My mother has been a long term teacher (including in a classical school), so I have seen first hand the importance of quality schools, teachers who care and a values centered education.
What is your understanding of the appropriate role of a public charter school board member?	As a non-profit board member, we have a duty to ensure the organization is running strong, responsible to the community, and delivering quality public education.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I am passionate about economic development and currently serve on the Board of Directors for the Union County Chamber of Commerce. I am dedicated to using my experience to champion business growth and balanced economic prosperity in and around the greater Charlotte region by supporting sound economic policy, promoting free enterprise, encouraging innovation, and reducing barriers to entry.
Describe the specific knowledge and experience that you would bring to the board.	I have extensive background in legal aspects of business, contract law, financing among other experiences which I can lend to the organization.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	The school's mission aligns with what is important to me and my family. Raising the bar in academics, a focus on Western Civilization, and focusing on character formation are extremely important to me. Our mission of partnering with parents and respecting teachers are also important to my beliefs.
What is your understanding of the school's proposed educational program?	I have kids in a classical education k8 charter school, so I am versed in the ins and outs of the classical model. I am very happy with our decision
What do you believe to be the characteristics of a successful school?	A successful school to me, will have great teachers, a strong culture, and delivering on what we promised to our parents.
How will you know that the school is succeeding (or not) in its mission?	Feedback from our teachers and our parents will be an area that I want to focus on as a board member. If we manage these two stakeholders, I think we will have long-term success.

Governance

Describe the role that the board will play in the school's operation.	As a non-profit board member I understand our role to be advisory and as an oversight capacity. Operationally, we set policies and empower the Principal to act.
How will you know if the school is successful at the end of the first year of operation?	I view success in the first year as finding competent and engaged staff members and meeting our budgetary goals.
How will you know at the end of five years of the schools is successful?	After five years, success to me looks like a functioning governing board, strong enrollment and excellent feedback from our stakeholders.
What specific steps will the charter school board need to take to ensure that the school is successful?	Specific steps I can help the board with include areas of legal questions, contracts, and transactions. I am not the attorney for the board but I'm comfortable working with the school's attorney to make sure we are addressing legal issues correctly.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	The ethical policy we have in place clearly explains what constitutes a conflict. The process would be disclose, review, and decide how to proceed with the ethics complaint.

Certification

I, Mikail Clark_, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinita Charter School is true and correct in every respect.

Board Member's Signature

Signature 

Date 4/11/24

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. [Click or tap here to enter text.](#)*



Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. Please include a one-page resume with this form and sign by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information	
Name of charter school	Trinitas Classical Academy
Board Member's Information	
Board Members	Full name: Walter Christian Tribolet
	Home Address: 17600 Westward Reach Rd, 28031 Cornelius, NC
	Business Name & Address: Native Ceuticals, 500 S. Main St. #119, 28115 Mooresville, NC
	Telephone No.: 704-763-2467

	E-mail address: walter_tribolet@yahoo.com
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Board Member Application	
<p>Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?</p>	<p>No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/></p>
<p>Educational History</p>	<p>1999-2000 Bachelor in Automotive Mkt/Mgmt 2000-2001 Master of Business Administration 2001-2004 Doctor of International Business Administration</p>
<p>Employment History</p>	<p>2004-2018 TricuriaAG. Managing Director, VP, COO 2019-present Native Ceuticals CEO</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I was introduced to the board through a friend and have worked with the early board to bring additional board members in.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I was born and raised in Switzerland so education is something dear to my heart. I also have seen first hand the importance and positive effects education has on Society itself.</p>

How were you recruited to join this Board of Directors?	See above
Why do you wish to serve on the board of the proposed charter school?	I am a father and business leader in the Mooresville area. We are in desperate need for a higher quality option for public schooling.
What is your understanding of the appropriate role of a public charter school board member?	Academics and Finances. As a board member, I see my role as creating an environment and hiring great individuals so these 2 points can be considered a success.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I served on the board of directors of other companies. In addition, I was the President of an American Football Club in Switzerland. Not only for the adults but also responsible for the whole youth program which under my leadership quadrupled in attendance and won championships for the first time in the history of the club. I hired coaches, replaced equipment, negotiated new fields and made sure only players were playing who were academically and grade eligible. If students fell short academically, I organized tutors as well.
Describe the specific knowledge and experience that you would bring to the board.	Served in the Swiss Army where I became a Lieutenant at age 21 and achieved my Doctorate at age 27. I worked in non-profit like American Football Club mentioned above. I have been a member in many social clubs like Kiwanis and Educational non-profits like WACRA. In addition, I speak 3 languages and have grown privately owned companies on 2 different continents.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	A school's mission should also be one to provide the best possible education for the children while also instilling a sense of community, ethics and common goals. Our school's mission statement includes academic rigor which I think is lacking in our area.
What is your understanding of the school's proposed educational program?	A classical, well-rounded education incl. arts, music, languages, philosophy and sciences. This model is similar to what I experienced in Europe, and I think our community needs this now more than ever.

What do you believe to be the characteristics of a successful school?	Making an impact in the community by providing kids with an education that will help them succeed and have a better life.
How will you know that the school is succeeding (or not) in its mission?	Success is measured by goals. If goals are met, then it's a success. Strong enrollment and finances as well as being able to hire amazing teachers who truly care about our students. On the academics side it is our goal to be the top school in the region with a diversified student body.

Governance

Describe the role that the board will play in the school's operation.	Providing leadership, calm and direction. Making sure the goals are clearly defined and worked towards on. Holding school leadership accountable.
How will you know if the school is successful at the end of the first year of operation?	Reaching our enrollment target plus hiring a principal who shares our vision and mission. Filling the staff with amazing teachers who will bring value and heart to the school. Lastly, being not only accepted but also embraced by the community.
How will you know at the end of five years of the schools is successful?	Financial and Academic goals are being met or exceeded. The buzz around town is that our school is the one your child should go to.
What specific steps will the charter school board need to take to ensure that the school is successful?	Hiring the best talent. Principal, Teachers and Administration. My business background has shown that people make a venture successful, we must and will focus on talent.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	Report to the appropriate channel depending on who it would be. If it's a member then to the chair. If it's the chair then to VP or treasurer. Minor issues would be addressed in a timely manner in a board discussion. Everything written down on protocols. If it would be crossing the line into criminal behavior, then instantly inform law enforcement. There is no place for unethical behavior in a school setting.

Certification

I, Walter Tribble, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Tinley Charter School is true and correct in every respect.

Board Member's Signature

Signature


Date 4/9/2024

**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. Click or tap here to enter text.*

MARK LOCKMAN

119 Palos Verde Drive • Mooresville, NC 28117
(704) 902-4560 • mlockman@rlwest.com

PROFESSIONAL EXPERIENCE

RL WEST DEVELOPMENT (REAL ESTATE DEVELOPMENT)

(MOORESVILLE, NC).....2012 – PRESENT

- Developed Langtree Project in Mooresville, NC, an iconic waterfront mixed use project that will serve as both the gateway to Iredell County as well as the catalyst for future development in the region.
- In charge of vision, design and construction of development that features 300 apartments over 50,000 square feet of retail space in the first phase.
- Developed and built multi-story office buildings along with structured parking deck.
- Developed and built additional retail to fill in perimeter parcels at Langtree.
- Master planning and developing an additional 205 acre site in Mooresville to include residential and Class-A office park.

GILLILAND & ASSOCIATES, INC. (ARCHITECTURE/CONSTRUCTION MGMT.)

(GREER, SC)..... 2007 - 2012

Project Management

- Oversee and advise site planning, architectural, and pro forma to maximize potential for project success as well as compliance with state regulation
- Develop project plan and tracking modules to inform progress and timeline, and regularly report status of project to company president
- Advise and manage additional projects for the firm
- Conceived and developed two healthcare campus projects that are the primary focus of the firm
- Acquired land partner for development of the projects
- Perform all due diligence for projects to include interaction and consultation with various state regulatory and licensing agencies for all development in the health care industry
- Target and acquire suitable tenants for land partner's waterfront development

JD NORTH CONSTRUCTION COMPANY, INC. (CORNELIUS, NC).....2005 - 2009

Project Management

- Utilize project management application to ensure schedule, issues, tasks, and deliverables are achieved

- Conduct weekly construction meetings with appropriate stakeholders
- Administer all aspects of building/construction requirements to meet client expectations
- Manage budget controls throughout project life
- Direct change order process and problem resolution
- Perform lead generation for prospective and viable real estate development projects
- Provide consultation and corporate representation in residential and commercial venues for development
- Continuously maintain pipeline opportunity relationships for business development
- Partner in concept and design development of multi-million dollar real estate projects
- Managed the design/construction of High School project (70,000 sq. ft.)
- Perform due diligence to qualify development projects
- Develop and deliver required prospectus and pro formas to investors
- Generate venture capital opportunities for development projects

MIDAS SPRING WATER (HUNTERSVILLE, NC).....2003 – 2006

General Manager

- Re-established all functional and business operational aspects of 2nd oldest bottled water company in United States
- Designed and engineered production line upfit (locating, purchasing and managing the installation of new production line components)
- Directed all staffing responsibilities
- Developed vendor base for all production supplies and inventory maintenance
- Managed lead generation sales for reintroduction of existing brand
- Coordinated and consulted on development of new product packaging, advertising, and promoting of brand

CNJ DEVELOPMENT CORPORATION (CORNELIUS, NC)..... 2001 - 2005

President

- Co – developer and builder for multi-townhouse community
- Managed historic renovation of Midas Spring Water facility in Mecklenburg County
- Developed and built American corporate headquarters for Liburdi Dimetrics.

DAVIDSON DAY SCHOOL (DAVIDSON, NC)..... 2000 - 2001

Co-founder

- Conceived of and built Private K-8 School
(Began with 65 students, currently over 600 in campus built by JD North)
- Managed operations

- Developed and constructed initial location
- Raised capital
- Hired faculty
- Consulted on development of curriculum and administration
- Developed and delivered marketing plan
- School Board and Executive Committee member (6 years)

IREDELL-STATESVILLE SCHOOLS (STATESVILLE, NC).....1998 - 2000

Executive Director of Testing and Research

- Oversaw state testing program system-wide
- Generated system and school level reporting to monitor adherence to state mandated testing benchmarks
- Managed and trained all system testing coordinators

CHARLOTTE-MECKLENBURG SCHOOLS (CHARLOTTE, NC)..... 1990 - 1998

Project Manager/Assessment

- Developed criterion-referenced testing program to inform the instructional process
- Managed and trained all system testing coordinators

BANK OF AMERICA (GREENSBORO, NC).....1987 - 1990

Project Manager

- Managed all aspects of project design and delivery for various financial initiatives within the Bank Card Operations division

Appalachian State University: Grad. Student – Teacher

FORMAL EDUCATION:

BA IN PSYCHOLOGY

MASTERS IN INDUSTRIAL/ORGANIZATIONAL PSYCHOLOGY

Charter School Board Member Information Form

Note: To be completed individually by each proposed founding charter school board member. Please include a one-page resume with this form and sign by hand.

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

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The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information

Name of charter school

Trinias Classical Academy

Board Member's Information

Board Members

Full name: Joe (Joseph) Thomas Higgins

Home Address: 4502 N Heatherwood Pl – Tucson, AZ 85718

Business Name & Address:

Telephone No.: 520-631-7400

E-mail address: joe@johigginsinc.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?

No: Yes:

Educational History

**BA, University of Arizona 1993, Tucson, AZ.
M.Ed., Western New Mexico University. Graduate May 2020.**

Employment History

**C.E.O. – C.O.O – Entrepreneur – Start Up and Turn Around – Non Profit Board Director
Ethos Logos Publishing – CEO
Leman Academy of Excellence – CEO
Quality of Life Medical – COO
Tiburón Diagnostic Lab - CEO**

How were you recruited to join this Board of Directors?

I was introduced to this Board of Directors by a mutual friend that met Mark Lockman and his group and learned that they were looking to open a Classical Education school.

<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I have extensive background in Classical Ed charter schools and have seen the impact they make on families and the communities they serve. I believe the world will be much better with Classical schools open and serving children. I have dedicated my professional life to the Classical Ed movement in America.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>See above</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I have come to know the group and believe this school will be a big success. I hope to be part of this school's origin story and help in any way I can ensure it starts strong.</p>
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>Public charter schools are arms of the State of North Carolina and function under contract to provide education services to state residents. As a non-profit and a public body, we have fiduciary duties to the stakeholders and must abide by open meeting laws.</p>
<p>Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.</p>	<p>I previously served as the CEO of Lemman Academy of Excellence, a fast-growing charter school chain in the US from 2013 to 2018. In that role, I was responsible for hiring and training over 420 teachers and staff, developing a professional development program with a 90% teacher retention rate, overseeing site selection and development of over \$80 million in real estate for 6 campuses, securing financing through municipal bonds, and developing proprietary curriculum aligned to the Classical Education pedagogy. I have served on the boards of several other educational institutions, including Pima Prevention Partnership (an alternative charter middle/high school), Salpointe Catholic High School, and Southwest University of Visual Arts.</p>
<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>I have a firm understanding of governance, compliance, and strategic oversight of educational institutions. I have a track record of entrepreneurship and business leadership, having founded and led several successful start-up companies in the wireless, retail, and medical services industries.</p>

<p>What is your understanding of the school's mission and guiding beliefs?</p>	<p>The school's mission is the bedrock of Classical schools around the U.S. Values and Virtues instruction, a pursuit of good, true and beautiful, rigor, great teachers – all these ingredients make for a successful Classical school.</p>
<p>What is your understanding of the school's proposed educational program?</p>	<p>I wrote a book on the education program – The Ultimate Guide To Classical Education and Charlotte Mason. I am a subject expert.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school looks similar to the school network I once ran. That is high teacher retention, engaged parents, and kids loving to learn.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>The checks and balances put into the planning of this school will be the metrics that show if we are a success.</p>

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>The role the board plays in running a successful charter school is one of visioning, establishing policies and controls to give the administration a clear plan to follow. We are there as a resource and to ensure the school is successful.</p>
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>After the first year, we should have a strong set of teachers with a year under the belt ready to hone their craft and come back excited for a new school year.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>At the end of five years, I would consider the school a success if we were meeting high academic achievement on the North Carolina end of year exams and more importantly against our peer schools. Teacher retention and training is an important mark of success. I would like to see retention above 75%.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>The charter board must resolve issues, help in the school in the community and come together to solve the issues that arise.</p>

How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?

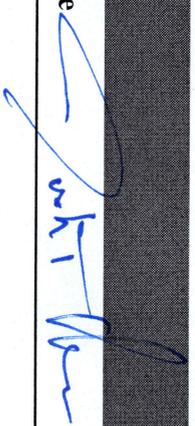
Conflicts of interest are handled as a serious matter. Having served on dozens of boards, the best path forward is to ensure everyone is aware of the conflict and then work through the board chair to address the issue and rectify the conflict.

Certification

I, Joseph T Higgins certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Classical Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature



Date

4.1.2024

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Charter School Board Member Information Form

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School Information

Name of charter school	Trinitas Classical Academy
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Board Member's Information

Board Members	Full name: Mark DeWitt Lockman
	Home Address: 119 Palos Verde Drive – Mooresville, NC. 28117
	Business Name & Address: RL West/150 Landings Dr./Suite 201/Mooresville, NC 28117
	Telephone No.: 704-818-7000
	E-mail address: mlockman@rlwest.com

Board Member Application

<p>Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?</p>	<p style="text-align: center;">No: <input type="checkbox"/> Yes: <input checked="" type="checkbox"/></p>
<p>Educational History</p>	<p>BA Psychology MA I/O Psychology</p>
<p>Employment History</p>	<p>See attached resume.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I saw a need for a school at the prior closed Mt. Mourne campus. I am a long-term resident of the area and understand the importance Mt. Mourne played in building our area. I am one of the founders of this project and my background in working in district schools and founding a private school showed a path to go about re-opening the school.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I think our area has a need for a school that focuses on civic education, values and virtues and Western Civ.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>See above</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>This community is important to me and it's important that we reinvest in our children.</p>

What is your understanding of the appropriate role of a public charter school board member?	To establish and maintain the mission/vision of the school, set expectation for student outcomes/experience to include hiring the executive and instructional team.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	I have 10 years' experience in two public school systems as an administrator. I was instrumental in starting data-based testing and research. I was the co-founder and long-term board member of a successful private school in the area. We came up with the idea and I was part of the team that secured funding, recruited a board, found and opened a facility and hired the staff.
Describe the specific knowledge and experience that you would bring to the board.	My recent experience is in finance and real estate. Prior to my current career I had extensive experience in public and private school administration.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	I sought out and believe in the classical model. The school's mission on academic rigor, a focus on values and virtues, and an effort to teach our students about US civics are all important to me and my belief systems.
What is your understanding of the school's proposed educational program?	I have watched the classical education model grow around the country in private and public charter schools. The school model appeals to a wide group of parents and focuses on educating the entire child in academics, arts, and character development.
What do you believe to be the characteristics of a successful school?	For me a successful school would be one that has teachers that are supported in their careers, students that are meeting their potential, and families that are referring our school to other families.
How will you know that the school is succeeding (or not) in its mission?	A successful school will be one that is full and financially stable.

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>I am the board chair.</p>
<p>How will you know if the school is successful at the end of the first year of operation?</p>	<p>At the end of the first year, I view success as meeting our enrollment targets and having strong teachers that are committed to our school for the long term.</p>
<p>How will you know at the end of five years of the schools is successful?</p>	<p>Over the next five years, I envision our school full of our first group of students graduating and moving on to become great role models in the community. I would like to see our group expand into other areas in the Charlotte area.</p>
<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>If our board hires and oversees a strong Principal, we can ensure we are moving towards success. In my experience, the school leader is critical in a school's success.</p>
<p>How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?</p>	<p>When a potential conflict of interest arises, the board member with the conflict should disclose the details to the full board. The board should evaluate, then determine the best path forward to address the conflict. This may include recusal from the conflicted board member, removal or not pursuing the conflicting issue.</p>

Certification

I, Mark Lockman, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Classical Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature

M. D. [Signature]

Date

4/5/2024

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Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board **must** submit a completed background check that meets the following parameters:

- 1) Background check must include a **Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) Background check must include any **additional aliases** that have been used by the individual.
- 3) Background check must include a completed **county level check for any county returned in the Social Security Trace**.
- 4) Background check must include a completed **nationwide check**.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Walter Tribalet, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature  Date 4.9.2024

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board must submit a completed background check that meets the following parameters:

- 1) Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used) [REDACTED]
- 2) Background check must include any additional aliases that have been used by the individual.
- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Anthony Famiglietti, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature  Date 4/10/24

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____



Charter School Board Member Information Form

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School Information

Name of charter school	Trinitas Classical Academy
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Board Member's Information

Board Members	Full name: Anthony Nicholas Famiglietti
	Home Address: 109 Alexandria Drive Mooresville, NC 28115
	Business Name & Address:
	Telephone No.: 917-370-3653
	E-mail address: runfam@protonmail.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?

No:

Yes:

Educational History

BA Psychology University of Tennessee, Knoxville. Previous minor study in education and fine art with volunteer work and on-site study at the elementary level in Montessori school environments. I became a professional athlete one year prior to graduating university and chose to pursue the path of personal growth through competitive, elite racing as a two-time Olympic track athlete in lieu of a graduate degree.

Employment History

I currently co-own and operate a personal coaching program at Reckless Running LLC which has helped countless youth athletes find their highest potential and calling. Within the last ten years we've watched with joy as many of our athletes have gone on to achieve great success at the Division I collegiate level as well as excel in Ivy League settings and in officer programs within the U.S Military. We make concerted efforts to not only focus on elite performance, as we also strive to introduce many young adults who are beginner level athletes to our unique methods and practices. We emphasize goal setting, constructive self-discipline and positive perseverance to help our clients identify and aim to reach their true potential.

<p>How were you recruited to join this Board of Directors?</p>	<p>I have coached in the area for a number of years and was referred to the group because the classical model features a full student experience. My background in the arts and athletics are a great fit for the school we are looking to open.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I have worked in the greater Charlotte area as a coach and mentor for many years. All of our clients are recommended solely through word of mouth. Our reputation has grown quickly through the success we've achieved assisting others in the community, and as such we have been able to assist some of the current prospective board members who now wished to see us extend our experience and understanding to many others by way of this opportunity.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I have coached in the area for a number of years and was referred to the group because the classical model features a full student experience. My background in the arts and athletics are a great fit for the school we are looking to open.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>In brief, the role in its entirety is a position of dedicated service meant to actualize our diverse range of experience and understanding in order to embolden and enlighten our growing community. I'm a father and I spend a lot of time with young people and I see a need to build something that focuses on academics but life skills as well.</p>
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>Our role, as I understand it, is to work at letting the community know about the school and once open, oversee operation and work through the Principal.</p>
<p>Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.</p>	<p>I've served as a leader and front-runner even in my teenage years. I've lead many around me in life to championship success through the hard earned lessons I've learned through personal experience as well as the lifelong tutelage and mentorship of many incredible people, some of whom are experienced masters level social workers. I've been able to lead and inspire many of my contemporaries as an NCAA scholar-athlete award winner, Team Captain, Team MVP, motivational film maker, motivational speaker, writer and brand sponsored athlete for some of the largest corporations in the world. I believe the greatest service one can offer upon achieving great success is to return to the roots of one's home community in an effort to help teach and inspire others on how to walk that same path and raise the standard for everyone as a whole.</p>

<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>I can only offer a deep, hard-earned knowledge that comes through willingly persevering through physical pain, tragedy, trauma and attempting to clear these obstacles in life with ease and grace as a professional long distance hurdler. My life is my message. My work has been to willingly demonstrate how we can all take on life's endless obstacles and pitfalls by competing as a professional steeplechaser and Olympian. My entire psyche and positive outlook has been developed through this unique, metaphorical allegory. At 45 years of age I've reignited the process and have taken on the new task of aiming to set a Master's World Record in the steeplechase this month. My dream is to teach others that assumed limitations, including age, are often self-imposed through miseducation or self-doubt.</p>
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School Mission and Program

<p>What is your understanding of the school's mission and guiding beliefs?</p>	<p>To support and foster diverse scholarship through a rigorous and well-planned program that supports and inspires youth from every background and ability level to be fully prepared for life's journey. The overarching aim being the advancement of a community-wide student body by setting them off on the right foot as they journey towards a bright future of immense success.</p>
<p>What is your understanding of the school's proposed educational program?</p>	<p>It is a very well thought out and rigorous program that offers a diverse array of in-depth subject matter that I personally would have loved to have offered in my own day as a young student. Most importantly, it offers a healthy and positive environment for our unique, local population of students to feel at home in and be fully engaged and intellectually prepared for the future.</p>

What do you believe to be the characteristics of a successful school?	Integrity is always paramount, followed closely by a prudent and dedicated staff who operate with an optimism that engages and inspires a student body to fully participate and fully engage by way of daily positive feedback and motivation.
How will you know that the school is succeeding (or not) in its mission?	The greatest metric of success is direct feedback which is best gauged by being present, taking part as often as possible, and observing and listening in-person. Standard metrics of assessment like testing are also quite helpful, but are most often a great tool for a board to utilize to direct them as to where they can best enliven the student environment more.

Governance

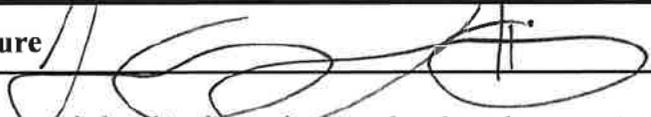
Describe the role that the board will play in the school's operation.	Lending oversight and support as often as possible by utilizing our unique talents and experience.
How will you know if the school is successful at the end of the first year of operation?	Aside from meeting scholastic grade requirements, success is always best judged by assessing direct student and parent feedback as well as teacher feedback.
How will you know at the end of five years of the schools is successful?	I think at the end of five years we are known in the community as a quality school that excels in academics, the arts and education we've done our job. Beyond that, having statistics and data is always a reliable model for gauging success, however success can also be measured in the quality of life of those who've made it through the scholastic program and moved on. Another high resolution metric is in the amount of applicant requests received once many parents have had their children pass through the school and engage the community.

<p>What specific steps will the charter school board need to take to ensure that the school is successful?</p>	<p>It is always paramount for a board to operate with the utmost integrity and actively apply their invaluable experience and understanding through productive and creative engagement. The world is changing very quickly with the advent of new technologies and scientific advancement. Applying these fantastic, modern tools and informational access points effectively and optimally can afford all students an elevated understanding and public growth beyond what many of us can imagine.</p>
<p>How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?</p>	<p>Personally, I would take immediate action to identify and address any said allegations or evidence as such. From there I'd recommended all information regarding such a matter be brought before all members of the board to consider optimal solutions.</p>

Certification

I, Arthur/Famiglie HJ, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Charter School is true and correct in every respect.

Board Member's Signature

<p>Signature </p>	<p>Date <u>4/9/24</u></p>
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**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. Click or tap here to enter text.*

Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information

Name of charter school

Trinitas Classical Academy

Board Member's Information

Board Members

Full name: Marcus H Long Jr.

Home Address: 1954 Brawley School Road, Mooresville, NC 28117

Business Name & Address:

Telephone No.: (540) 577-0775

E-mail address: long.marcus50@gmail.com

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Board Member Application	
Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?	No: <input checked="" type="checkbox"/> Yes: <input type="checkbox"/>
Educational History	B.S. Virginia Tech Juris Doctor, T. C. Williams School of Law, University of Richmond
Employment History	Long and Long, Blacksburg, VA – Lawyer 27 th District Juvenile and Domestic Relations Court - Judge 27 th Judicial Circuit Court - Judge
How were you recruited to join this Board of Directors?	Mark Lockman was introduced to me through mutual friends. I am interested in youth issues and the group interviewed me regarding joining the board.
Why do you wish to serve on the board of the proposed charter school?	I have a long history in youth-based services. As a juvenile courts judge, I got to see firsthand how in need our kids are for a school like we are building.

How were you recruited to join this Board of Directors?	See above answer.
Why do you wish to serve on the board of the proposed charter school?	I have been blessed all my life and have raised two beautiful daughters. Each are different and successful. One pursued the arts and is a professional ballerina. The model we are building is similar to what I experienced in school and my daughters learned when they were growing up. Each child has different talents and abilities and I think the classical model exposes kids to a wide range of ideas and experiences. Hopefully I can help other kids and families chart a similar course as my family did.
What is your understanding of the appropriate role of a public charter school board member?	As a non profit board member, I hope to add my ideas and life experiences to the school.
Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.	As a juvenile justice judge, I've worked with drug treatment, family social services, foster care services, drug rehabilitation and much more. My goal was always to stabilize families and try to put them back on the right track. Many of these efforts involves the community coming around the family with services including their schools. I see that my work is a natural step to helping our school address all socio economic groups that we may teach.
Describe the specific knowledge and experience that you would bring to the board.	See above – I am also on the board of Safe Surfing, which looks to protect children from online predators. I've worked with the Iredell School District to bring our program in to their high schools. I would like to be a resources for Safe Surfing in our school as well.

School Mission and Program

What is your understanding of the school's mission and guiding beliefs?	Our mission to focus on character education and civic education is important to me. We have a real need in our schools to impart these two important ideas onto the next generation.
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What is your understanding of the school's proposed educational program?	The more I learn about the classical education model the more important I think it is for the time and our location. A focus on writing, speaking is so lacking in America today. As a judge and attorney, being able to communicate ideas has made all the difference in my life and I'd like to help kids understand the power of ideas.
What do you believe to be the characteristics of a successful school?	Our school will be a success if we are teaching the great books, ideas and foundations of our country.
How will you know that the school is succeeding (or not) in its mission?	I'm new to school operations so at this point, success to me looks like a good staff and happy parents. I'm looking forward to learning more about how schools judge success.

Governance

Describe the role that the board will play in the school's operation.	On the other non-profit boards I serve on, our goal is to support, set direction, help open doors, and advocate for the non-profit. I'm assuming this board will be similar.
How will you know if the school is successful at the end of the first year of operation?	Strong enrollment and happy students.
How will you know at the end of five years of the schools is successful?	Our school becoming a staple of the Mooresville community.
What specific steps will the charter school board need to take to ensure that the school is successful?	Be present at board meetings, offer help where I can, set a vision for the school.
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	Conflict of interest should be addressed openly and with the full boards knowledge and involvement.

Certification

I, Marcus H. Jory, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature <u>Marcus H. Jory</u>	Date <u>4/9/24</u>
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**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. Click or tap here to enter text.*

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board must submit a completed background check that meets the following parameters:

- 1) Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) Background check must include any additional aliases that have been used by the individual.
- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Marcus H. Long, Jr., certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature Marcus H. Long, Jr. Date 4/9/24

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board **must** submit a completed background check that meets the following parameters:

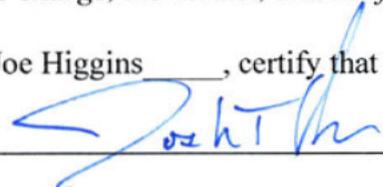
- 1) Background check must include a **Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) Background check must include any **additional aliases** that have been used by the individual.
- 3) Background check must include a completed **county level check for any county returned in the Social Security Trace**.
- 4) Background check must include a completed **nationwide check**.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Joe Higgins, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature  Date 4.1.2023

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board must submit a completed background check that meets the following parameters:

- 1) **Background check must include a Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) **Background check must include any additional aliases that have been used by the individual.**
- 3) **Background check must include a completed county level check for any county returned in the Social Security Trace.**
- 4) **Background check must include a completed nationwide check.**

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Mark Lockman, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature  Date 4/5/2024

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____

**BYLAWS
OF
CLASSICAL EDUCATION SCHOOLS OF NORTH CAROLINA**

WHEREAS, the initial Board of Directors of Classical Education Schools of North Carolina (the "Corporation") caused to be filed with the North Carolina Secretary of State Articles of Incorporation for the organization of the Corporation.

BE IT RESOLVED by the Board of Directors of the Corporation, that these Bylaws will govern its affairs in pursuit of its declared purposes.

PURPOSE & NON-PROFIT STATUS

PURPOSE: To promote the education welfare and enhance and support the educational experience of the students at Classical Education Schools of North Carolina.

ELECTION AS A 501(C)(3) CORPORATION: This Corporation is formed for charitable purposes, and it will be nonprofit and nonpartisan. The corporation is organized exclusively for educational purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under Section 501(c)(3) of the Internal Revenue Code of 1986 (or the corresponding provision of any future United States Internal Revenue law).

EARNINGS; RECEIPTS: No part of the net earnings or receipts of the corporation shall inure to the benefit of, or be distributable to, its members, trustees, officers, or other private persons, except to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes as set forth in the Articles.

ACTIVITIES NOT PERMITTED: No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code (or the corresponding provision of any future U.S. Internal Revenue Law) or (b) by any corporations, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code of 1986 (or the corresponding provision of any future U.S. Internal Revenue Law.)

The Corporation, in all its activities and programs, shall not discriminate on the basis of sex, national origin, ethnicity, religion, disability or any other prohibited manner.

**ARTICLE I
NAME, OFFICE & SEAL**

1.01 NAME: The name of the Corporation is "Classical Education Schools of North Carolina."

1.02 OFFICE: The initial principal office of the Corporation will be located at 1431 Mecklenburg Hwy, Mooresville, NC 28115.

1.03 SEAL: The corporate seal of the Corporation, if any, will be inscribed with the Corporation name and year and place of its incorporation.

ARTICLE II MEETINGS & RECORDS

2.01 REGULAR MEETINGS, FREQUENCY AND PLACE: Regular meetings of the Board of Directors shall be held on at least a quarterly basis at such places and at such times as the Board may determine.

2.02 ANNUAL MEETING: The Annual Meeting of the Board of Directors shall be held on the occasion of its First (1st) Quarterly meeting each and every fiscal year, or as otherwise determined by the Board.

2.03 SPECIAL MEETINGS: Special meetings of the Board of Directors may be called by the Chairman, Secretary, or by any one or more Board members with the consent of the Chairman or Secretary, which consent will not be unreasonably withheld, for any purpose not otherwise proscribed by law, grant or loan condition, or the Articles of Incorporation, to transact any business described in the call for the special meetings.

2.04 NOTICE OF MEETINGS: Written notice stating the date, time, and place of a meeting of the Board of Directors and, in case of a special meeting of the Board of Directors, the purpose or purposes for which the meeting is called, shall be given to each Director entitled to vote at such meeting at least ten (10) days and not more than sixty (60) days before the meeting. Such notice shall be given in one of the following manners: personally, by mail, by private carrier, by telephone, by teletype, by telephone facsimile, by other form of wire or wireless communication, or by such other manner as then permitted by the North Carolina Business Corporation Act. Such notice shall be given by the secretary or by the person or persons authorized to call Directors' meetings. If such notice is in written form, it is deemed effective upon the earliest date of the following: (a) when received; (b) if mailed post prepaid by United States mail and addressed to the Director at his/her/its address as it appears on the stock ledger books of the corporation, when mailed; (c) on the date shown on the return receipt, if sent by registered or certified mail, return receipt requested, and the receipt is signed by or on behalf of the addressee. If such notice is oral, such notice is effective when communicated, if communicated directly to the person to be notified in a comprehensible manner. Notice of any Directors' meeting may be waived by any Director before or after the date and time of the meeting. Such waiver must be in writing, must be signed by the Director, and must be delivered to the corporation for inclusion in the minutes or filing with the corporate records.

2.05 QUORUM: A quorum of the Board consists of a majority of the number of Directors specified in, or fixed in accordance with, these bylaws. If a quorum is present when a vote is taken, the affirmative vote of a majority of Directors present is the act of the Board of Directors.

2.06 ACTION BY DIRECTORS WITHOUT A MEETING: Any action permitted to be taken at a Directors' meeting may be taken without a meeting if one or more written consents, setting forth the action so taken, are dated and signed by all of the directors entitled to a vote. Any such action taken shall be effective when all such consents have been delivered to the corporation, unless the consent specifies a later effective date.

2.07 CORPORATE RECORDS: The Corporation will maintain at its principal office all financial books and records of account, all minutes of the Board meetings and committee meetings, the list of Directors, and copies of all other material corporate records, books, documents and contracts as required by North Carolina law. All such records will be made available for inspection at any reasonable time during usual business hours for any lawful purpose to any officer, Director, or person authorized by law or the Board to inspect such records, and the Corporation's records will also be available to the extent required by the North Carolina Nonprofit Corporation Act where applicable for public inspection and copying as promptly as possible as required by such act. Upon leaving office, each Director, officer or agent of the Corporation will turn over to the Chairman in good order any Corporation monies, books, records, minutes, lists, documents, contracts or other property of the Corporation in his or her custody or control.

2.08 ORDER OF BUSINESS: Board meetings shall generally proceed with the following order of business:

- Roll Call and Establishment of a Quorum
- Public Comments
- Reading and Approval of Minutes of Preceding Meeting(s)
- Reports of Committees
- Reports of Officers
- Old and Unfinished Business
- New Business
- Adjournments

The Board of Directors may, by majority vote, adopt a different agenda order.

2.09 RECORD OF BOARD ACTION: All motions and resolutions of the Board will be written or recorded in the minutes of the Board and certified copies will be placed in a journal of proceedings of the Board. Such records shall be maintained in accordance with state law and Article 2.07 herein.

2.10 TELEPHONE MEETINGS: Any Director may participate in a meeting of the Directors by means of communication by which all persons participating in the meeting can hear each other during the meeting. A Director participating in a meeting by this means is deemed to be present in person at the meeting

2.11 VOTING: All matters at any meeting of the Board of Directors or any of its designated committees, except as otherwise provided in these Bylaws, the Articles of Incorporation, or as permitted by law, will be decided by a vote of a majority of the Directors present at or lawfully participating in the meeting. If a quorum of the Board is present or lawfully participating in the meeting, the affirmative vote of a majority of the Board of Directors will be the act of the body corporate, unless the vote of a greater number is required by statute, regulation, the Articles of Incorporation, or these Bylaws. Any Director may request a roll call vote on any motion or resolution. Directors may not vote by proxy or secret ballot.

2.12 LIST FOR MEETING: After fixing a record date for a meeting, the corporation shall prepare an alphabetical list of the names of all members on the record date who are entitled to notice of the meeting. The list must show the address and number of votes each member is entitled to cast at the meeting. The Corporation must prepare on a current basis through the time of the membership

meeting a list of members, if any, who are entitled to vote at the meeting, but not entitled to notice of the meeting. The list must be available for inspection by any member, beginning two business days after notice of the meeting is given for which the list is prepared, and continuing through the meeting, at the Corporation's principal office or at the place identified in the meeting notice in the city where the meeting will be held. Subject to North Carolina law, a member, the member's agent, or the member's attorney is entitled to inspect the list during business hours at any time during the period it is available for inspection.

ARTICLE III **DIRECTORS**

3.01 MANAGEMENT: The activities, affairs, property and powers of the Corporation will be managed, directed, controlled or exercised by and vested in the Board of Directors.

3.02 NUMBER AND QUALIFICATIONS: The Board of Directors will consist of no fewer than THREE (3) persons.

3.03 REMOVAL: Any Director who fails to attend three (3) consecutive meetings may be asked to resign from office by resolution of the Board of Directors. The Secretary will notify Directors when they have missed three (3) regular consecutive meetings. Absences may be formally excused by vote of the Board. The Secretary will certify a Director's excessive absence to the Chairman. Any Director may also be removed with or without cause upon a two-thirds (2/3) majority vote of all the remaining directors for removal. However, the Chairman of the Board may only be removed upon a two-thirds (2/3) majority vote of all the remaining directors for good cause.

3.04 TERM: The Directors shall serve for three-year terms, which may be renewed indefinitely by each respective Director, subject to Articles 3.03 and 3.06 herein.

3.05 VACANCY: The Chairman of the Board will appoint Directors to fill vacancies. Each Director appointed or designated to fill a vacancy on the Board of Directors will hold office for the remainder of the term of the Board of Directors. A vacancy occurring on any committee may be filled by the Board of Directors for the remainder of the term of the position.

3.06 RESIGNATION: Any director or officer may resign from the Corporation by delivering a written letter of resignation to the Chairman of the Board.

3.07 COMPENSATION: Except as provided in this section, no Director will receive directly or indirectly any salary, compensation or gift from the Corporation, except as authorized by state law. The Directors of the Corporation will serve as such without salary. No Director will be entitled to any dividend or any part of the income or principal of the Corporation or to share in the distribution of the assets upon dissolution of the Corporation. The Board of Directors may authorize the payment by the Corporation of the reasonable, documented and allowable expenses incurred by a Director in performance of his or her duties in accordance with state and federal law.

3.08 CONFLICT OF INTEREST: The Board shall adopt (and periodically review) a Conflict of Interest Policy satisfying the requirements of federal and state law governing conflicts of interest and interested transactions among board members, officers, and directors.

3.09 POWERS: All corporate powers, except, such as are otherwise provided for in these

Bylaws, and under North Carolina law, are hereby vested in and shall be exercised by the Board of Directors. Without limiting the Board's authority, the following powers and duties must generally be exercised by the Board, acting as a body corporate in meetings posted in compliance with Section 55A of North Carolina General Statutes:

- a. Final authority to hear or decide employee grievances, citizen complaints, or parental concerns;
- b. Final authority to adopt or amend the budget of a committee or school;
- c. Final authority to authorize the expenditure or obligation of state funds or the use of public property;
- d. Final authority to direct the disposition or safekeeping of public records;
- e. Final authority to adopt policies governing school operations;
- f. Final authority to approve audit reports; and
- g. Initial or final authority to select, employ, direct, evaluate, renew, non-renew, terminate, or set compensation for the Chief Executive Officer.

ARTICLE IV OFFICERS

4.01 OFFICERS: The officers of the Corporation will consist of the Chairman of the Board, a Vice-Chairman of the Board, and a Secretary/Treasurer and any other officers that the Board may establish and designate by resolution adopted by a majority of vote of the whole Board.

4.02 APPOINTMENT: The officers of the Corporation will be appointed each year by the Chairman of the Board at its annual meeting.

4.03 CHAIRMAN: The Chairman of the Board will preside at all meetings of the Board of Directors. The Chairman will have other powers and duties not inconsistent with these Bylaws as may be assigned by the Board. The Vice-Chairman will have the powers and duties of the Chairman in his absence.

4.04 SECRETARY: A Secretary will act under the direction of the Chairman and in his absence, have the duties and powers of the Chairman. A Secretary will have other duties and powers as the Chairman of the Board of Directors may assign. The Secretary will have the general powers and duties usually vested in such office of a Corporation, including keeping all records, documents and the corporate seal at the principal office of the Corporation; affixing the corporate seal to any instrument requiring it and to attest the same by his or her signature when authorized by the Board of Directors or after the instrument has been signed by the Chairman, Vice-Chairman or other authorized officer or agent; keeping the minutes of the meetings of the Board of Directors, the Executive and other committees of the Board of Directors, the Executive and other committees of the Corporation to recorded in one or more books provided for that purpose, with the time and place, how they were called or authorized, the notice given, the names of those present, and the proceedings therein; and issuing proper notices in accordance with these Bylaws. The Secretary

will have such other powers and duties not inconsistent with these Bylaws as may be assigned by the Board of Directors or the Chairman.

4.05 TREASURER: The treasurer shall: (a) have charge and custody of and be responsible for all funds and securities of the corporation; receive and give receipts for money due and payable to the corporation from any source whatsoever, and deposit all such money in the name of the corporation in such banks, trust companies or other depositories as shall be selected in accordance with the provisions of Article VI of these bylaws; and (b) in general perform all of the duties incident to the office of treasurer and such other duties as from time to time may be assigned to the treasurer by the Chairman or the board of directors.

4.06 OTHER OFFICERS: The Board of Directors may create by resolution other offices as it deems necessary to serve the Corporation, who need not be directors, to serve as officers or agents of the Corporation.

ARTICLE V COMMITTEES

5.01 APPOINTMENT: The board of directors, by resolution adopted by a majority of the full board, may designate one or more of its members to constitute an executive committee or any other committee. Each committee shall have two or more members, who serve at the pleasure of the board of directors. The designation of such a committee and the delegation to it of authority shall not operate to relieve the board of directors, or any member of it, of any responsibility imposed by law.

5.02 AUTHORITY OF EXECUTIVE COMMITTEE. If the board of directors appoints an executive committee, the executive committee shall have and may exercise all of the authority of the board of directors when the board of directors is not in session except as set forth in Section 3.3 herein.

5.03 LIMITS ON AUTHORITY OF COMMITTEES. No committee, including the executive committee, may do any of the following:

- a. Authorize distributions;
- b. Approve or propose to members action required by law to be approved by members;
- c. Fill vacancies on the board of directors or on any of its committees;
- d. Amend Articles of Incorporation pursuant to N.C.G.S. § 55-10-02;
- e. Adopt, amend, or repeal bylaws; or
- f. Approve a plan of merger;

5.04 TENURE. Each member of a committee shall serve at the pleasure of the board of directors.

5.05 MEETINGS AND NOTICE. Regular meetings of a committee may be held without notice at such times and places as the committee may fix from time to time by resolution. Special meetings of a committee may be called by any member of it upon not fewer than five days' notice stating the place, date, and hour of the meeting. Notice of special meetings shall be given in the same manner as is notice of special director meetings and as specified in Article 2.03 hereof. Any member of a committee may waive notice of any meeting, and no notice of any meeting need be given to any member of it who attends in person. The notice of a meeting of a committee need not state the business proposed to be transacted at the meeting. Any regular or special meeting may be by means of conference telephone or other device permitted under these bylaws.

5.06 QUORUM: A majority of the members of committee shall constitute a quorum for the transaction of business at any meeting of that committee, and action of the committee must be authorized by the affirmative vote of a majority of the members present at a meeting at which a quorum is present.

5.07 ACTION WITHOUT A MEETING. Any action that may be taken by a committee at a meeting may be taken without a meeting by one or more written consents, setting forth the action so taken, signed by all members of that committee.

5.08 RESIGNATION AND REMOVAL: Any member of a committee may be removed at any time, with or without cause, by resolution adopted by a majority of the full board of directors. Any member of a committee may resign from the committee at any time by giving written notice to the president or secretary of the corporation, and unless otherwise specified in the notice, the acceptance of such resignation shall not be necessary to make it effective.

5.09 VACANCIES: Any vacancy in a committee may be filled by a resolution adopted by a majority of the full board of directors.

5.10 PROCEDURE: A committee shall elect a presiding officer from its members and may fix its own rules of procedure which shall not be inconsistent with these bylaws. A committee shall keep regular minutes of its proceedings, and report the same to the board of directors for the board's information at the meeting thereof held next after the proceedings shall have occurred.

ARTICLE VI

DEPOSITS, CHECKS, LOANS AND CONTRACTS

6.01 DEPOSITS: All funds of the corporation not otherwise employed shall be deposited from time to time to the credit of the corporation in such banks, trust companies, or other depositories as the board of directors may select.

6.02 TRANSACTIONS: All checks, drafts, endorsements, notes and evidences of indebtedness of the Corporation will be signed by such officers or agents and all endorsements for deposits to the credit of the Corporation will be made as authorized by the Board of Directors. The board of directors may authorize any officer or officers, agent or agents, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances.

6.03 LOAN OR GRANT AUTHORITY: No loans shall be made, or accepted, on behalf of the corporation, and no evidences of indebtedness shall be issued in the corporation's name, unless

authorized by a resolution of the board of directors. Such authority may be general or confined to specific instances.

6.04 INSIDER DEALING: Subject to any law, regulation, or contractual agreement of the North Carolina General Statutes, no Director, officer or committee member will be interested directly or indirectly in any contract or program involving Corporation assets, relating to the operation conducted by it or in any contract for furnishing services or supplies to it, unless (a) the contract is authorized by a majority of Directors present at a meeting in which there is a quorum and vote without the interested Director's presence, (b) the facts and nature of the Director's interest is fully disclosed to the whole Board of Directors before the meeting in which the contract will be considered and (c) the Corporation could not have obtained a more advantageous arrangement with reasonable effort under the circumstances.

6.05 INSIDER LOANS: No loans or grants will be made by the Corporation to its Directors, officers or committee members during their term of office. The Directors who vote for or assent to, and any officer who participates in, the making of a loan to a Director or officer will jointly and severally be liable to the Corporation for the amount of the loan until it is repaid.

ARTICLE VII

INDEMNIFICATION OF DIRECTORS AND OFFICERS

7.01 LIABILITY: A Director or officer committee member will not be required to furnish any bond or surety for his services as a Director or committee member and will not be liable for the act or omission of any other Director. The Board of Directors will have the power to purchase and maintain at the Corporation's expense insurance on behalf of the Corporation, the Board of Directors, and others.

7.02 INDEMNIFICATION: The corporation shall indemnify to the fullest extent permitted by the North Carolina Nonprofit Corporation Act any person who has served as a Director or officer of the corporation to the fullest extent permitted by law against (a) expenses, including reasonable attorneys' fees, actually and necessarily incurred by him or her in connection with any action in which such Director or officer has been made, or is threatened to be made, a party to an action, suit, or proceeding, whether civil, criminal, administrative, investigative, or otherwise (including an action, suit, or proceeding by or in the right of the corporation), by reason of the fact that the person is or was a Director or officer of the corporation, or a fiduciary within the meaning of the Employee Retirement Income Security Act of 1974 with respect to any employee benefit plan of the corporation, or serves or served at the request of the corporation as a Director or as an officer, or as a fiduciary of any employee benefit plan, of another corporation, partnership, joint venture, trust, or other enterprise; and (b) any liability incurred by him or her, including, without limitation, satisfaction of any judgment, money decree, fine (including any excise tax assessed with respect to any employee benefit plan), penalty or settlement, for which he or she may have become liable in connection with any such action, suit or proceeding, except where it is adjudged that the Director or officer is liable for gross negligence, bad faith or willful misconduct in performing his duties. INDEMNIFICATION UNDER THIS SECTION IS SUBJECT TO ANY AND ALL PROHIBITIONS, RESTRICTIONS AND LIMITATIONS IMPOSED BY LAW.

ARTICLE VIII

AMENDMENT OF BYLAWS

Except as otherwise provided in the Articles of Incorporation, and subject to the power of

the Board to amend or repeal these Bylaws, these Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority vote, provided that written notice setting forth in detail the proposed Bylaws revisions with explanations for the change is given at least three days previously. In the case of an emergency, which must be explained in the notice, two hours notice of a proposed amendment may be given to all Directors, and the Bylaws may be amended upon the unanimous vote of all Directors.

ARTICLE IX MISCELLANEOUS

9.01 FISCAL YEAR: The fiscal year of the Corporation will begin on July 1 of each year and will end on June 30 of the next year.

9.02 ANNUAL REPORT: The Treasurer shall obtain and will provide to the Board no later than 90 days after the close of the fiscal year a report containing the following information in appropriate detail.

- a. The assets and liabilities of the Corporation as of the end of the fiscal year.
- b. The principal changes in assets and liabilities during the fiscal year;
- c. The revenues and receipts, both restricted and unrestricted to particular purposes, for the fiscal year.
- d. The expenses or disbursements, for both general and restricted purposes, during the fiscal year;
- e. The substantial activities and projects begun, in progress, and completed during the Fiscal year.
- f. Such other information as may be requested by the Board.

The report will be accompanied by a report of an independent accountant, or in lieu of such report, the certificate of an authorized officer of the Corporation that such statements were prepared without audit from the books and records of the Corporation.

9.03 FEDERAL TAX FILING: The officers of the Corporation will be responsible for ensuring timely annual filing of IRS Form 990 within the timeframes of IRS rules.

9.04 CONSTRUCTION: Whenever the context requires, the masculine will include the feminine and neuter, and the singular will include the plural, and vice versa. If any portion of these Bylaws is declared invalid or inoperative, then so far as is reasonable the remainder of these Bylaws will be considered valid and operative and effect will be given to the intent manifested by the portion held invalid or inoperative.

9.05 STATUTORY AND OTHER AUTHORITY: These Bylaws are subject to and governed by any applicable federal or state laws and regulations, including pertinent local ordinances and the

Articles of Incorporation.

9.06 WAIVER OF NOTICES: Whenever any notice is required to be given under the provisions of the statutes of the State of North Carolina or the Articles of Incorporation or the Bylaws of this Corporation, a waiver thereof in writing signed by the person or persons entitled thereto, whether before or after the time stated therein, shall be deemed equivalent to the giving of such notice.

9.07 PARLIAMENTARY PROCEDURE: The current edition of Robert's Rules of Order shall be the final source of authority in all questions of parliamentary procedure when such rules are not inconsistent with the Articles of Incorporation or these Bylaws.

ARTICLE X
Distribution of Assets Upon Dissolution

In the event of the dissolution of the Corporation, to the extent allowed under applicable law, all of the assets of the Corporation shall be distributed to, or its assets shall be sold and the proceeds distributed to, one or more qualifying charitable organizations (as hereinafter defined), which shall be selected by the Board of Directors of the Corporation. For purposes of these bylaws, the term "qualifying charitable organization" shall mean a corporation, fund or foundation which is created in the United States, any state or territory, the District of Columbia, or any possession of the United States, organized and operated exclusively for religious, charitable, scientific, literary or educational purposes which then qualifies as exempt from taxation under the provisions of section 501(c)(3) of the Code, is then described in section 170(c)(2) of the Code and is then other than a private foundation pursuant to section 509(a) of the Code. In the event that for any reason upon the dissolution of the Corporation the Board of Directors of the Corporation shall fail to act in the manner herein provided within a reasonable time, the Senior Resident Judge of the Superior Court of Iredell County shall make such distributions as herein provide upon the application of one or more persons who are members of the Executive Board of the Corporation.

ARTICLE XI
Non-discrimination Policy

The Classical Education Schools of North Carolina admits students of any race, color, national origin, and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national origin, and ethnic origin in administration of its educational policies, scholarship and loan programs, and athletic and other school-administered programs.

ARTICLE XII
Adoption

These Bylaws become effective immediately upon approval by the Board of Directors.

*As approved by Unanimous Written Consent of the Board of Directors
dated ___4-28-23_____, pursuant to the BOC.*

**CONFLICT OF INTEREST POLICY
OF
CLASSICAL EDUCATION SCHOOLS OF NORTH CAROLINA**

**Article I
Purpose**

The purpose of the conflict of interest policy is to protect this tax-exempt corporation's (Classical Education Schools of North Carolina, hereinafter the "Corporation") interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Corporation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit corporations and charitable organizations.

**Article II
Definitions**

1. Interested Person. Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest. A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

(a) An ownership or investment interest in any entity with which the Corporation has a transaction or arrangement,

(b) A compensation arrangement with the Corporation or with any entity or individual with which the Corporation has a transaction or arrangement, or

(c) A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Corporation is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Article III
Procedures

1. Duty to Disclose. In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest.

(a) An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

(b) The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

(c) After exercising due diligence, the governing board or committee shall determine whether the Corporation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

(d) If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Corporation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflicts of Interest Policy.

(a) If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

(b) If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

Article IV
Records of Proceedings

The minutes of the governing board and all committees with board delegated powers shall contain:

(a) The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

(b) The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V
Compensation

(a) A voting member of the governing board who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member's compensation.

(b) A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member's compensation.

(c) No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI
Annual Statements

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

- (a) Has received a copy of the conflicts of interest policy;
- (b) Has read and understands the policy;
- (c) Has agreed to comply with the policy; and
- (d) Understands the Corporation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

Article VII
Periodic Reviews

To ensure the Corporation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

- (a) Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.
- (b) Whether partnerships, joint ventures, and arrangements with management organizations conform to the Corporation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

Article VIII
Use of Outside Experts

When conducting the periodic reviews as provided for in Article VII, the Corporation may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

[END]

State of North Carolina
Department of the Secretary of State

ARTICLES OF INCORPORATION
NONPROFIT CORPORATION

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

1. The name of the nonprofit corporation is: Classical Education Schools of North Carolina.

2. (Check only if applicable.) The corporation is a charitable or religious corporation as defined in NCGS §55A-1-40(4).

3. The name of the initial registered agent is: Kevin C. Donaldson.

4. The street address and county of the initial registered agent's office of the corporation is:

Number and Street: 149 Welton Way

City: Mooresville State: NC Zip Code: 28117 County: Iredell

The mailing address *if different from the street address* of the initial registered agent's office is:

Number and Street or PO Box: PO Box 3010

City: Mooresville State: NC Zip Code: 28117-3010 County: Iredell

5. The name and address of each incorporator is as follows:

Name	Address
<u>Kevin C. Donaldson</u>	<u>149 Welton Way Mooresville NC, 28117-9163 United States</u>
<u> </u>	<u> </u>
<u> </u>	<u> </u>

6. (Check either "a" or "b" below.)

a. The corporation will have members.

b. The corporation will not have members.

7. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.

8. Attached are provisions regarding the limitation of activities of the corporation.

9. Any other provisions which the corporation elects to include are attached.

10. The street address and county of the principal office of the corporation is:

Principal Office Telephone Number: (520) 631-7400

Number and Street: 1431 Mecklenburg Hwy

City: Mooresville State: NC Zip Code: 28115-7841 County: Iredell

The mailing address *if different from the street address* of the principal office is:

Number and Street or PO Box:

City: State: Zip Code: County:

11. Principal Office Email Address: Privacy Redaction

12. (Optional): Listing of Officers (See instructions for why this is important)

Name	Address	Title

13. (Optional): Please provide a business e-mail address: Privacy Redaction

The Secretary of State's Office will e-mail the business automatically at the address provided at no charge when a document is filed. The e-mail provided will not be viewable on the website. For more information on why this service is being offered, please see the instructions for this document.

14. These articles will be effective upon filing, unless a future time and/or date is specified:

This is the 27th day of April, 2023.

Incorporator Business Entity Name

Kevin C. Donaldson

Signature of Incorporator

Kevin C. Donaldson Incorporator

Type or print Incorporator's name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

Purpose of Corporation

The corporation is organized for the following purpose(s): (check all that apply):

- Religious
- Charitable
- Educational
- Testing for public safety
- Scientific
- Literary
- Fostering national or international amateur sports competitions, and/or
- Prevention of cruelty to children or animals.

The Dissolution Clause

Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

The Limitation of Activities Clause

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in these Articles. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.



NORTH CAROLINA

Department of the Secretary of State

To all whom these presents shall come, Greetings:

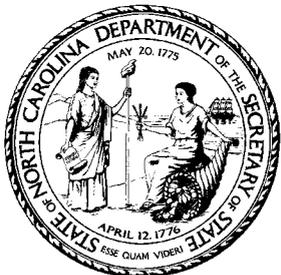
I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

ARTICLES OF INCORPORATION

OF

CLASSICAL EDUCATION SCHOOLS OF NORTH CAROLINA

the original of which was filed in this office on the 28th day of April, 2023.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 28th day of April, 2023.

Elaine F. Marshall

Secretary of State

State of North Carolina
Department of the Secretary of State

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NONPROFIT CORPORATION

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

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Name	Address
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<u></u>	<u></u>
<u></u>	<u></u>

6. (Check either "a" or "b" below.)

a. The corporation will have members.

b. The corporation will not have members.

7. Attached are provisions regarding the distribution of the corporation's assets upon its dissolution.

8. Attached are provisions regarding the limitation of activities of the corporation.

9. Any other provisions which the corporation elects to include are attached.

10. The street address and county of the principal office of the corporation is:

Principal Office Telephone Number: (520) 631-7400

Number and Street: 1431 Mecklenburg Hwy

City: Mooreville State: NC Zip Code: 28115-7841 County: Iredell

The mailing address *if different from the street address* of the principal office is:

Number and Street or PO Box: _____

City: _____ State: _____ Zip Code: _____ County: _____

11. Principal Office Email Address: Privacy Redaction

12. **(Optional):** Listing of Officers (See instructions for why this is important)

Name	Address	Title

13. **(Optional):** Please provide a business e-mail address: Privacy Redaction.

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14. These articles will be effective upon filing, unless a future time and/or date is specified: _____

This is the 27th day of April, 2023.

Incorporator Business Entity Name

Kevin C. Donaldson

Signature of Incorporator

Kevin C. Donaldson Incorporator

Type or print Incorporator’s name and title, if any

NOTES:

1. Filing fee is \$60. This document must be filed with the Secretary of State.

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- Religious
- Charitable
- Educational
- Testing for public safety
- Scientific
- Literary
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Upon the dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not so disposed of shall be disposed of by a Court of Competent Jurisdiction of the county in which the principal office of the corporation is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

The Limitation of Activities Clause

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to its members, trustees, officers, or other private persons, except that the corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in these Articles. No substantial part of the activities of the corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the corporation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

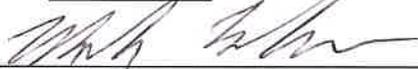
Notwithstanding any other provision of these articles, the corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code, or the corresponding section of any future federal tax code, or (b) by a corporation, contributions to which are deductible under section 170(c)(2) of the Internal Revenue Code, or the corresponding section of any future federal tax code.

Signature Page

The foregoing application is submitted on behalf of Mark Lockman. The undersigned has read the application and hereby declares that the information contained in it is true and accurate to the best of his/her information and belief. The undersigned further represents that the applicant has read the Charter School Law and agrees to be governed by it, other applicable laws, and SBE regulations. Additionally, we understand the final approval of the charter is contingent upon successful completion of a mandatory planning year. Per SBE policy "Planning Year for New and Preliminary Charter Schools – CHTR 013, 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: _____ Mark Lockman

Board Position: _____ Board Chair

Signature: 

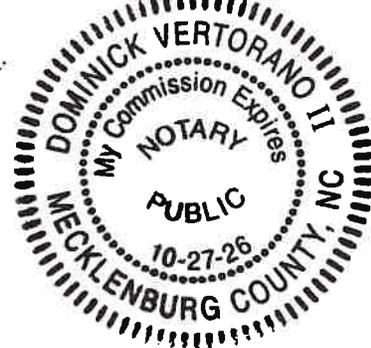
Date: 4/15/2024

Sworn to and subscribed before me this 15 day of April, 2024.

Notary Public: 

My commission expires: October 27, 2026.

Official Seal:





Joe Higgins <sportsbuzzjoe@gmail.com>

Fwd: Pay.gov Payment Confirmation: Form 1023

1 message

Joe Higgins <joe@joehigginsinc.com>
To: Nathan Fosnough <nathanfosnough@jcdwlaw.com>

Wed, Jan 31, 2024 at 1:14 PM

Looks like it went through

----- Forwarded message -----

From: <notification@pay.gov>
Date: Wed, Jan 31, 2024, 1:13 PM
Subject: Pay.gov Payment Confirmation: Form 1023
To: <joe@joehigginsinc.com>



An official email of the United States government



You successfully submitted your Form 1023 user fee payment to Pay.gov and the details are below. You can expect to be contacted about your application by the IRS within 180 days from the date you submitted it. After 180 days, if you haven't been contacted, you can call the toll-free Customer Account Services number, Monday through Friday, 8 a.m. - 5 p.m. (local time), at 877-829-5500 to check on the status. You will need to provide your name, your employer identification number (EIN), and the date you submitted your application when calling.

Application Name: Form 1023
Pay.gov Tracking ID: 27BFOFAO
Agency Tracking ID: 76622117637
Transaction Type: Sale
Transaction Date: 01/31/2024 03:12:58 PM EST
Account Holder Name: JONES CHILDERS DONALDSON & WEBB
Transaction Amount: \$600.00
Card Type: Visa
Card Number: *****3383

THIS IS AN AUTOMATED MESSAGE. PLEASE DO NOT REPLY.



Pay.gov is a program of the U.S. Department of the Treasury, Bureau of the Fiscal Service

Mt Mourne School
FUNDAMENTAL LEASE PROVISIONS

Date of Lease: January 1, 2024

Property: The real property located at 1431 Mecklenburg Hwy, Mooresville, NC 28115.

Leased Premises: The area depicted in Exhibit "A" Site Plan, and Exhibit "A1" Floor Plan, containing the following approximate measurements 60,268 sq. ft.

Landlord: Langtree Gorup, L.L.C.

Tenant: Classical Charter Schools of North Carolina, dba, Trinitas Classical Academy

Lease Term: Ten (10) full lease years

Estimated Date of Possession: January 1, 2025

Rent Commencement Date: September 1, 2025

Minimum Monthly Base Rent: \$36,989.96

Tenant's estimated monthly cost of Property Taxes: \$ 916.00 (est). Total estimated monthly share of Property Insurance: \$484.67. Total estimated monthly rent, including the prevailing transaction privilege tax: \$38,774.54 (Minimum monthly rent, property taxes, property insurance and 1% transaction privilege tax subject to change).

Address for Payment of Rent: Langtree Group, L.L.C. 331 Alcove Road, Suite 300, Mooresville, NC 28117.

Security Deposit: \$ 36,989.96

Use of Leased Premises: Charter School

Tenant's Trade Name: Trinitas Classical Academy

Address for Notices:

Landlord: Langtree Group LLC

Tenant: Trinitas Classical Academy

The following exhibits are attached hereto and made a part hereof:

- Exhibit "A" - Floor Plan
- Exhibit "A1" Floor Plan
- Exhibit "B" – Guaranty of Lease Agreement

The Fundamental Lease Provisions are an integral part of this Lease and each reference in this Lease to any of the Fundamental Lease Provisions shall be construed to incorporate all of the terms provided under each such Fundamental Lease Provision. In the event of any conflict between any Fundamental Lease Provision and the balance of the Lease, the latter shall control. References to specific sections are for convenience and designate some of the sections where references to the particular Fundamental Lease Provisions appear.

LANDLORD

Langtree Group, L.L.C.

Rick Howard, Managing Member Date

TENANT

**Classical Education Schools of North Carolina, dba
Trinitas Classical Academy, Inc.**

Mark Lockman Date

BUILDING LEASE NO. _____

LEASE

1. PARTIES: This Lease, dated for reference purposes only, January 1, 2025 is made by and between Langtree Groups, LLC, a North Carolina limited liability company, herein called Landlord, and Trinitas Classical Academy., a to be formed North Carolina nonprofit corporation, herein called Tenant.

2. PREMISES: Landlord hereby Leases to Tenant and Tenant leases from Landlord for the term, at the rental, and upon all the conditions set forth herein, the Premises located in that certain building (“Building”) situated in 1431 Mecklenburg Hwy, Mooresville, NC 28115 .

3. TERM:

3.1 Term: The term of this Lease shall be for ten years (10) years, commencing January 1, 2025 and ending on December 31, 2035, unless sooner terminated pursuant to any provision herein.

3.2 Possession: Notwithstanding anything contained herein, possession shall be given to Tenant on or before January 1, 2025, or sooner upon completion of maintenance and repairs to property being completed by Imagine Schools (the Possession Date).

3.3 Delay In Commencement: Notwithstanding said commencement date, if for any reason Landlord cannot deliver possession of the Premises to Tenant by said Commencement Date, Landlord shall not be subject to any liability therefore, nor shall failure affect the validity of this Lease or the obligations of Tenant hereunder or extend the term hereof, but in such case Tenant shall not be obligated to pay rent or begin construction of any Tenant improvements, until possession of the Premises is tendered to Tenant; provided, however, that if Landlord shall not have delivered possession of the Premises within forty five (45) days from said commencement date, Tenant may, at Tenant's option, by notice in writing to Landlord within fifteen (15) days thereafter, cancel this Lease, in which event the parties shall be discharged from all obligations hereunder. If Tenant occupies the Premises prior to said Commencement date, such occupancy shall be subject to all provisions hereof; such occupancy shall not advance the termination date, and Tenant shall pay rent for such period at the initial monthly rates set forth below. If Landlord, by reason outside the reasonable control of Landlord, cannot deliver said Premises on said Commencement date, Landlord may, at Landlord's option, by notice in writing within ten (10) days prior to the Commencement date, cancel this Lease. The parties hereto acknowledge that certain obligations under various Paragraphs hereof may commence prior to the lease term, i.e. construction, hold harmless liability insurance, etc.; and the parties agree to be bound by these Paragraphs prior to Commencement of the Lease term.

3.4 Option to Renew: Landlord grants to Tenant an option to renew this Lease Agreement for one (1), additional term of ten (10) years, hereinafter referred to as the Option Period, after expiration of the Original Term of this Lease Agreement. The Option Period, if exercised, shall be under the same terms and conditions as contained in this Lease Agreement at the then current rental rate plus 10%. Tenant shall exercise its option(s) to extend the term of the lease by giving Landlord written notice of such exercise no later than one hundred twenty (120) days prior to the expiration of the then current period. Failure to exercise any Option Period shall extinguish any right to exercise subsequent Option Periods granted hereunder.

4. RENT:

4.1 Minimum Base Rent: Tenant shall pay to Landlord at the address designated for the payment of rent as set forth in the Fundamental Lease Provisions, or at such other place as may be designated by Landlord, without prior demand therefore, and without any deduction or offset whatsoever, and as initial fixed minimum rent (subject to adjustment as set forth in Paragraph 9 hereof) the amount set forth and designated as minimum annual rent in the Fundamental Lease Provisions, each calendar year, payable monthly, in advance, in the amount as set forth in the Fundamental Lease Provisions as Minimum Monthly Rent (subject to adjustments as set forth in Paragraph 9).

4.2 Taxes and Insurance Expenses: Commencing upon the Rental Commencement Date, and for the balance of the Term, Tenant shall pay to Landlord amounts designated herein as real property taxes and insurance expenses pertaining to the entire Premises, in the manner set forth in paragraphs 8.2, 10.2, 10.3 and 10.4. Said amounts shall mean all real property taxes levied and the cost to Landlord of insurance carried by Landlord pursuant to Paragraphs 8.2, 10.2, 10.3 and 10.4, on the Premises. During any portion of the Term which is less than a full taxable fiscal year or less than a full period for which Landlord has obtained such insurance, Tenant's obligation for such real property taxes and insurance expenses shall be prorated on a daily basis.

4.3 TENANT IMPROVEMENT, FIXTURES, FURNITURE AND EQUIPMENT ALLOWANCE: Landlord shall provide Tenant with a Tenant Improvement, Fixtures, Furniture and Equipment Allowance (the "TIFFE Allowance") of up to Seven Hundred Thousand and no/100 Dollars (\$700,000) for Qualifying Expenses Tenant incurs in connection with the Tenant's Work, and purchase of any Fixtures, Furniture and Equipment (FF&E) of and within the Premises as set forth below. Prior to Tenant commencing any work or completing any purchases of FF&E, Tenant shall provide Landlord with a copy of Tenant's approved contract with Tenant's General Contractor or vendor. Any General Contractor must be licensed in the State of North Carolina, and provide course of construction insurance. Landlord shall reasonably approve Tenant's scope of work and General Contractor. Any purchase of FF&E shall be made in the name of Landlord and the Landlord shall retain all rights title and interest in all FF&E purchased for the benefit of Tenant.

The Parties acknowledge the TI Allowance shall be paid to Tenant by Landlord as a reimbursement in accordance with the following provisions:

a. Application for Reimbursement: Tenant may request a partial disbursement of the TIFFE Allowance in progress payments based on reimbursement applications from Tenant for costs previously incurred by Tenant for Tenant's Work or Tenant's FF&E purchases. Each TIFFE Allowance reimbursement request (the "Reimbursement Request") shall separately specify: (a) the specific Qualifying Expenses for which the Reimbursement Request is requested, (b) the quantity and price of each item purchased, (c) the cost of all contracted labor or other services applicable to Tenant's Work or purchase for which such request for disbursement is made. Each Reimbursement Request shall include copies of invoices for all items or materials purchased and all contracted labor or services provided, and each Reimbursement Request shall include evidence satisfactory to Landlord of Tenant's payment to its Contractor and/or vendor other service providers of all such amounts. With each such Reimbursement Request, Tenant shall certify that all Tenants Work has been made in accordance with applicable laws and have been completed in a manner satisfactory and acceptable to Landlord, and municipal authority.

b. Reimbursement Request: Until the TIFFE Allowance is completely paid, Landlord shall disburse each approved Reimbursement Request within five (5) days of receipt of the Reimbursement Request upon satisfaction of all of the following conditions precedent: (a) Landlord's reasonable satisfaction that the Tenant's Work completed as of the date of disbursement has an aggregate value at least equal to the aggregate amount of proceeds then to be disbursed (b) Landlord's determination after inspection of the Tenant's Work for which the Reimbursement Request is being made that said work was done in a good and workmanlike manner in conformance with the approved plans and specifications and applicable ordinances, or Landlord's determination that such purchase is in conformance with the applicable Qualified Expense list.

1. Landlord and Tenant agree that the final \$50,000 Reimbursement Request shall not be due or payable until Tenant has provided Landlord with (a) a copy of its final Certificate of Occupancy, (b) final unconditional lien releases from Tenant's Contractor and any suppliers or subcontractors who have filed preliminary lien notices, and (c) Tenant's façade signage has been installed on the Premises and Tenant has opened for business in the Premises.

2. Tenant acknowledges that the TIFFE Allowance shall not apply to any of the following: (a) any cost of Tenant's Work in excess of the TIFFE Allowance, after the TIFFE Allowance amount has been fully drawn; and (b) any Non-Qualifying Expenses (as defined below).

3. The following items ("Non-Qualifying Expenses") are the responsibility of

Tenant to specify and install, at its sole cost and expense, and will not be reimbursed by Landlord through the TIFFE Allowance or otherwise.

1. Consulting or professional fees paid to consultants, accountants or advisors other than the licensed architect and engineer engaged pursuant to a contract to provide their services to Tenant for Tenant's Work at the Premises.
2. Travel and related business expense for Tenant and its principals.
3. The cost of paper goods, food, inventory and related consumables.
5. Fees to employment agencies or costs related to staffing the business.
6. Legal fees of any kind or nature.
7. Liability insurance.
8. Auto expenses.
10. Interest or fees on any bank loan, partnership loan, or other financing source that is originated by Tenant in connection with the Premises.
11. Any construction change order to the Tenant's Plans after Landlord's review and approval of Tenant's Plans (unless pre-approved by Landlord in its reasonable discretion).
12. Contractor's bond, if any.

c. Qualifying Expenses:

Phone	\$ 22,000.00
Paging System	\$ 25,000.00
Security Server, software & Licensing	\$ 11,000.00
Epson Projectors	\$ 46,820.00
Installation	\$ 7,000.00
Start Up Related -Textbooks	\$ 184,000.00
Furniture and Fixtures – Start Up	\$ 244,890.00
Bleachers (Optional)	\$ 20,000.00
Texturing/Repairs	\$ 26,590.00
Play Systems	\$ 49,700.00
Flooring/covebase	\$ 63,000.00
	\$ 700,000.00

5. SECURITY DEPOSIT: Tenant shall deposit with Landlord upon execution hereof \$ 0 as security for Tenant's faithful performance of Tenant's obligations hereunder. If Tenant fails to pay rent or other charges due hereunder, or otherwise defaults with respect to any provision of this Lease, Landlord may use, apply, or retain all or any portion of said deposit for the payment of any rent or other charge in default or for the payment of any other sum to which Landlord may become obligated by reason of Tenant's default, or to compensate Landlord for any loss or damage which Landlord may suffer thereby. If Landlord so uses or applies all of any portion of said deposit, Tenant shall within ten (10) days after written demand thereof deposit cash or cashier's check with Landlord in an amount sufficient to restore said deposit to the full amount hereinabove stated, and Tenant's failure to do so shall be a material breach of this Lease. Landlord shall not be required to keep said deposit separate from its general accounts. If Tenant performs all of Tenant's obligations hereunder, said deposit, or so much thereof as has not theretofore been applied by Landlord, shall be returned, without payment of interest or other increment for its use, to Tenant or, at Landlord's option, to the last assignee, if any, of Tenant's interest hereunder at the expiration of the term hereof, and within thirty (30) days after Tenant has vacated the Premises.

6. USE:

6.1 Use: The Premises shall be used and occupied only for a charter school and for no other purpose. Tenant shall not use, or permit to be used, the Premises or any part thereof, for any purpose or purposes other than the purpose or purposes for which said Premises are hereby leased; and no use shall be made or permitted to be made of said Premises, which will increase the existing rate of insurance upon the building in which said Premises may be located, or cause a cancellation of any insurance policy covering said building, or any part thereof, nor shall Tenant sell, or permit to be kept, used, or sold, in or about said Premises, any article which may be prohibited by standard form of fire insurance policies.

6.2 Compliance with Law: Tenant shall at Tenant's expense, comply promptly with all applicable statutes, ordinances, rules, regulations, orders, and requirements in effect during any part of the term hereof regulating the use by Tenant of the Premises. Tenant shall not use or permit the use of the Premises in any manner that will tend to create waste or a nuisance or, if there shall be more than one Tenant of the building containing the Premises, which shall tend to disturb such other tenants.

6.3 Condition of Premises: Tenant hereby accepts the Premises in their condition existing as of the date of the execution hereof, subject to all applicable zoning, municipal, county and state laws, ordinances, and regulations governing and regulating the use of the Premises, and accepts this Lease subject thereto and to all matters disclosed thereby and by any exhibits attached hereto. Except as otherwise stated in this Lease, Tenant hereby acknowledges that neither the Landlord nor any employees or agents of Landlord has made any oral or written warranties or representations to Tenant relative to the condition or use by Tenant of said Premises and Tenant acknowledges that Tenant assumes all responsibility regarding the Occupational Safety Health Act, the legal use and adaptability of the Premises and the compliance thereof with all applicable laws and regulations in effect during the term of this Lease except as otherwise specifically stated in this Lease.

7. MAINTENANCE, REPAIRS AND ALTERATIONS:

7.1 **Tenant's obligations:**

(a) Subject to the provisions of Section 12, "Destruction of Premises", and Section 17, "Condemnation", of this Agreement, Tenant shall, at Tenant's sole cost and expense and at all times, keep the non-structural parts of the Premises and every part thereof in good condition and repair, (whether or not such portion of the Premises requiring repairs, or the means of repairing the same, are reasonably or readily accessible to Tenant, and whether or not the need for such repairs occurs as a result of Tenant's use, any prior use, the elements or the age of such portion of the Premises), including but not limited to all equipment or facilities serving the Premises, such as plumbing, heating, air conditioning, ventilating, electrical, lighting facilities, boilers, fired or unfired pressure vessels, fire sprinkler and/or standpipe and hose or other automatic fire extinguishing system, including fire alarm and/or smoke detection systems and equipment, fire hydrants, fixtures, walls (interior and exterior), ceilings, roofs, floors, windows, doors, plate glass, skylights, landscaping, driveways, parking lots, fences, retaining walls, signs, sidewalks and parking lots located on, about, or adjacent to the Premises.

(b) Tenant, in keeping the Premises in good order, condition and repair, shall exercise and perform good maintenance practices. Tenant's obligations shall include restorations, replacements or renewals, on non-structural parts, when necessary to keep the Premises and all improvements thereon or a part thereof in good order, condition and state of repair. If Tenant occupies the Premises for seven (7) years or more, Landlord may require Tenant to repaint the exterior of the buildings on the Premises, but not more frequently than once every seven (7) years. Landlord shall obtain, at Landlord's sole expense, a professionally prepared paint analysis which analysis indicates the need of repainting the exterior of the buildings. Tenant shall not be required to repaint the building within the last two (2) years of the Lease.

(c) Tenant shall, at Tenant's sole cost and expense be responsible for maintenance directly or procure and

maintain contracts with licensed contractors specializing and experienced in the inspection, maintenance and service of the following equipment and improvements, if any, located on the Premises: (i) heating, air conditioning and ventilation equipment, (ii) boiler, fired or unfired pressure vessels, (iii) fire sprinkler and/or standpipe and hose or other automatic fire extinguishing systems, including fire alarm and/or smoke detection, (iv) landscaping and irrigation systems, (v) roof covering and drain maintenance, (vi) back flow prevention systems, and (vii) asphalt and parking lot maintenance. Any third party contracts maintained by Tenant shall be made available for review by Landlord at Landlord's request. All maintenance shall be in compliance with all construction warranties, which shall be delivered to Tenant within ten (10) days after execution by both parties to this Lease, and Tenant shall be responsible for the performance of any inspection and maintenance required to keep any construction warranty in effect. Tenant shall have the roof inspected at least every 24 months.

7.2 Alterations and Additions.

(a) Tenant shall not, without Landlord's prior written consent make any alterations, improvements or additions in, on or about the Premises unless such alterations, improvements or additions are required by any legal authority pertaining to Tenant's ability to legally operate a charter school, pre-school and/or day-care facility, in which case the specifically required alterations, improvements or additions by the legal Authority requiring such shall not require the prior written consent of Landlord. Landlord may require that Tenant, at Tenant's expense, remove any or all of said alterations, improvements, or additions at the expiration of the term, and restore the Premises to their prior condition. Should Tenant make any alterations, improvements, or additions without the prior approval of Landlord, excepting those as outlined above in the preceding sentence that do not require Landlord's prior written consent, Landlord may require that Tenant remove the same. Anything herein contained to the contrary notwithstanding, Tenant shall not drill, punch or otherwise cause any crack, hole, opening or other break in the roof, or roof area, or roof supports, or in the floors, on the walls, or in other permanent areas or structures without first receiving the prior written consent of Landlord, accepting the installation of any routine chalkboards, projectors, and day to day equipment used in the normal operation of a school.

(b) Any alterations, improvements, or additions in, or about the Premises that Tenant shall desire to make and which requires the consent of the Landlord shall be presented to Landlord in written form, with proposed detailed plans. If Landlord shall give its consent the consent shall be deemed conditioned upon Tenant acquiring a permit to do so from appropriate government agencies, the furnishing of a copy thereof to Landlord prior to the commencement of the work and the compliance by Tenant of all conditions of said permit in a prompt and expeditious manner. In addition, Landlord may require Tenant to provide Landlord, at Tenant's sole cost and expense, a lien and completion bond in an amount equal to one and one-half times the estimated costs of such improvements, to insure Landlord against any liability for mechanic's and materialmen's liens and to insure completion of the work. Additionally, upon the expiration or termination of this Lease, if so requested by Landlord, Tenant shall immediately, at its expense, remove all tenant improvements and modifications to the Premises not wanted by Landlord, and shall return the Premises to the condition in which they were prior to the improvement or modification, so removed.

(c) Tenant shall pay, when due, all claims for labor or materials furnished to or for Tenant at or for use in the Premises, which claims are or may be secured by any mechanics' or materialmen's lien against the Premises or any interest therein. Tenant shall give Landlord not less than ten (10) days' notice prior to the commencement of any work in the Premises, and Landlord shall have the right to post notices of non-responsibility in or on the Premises as provided by law. If Tenant shall, in good faith, contest the validity of any such lien, claim or demand, then Tenant shall, at its sole expense defend itself and Landlord against the same and shall pay and satisfy any such adverse judgment that may be rendered thereon before the enforcement thereof against the Landlord or the Premises, upon the condition that if Landlord shall require, Tenant shall furnish to Landlord a surety bond satisfactory to Landlord in an amount equal to such contested lien, claim or demand indemnifying Landlord against liability for the same and holding the Premises free from the effect of such lien or claim. In addition, Landlord may require Tenant to pay Landlord's attorney's fees and costs in participating in such action if Landlord shall decide it is to its best claim to do so.

(d) Unless Landlord requires their removal, as set forth in Paragraph 7.2(a) or Paragraph 7.2(b), all alterations, improvements, and additions which may be made on the Premises, shall become the property of Landlord

and remain upon and be surrendered with the Premises at the expiration of the term, or on sooner termination thereof.

7.3 **Landlord's Obligations:** Except for the provisions of Section 12, "Destruction Of Premises", and Section 17, "Condemnation", of this Agreement, Landlord shall repair the structural portions of the leased premises, including the structural portions of the walls, roof, and utility connections unless such replacements are caused in whole or in part by the act, neglect, fault, or omission by Tenant, its agent, servants, employees, invitees, or any damage caused by breaking and entering, in which case Tenant shall make such repairs.

8. INSURANCE AND INDEMNITY:

8.1 **Liability Insurance:** Tenant shall at Tenant's expense, obtain and keep in force during the term of this Lease a policy of comprehensive public liability insurance insuring Landlord and Tenant against any liability arising out of the ownership, use, occupancy, or maintenance of the Premises. Such insurance policy or policies, naming Landlord, Tenant and **Langtree Group Properties Corporation** as named insured, shall be carried and maintained on the minimum basis of One Million Dollars (\$1,000,000) each occurrence and Two Million Dollars (\$2,000,000) aggregate for Bodily Injury and Property Damage combined, and Tenant shall deliver to Landlord the certificate of each insurance carrier as to each such insurance policy prior to commencement of the term hereof, and thereafter at least thirty (30) days prior to the expiration of any such policy. In the event the terms of this Lease shall permit the sale of alcoholic beverages from or on the Leased Premises, such insurance as carried by Tenant hereunder shall include liquor legal/dram shop liability insurance.

All insurance required of Tenant shall be issued as a primary policy by an insurance company authorized to do business in the State of North Carolina with a Best's minimum policyholder rating of "A" status or better and a Best's financial category minimum rating of Class XI status or better as rated in the most recent edition of Best's Insurance Reports, or as otherwise approved by Landlord in the event such rating system shall be modified or discontinued.

8.2 **Fire Insurance:** During the term hereof, Landlord shall keep the buildings and improvements within which the Leased Premises are located, insured against loss or damage by fire, with extended coverage and vandalism and malicious mischief endorsement or their equivalents, in such insurance companies as Landlord shall select and in amounts not less than eighty percent (80%) of the replacement cost of the building and structures insured, with loss payable thereunder to Landlord and to any authorized encumbrance of Landlord (with standard mortgagee loss payable clause) in accordance with their respective interests.

Tenant shall reimburse Landlord, for the insurance carried hereunder. Tenant shall pay Landlord each calendar month of the term hereof, in advance, a sum equal to an amount estimated by Landlord, and of which Tenant has been given notice, to be 1/12th of Tenant's annual insurance premium for the Building. Tenant shall further pay to Landlord the entire amount of the increase, if any, in insurance rates which are caused in whole or in part by Tenant's use of the Leased Premises over the lowest rate obtainable by Landlord within the Building. Landlord may, at Landlord's option and at Landlord's sole cost, maintain rent insurance for the benefit of Landlord, equal to at least one year's rent hereunder. If the Lease is terminated as a result of damage by fire or casualty as set forth in Paragraph 12 hereof, all insurance proceeds shall be paid to and retained by Landlord, subject to the rights of any authorized encumbrance of Landlord. Tenant may carry a reasonable deductible subject to Landlord's consent, which consent will not be unreasonably withheld, delayed or conditioned, and Tenant may insure through a blanket policy.

If the Premises being leased herein are part of a larger property, then Tenant shall not be responsible for paying any increase in the property insurance caused by the acts or omissions of any other Tenant of the building in which the Premises are a part.

8.3 **Insurance Policies:** Tenant shall deliver to Landlord copies of policies of liability insurance required under Paragraph 8.1 or certificates evidencing the existence and amounts of such insurance with loss payable clauses satisfactory to Landlord. Each insurance policy shall contain a clause that it cannot be canceled or reduced in scope without thirty (30) days prior written notice to Landlord and to any mortgagee or trust deed holder of the interest of Landlord hereunder of whom the insurer has been notified in writing. Tenant shall, within ten (10) days prior to the expiration of such policies, furnish Landlord with renewals or "binders" thereof, or Landlord may order such insurance

and charge the cost thereof to Tenant, which amount shall be payable by Tenant upon demand. Tenant shall not do or permit to be done anything which shall invalidate the insurance policies referred to in Paragraph 8.2.

8.4 Waiver of Subrogation: Tenant and Landlord each hereby waives any and all rights of recovery against the other, or against the officers, employees, agents and representatives of the other, for business interruption or for loss of or damage to such waiving party or its property or the property of others under its control, where such business interrupting loss or damage is insured against under any insurance policy in force at the time of such business interrupting loss or damage. Tenant and Landlord shall, upon obtaining the policies of insurance required hereunder, give notice to the insurance carrier or carriers that the foregoing mutual waiver of subrogation is contained in this Lease.

8.5 Indemnity: Tenant shall indemnify and hold harmless Landlord from and against any and all claims arising from Tenant's use of the Premises, or from the conduct of Tenant's business or from any activity, work or things done, permitted or suffered by Tenant in or about the Premises or the common areas and shall further indemnify and hold harmless Landlord from and against any and all claims arising from any breach or default in the performances of any obligation on Tenant's part to be performed under the terms of this Lease, or arising from any negligence of the Tenant, or any of the Tenant's agents, contractors, or employees, and from and against all costs, attorney's fees, expenses and liabilities incurred in the defense of any such claim or any action or proceeding brought thereon, and in case any action or proceeding be brought against Landlord by reason of any such claim, Tenant upon notice from Landlord shall defend the same at Tenant's expense. Tenant, as a material part of the consideration to Landlord, hereby assumes all risk of damage to property or injury to persons, in, upon or about the Premises arising from any cause and Tenant hereby waives all claims in respect thereof against Landlord.

8.6 Exemption of Landlord from Liability: Unless caused by Landlord's willful misconduct or negligence, Tenant hereby agrees that Landlord shall not be liable for injury to Tenant's business or any loss of income therefrom or for damage to the goods, wares, merchandise or other property of Tenant, Tenant's employees invitees, customers, or any other person in or about the Premises or in the common areas, nor shall Landlord be liable for injury to the person of Tenant, Tenant's employees, agents or contractors, whether such damage or injury is caused by or results from fire, steam, electricity, gas, water or rain, or from the breakage, leakage, obstruction or other defects of pipes, sprinklers, wires, appliances, plumbing, air conditioning or lighting fixtures, or from any other cause, whether the said damage or injury results from conditions arising upon the Premises or upon other portions of the building of which the Premises are a part, or from other sources or places, and regardless of whether the cause of such damage or injury or the means of repairing the same is inaccessible to Tenant. Landlord shall not be liable for any damages arising from any act or neglect of any other Tenant, if any, of the building in which the Premises are located.

9. RENTAL INDEX: Following the expiration of the third lease year, in lieu of a consumer price index, Tenant shall reconcile each year's student enrollment pursuant to the Basic Calculations for Equalization Assistance as prescribed by the North Carolina Department of Education for Charter Schools. Providing such form continues to be the method on which the State determines the reimbursement the school receives for its student enrollment, this form shall be used for reporting the annual student enrollment. In the event the rental paid under this lease during the specific school year is less than the rental that would have been paid based on calculating eighteen percent (18%) of the Equalization Base/ Assistance, then Tenant shall make an additional payment Landlord equal to the difference. In any event, the rent shall be based at a floor of \$38,774.54 per month during the initial lease term and increase equal to 15% of the schools Average Daily Membership per pupil funding from the State of North Carolina. This rent amount will cap at \$75,000 per month. This percentage rent arrangement will adjust year by year based on revenue estimates, audited financial reports submitted to the State of North Carolina.

10. TAXES:

10.1 Definition of Real Property Tax: As used herein, the term "real property tax" shall include any form of assessment, license fee, levy, penalty, or tax (other than inheritance or estate taxes), imposed by any authority having the direct or indirect power to tax, including any city, county, state or federal government, or any school, agricultural, lighting, drainage or other improvement district thereof, as against any legal or equitable interest of Landlord in the Premises or in the real property of which the Premises are a part, or any tax imposed in substitution, partially or totally,

of any tax previously included within the definition of real property tax, or any additional tax the nature of which was previously included within the definition of real property tax.

10.2 Leased Premises: In addition to the rent and other sums due hereunder, Tenant shall pay and discharge, along with the monthly rent payment set forth above, all taxes and fees assessed as defined in paragraph 10.1, upon all or any portion of, or in relation to, the Leased Premises, the land thereunder, the building and improvements within which the same are located, and the appurtenances or use thereof, or upon any leasehold estate (only as it pertains to any taxable event or liability on or to Tenant) in the Leased Premises, or measured by the rent from the Leased Premises; provided, however, that in the year in which the term hereof shall commence and in the year in which it shall expire, such taxes, assessments, impositions and other charges shall be prorated between Landlord and Tenant. If the Leased Premises are not separately assessed, then the taxes, assessments and other charges shall be apportioned according to the floor area in the Leased Premises in relation to total floor area of all buildings included in the assessment. Landlord shall have the right to collect and impound such taxes, assessments, impositions and charges and Tenant shall pay the same on a monthly basis, in advance, for Tenant's account based upon Landlord's reasonable estimate of the amount thereof next due, and Tenant shall pay to Landlord such tax impounds upon the basis and at the times hereinbefore described. Landlord has attempted to make a reasonable estimate and Landlord makes no warranty or representation as to the accuracy thereof and Landlord shall have no liability therefore should said estimate not be accurate. At the end of each calendar year, the actual charges as stated above shall be reported by Landlord to Tenant. If Tenant's share of such charges for any calendar year exceeds the amount paid by Tenant to Landlord, Tenant shall reimburse Landlord the deficiency within ten (10) days after receipt of such notice; provided, however, if Tenant's share for any calendar year is less than said amount, Landlord shall promptly refund the difference to Tenant, without liability for interest therefore. At the end of each calendar year, the monthly payment to be made by Tenant shall be adjusted so that said monthly payment for the next calendar year will be equal to an amount reasonably estimated by Landlord to be 1/12th of Tenant's annual charges as provided hereinabove.

Landlord shall not be required to pay any interest on such impounds. Tenant hereby agrees to protect and hold harmless Landlord and the Leased Premises from all liability for Tenant's responsibility to pay all such taxes, assessments and charges together with any interest, penalties, or other charges hereby imposed, and from any sale or other proceedings to enforce payment thereof.

10.4 Personal Property Taxes:

(a) Tenant shall pay prior to delinquency all taxes assessed against and levied upon trade fixtures, furnishings, equipment and all other personal property of Tenant contained in the Premises or elsewhere.

(b) If any of Tenant's said personal property shall be assessed with Landlord's real property, Tenant shall pay Landlord the taxes attributable to Tenant within 10 days after receipt of a written statement setting forth the taxes applicable to Tenant's property.

10.5 Transaction Privilege Tax: Tenant shall pay at the time of and in addition to the rent, as additional rent, any sales, rental, occupancy, transaction privilege tax or other like tax imposed upon the rent or other payments paid by Tenant under this Lease by any government authority pursuant to any present or future law.

10.6 Property Valuation Appeals: Landlord reserves the right to protest the valuation for all or a part of the entire complex, including Tenant's proportionate share and Tenant agrees to pay on a pro rata basis as set forth in this Lease Agreement any costs, fees, legal or consulting, incurred as a result of Landlord's protest of valuation.

11. INTENTIONALLY OMMITTED

12. DAMAGE OR DESTRUCTION:

12.1 Partial Damage-Insured: Subject to the provisions of Paragraphs 12.3 and 12.4, if the Premises are damaged and such damage was caused by a casualty covered under an insurance policy required to be maintained and pursuant to Paragraph 8.2, Landlord shall at Landlord's expense repair such damage as soon as reasonably possible and

this Lease shall continue in full force and effect but Landlord shall not repair or replace Tenant's fixtures, equipment or tenant improvements.

12.2 Partial Damage-Uninsured: Subject to the provisions of Paragraphs 12.3 and 12.4, if at any time during the term hereof the Premises are damaged, except by a negligent or willful act of Tenant (in which event Tenant shall make the repairs, at its expense) and such damage was caused by a casualty not covered under an insurance policy required to be maintained pursuant to Paragraph 8.2, Landlord may at Landlord's option either (i) repair such damage as soon as reasonably possible at Landlord's expense, in which event this Lease shall continue in full force and effect, or (ii) give written notice to Tenant within thirty (30) days after the date of the occurrence of such damage of Landlord's intention to cancel and terminate this Lease as of the date of the occurrence of such damage. In the event Landlord elects to give such notice of Landlord's intention to cancel and terminate this Lease, Tenant shall have the right within ten (10) days after the receipt of such notice to give written notice to Landlord of Tenant's intention to repair such damage at Tenant's expense, without reimbursement from Landlord, in which event this Lease shall continue in full force and effect, and Tenant shall proceed to make such repairs as soon as reasonably possible. If Tenant does not give such notice within such 10-day period, this Lease shall be canceled and terminated as of the date of the occurrence of such damage.

12.3 Total Destruction: If at any time during the term hereof the Premises are totally destroyed from any cause whether or not covered by the insurance required to be maintained by Landlord pursuant to Paragraph 8.2 (including any total destruction required by an authorized public authority) this Lease shall automatically terminate as of the date of such total destruction.

12.4 Damage Near End of Term: If the Premises are partially destroyed or damaged during the last six (6) months of the term of this, Landlord may at Landlord's option cancel and terminate this Lease as of the date of occurrence of such damage by giving written notice to Tenant of Landlord's election to do so within thirty (30) days after the date of occurrence of such damage.

12.5 Abatement of Rent; Tenant's Remedies: The provisions of A.R.S. 33-343 which relate to the termination of a lease when the Leased Premises is destroyed, shall apply and rent shall abate for any time during closure.

12.6 Termination-Advance Payments: Upon termination of this Lease pursuant to this Paragraph 12, an equitable adjustment shall be made concerning advance rent and any advance payments made by Tenant to Landlord. Landlord shall, in addition, return to Tenant so much of Tenant's security deposit as has not theretofore been applied by Landlord.

13. UTILITIES AND JANITORIAL SERVICE: Tenant shall pay for all water, gas, sewer, heat, light, power, telephone and other utilities and services supplied to the Premises, together with any taxes thereon. If any such services are not separately metered to Tenant, Tenant shall pay a reasonable proportion to be determined by Landlord of all charges jointly metered with other Premises. Additionally, Tenant shall pay for all janitorial services performed in the Premises.

14. ASSIGNMENT AND SUBLETTING:

14.1 Landlord's Consent Required. Tenant shall not voluntarily or by operation of law, assign, transfer, mortgage, sublet, or otherwise transfer or encumber all or any part of Tenant's interest in this Lease or in the Premises, without Landlord's prior written consent, which Landlord may condition at Landlord's discretion. Any attempted assignment, transfer, mortgage, encumbrance, or subletting without such consent shall be void, and shall constitute a breach of this Lease.

14.2 No Release of Tenant. Regardless of Landlord's consent, no subletting or assignment shall release Tenant of Tenant's obligations or alter the primary liability of Tenant to pay the rent and to perform all other obligations to be performed by Tenant hereunder. The acceptance of rent by Landlord from any other person shall not be deemed to be a waiver by Landlord of any provision hereof. Consent to one assignment or subletting shall not be

deemed consent to any subsequent assignment or subletting.

15. DEFAULTS; REMEDIES:

15.1 Defaults: The occurrence of any one or more of the following events shall constitute a material default and breach of this Lease by Tenant:

- (a) The vacating or abandonment of the Premises by Tenant.
- (b) The failure by Tenant to make any payment of rent or any other payment required of Tenant hereunder, as and when due.
- (c) The failure by Tenant to observe or perform any of the covenants, conditions, or provisions of this Lease to be observed or performed by Tenant, other than described in Paragraph (b) above, where such failure shall continue for a period of thirty (30) days after written notice hereof from Landlord to Tenant; provided, however, that if the nature of Tenant's default is such that thirty (30) days are reasonably required for its cure, then Tenant shall not be deemed to be in default if Tenant commenced such cure within said 30-day period and thereafter diligently prosecutes such cure to completion.
- (d) (i) The making by Tenant of any general assignment, or general arrangement for the benefit of creditors; (ii) the filing by or against Tenant of a petition to have Tenant adjudged a bankrupt or a petition for reorganization or arrangement under any law relating to bankruptcy (unless, in the case of a petition filed against Tenant, the same is dismissed within sixty (60) days; (iii) the appointment of a trustee or receiver to take possession of substantially all of Tenant's assets located at the Premises or of Tenant's interest in this Lease, where possession is not restored to Tenant within thirty (30) days; or (iv) the attachment, execution, or other judicial seizure of substantially all of Tenant's assets located at the Premises or of Tenant's interest in this Lease, where such seizure is not discharged within thirty (30) days.

15.2 Remedies: In the event of any such material default or breach by Tenant, Landlord may at any time thereafter, with or without notice or demand and without limiting Landlord in the exercise of any right or remedy which Landlord may have by reason of such default or breach:

- (a) Re-enter upon the Premises as provided by North Carolina law and take possession of the same and all trade fixtures, furnishings and equipment of Tenant including the right to change door locks and suspend utilities and services and expel or remove Tenant and all other parties occupying the Premises, using such force as may reasonably be necessary to do so without being liable to Tenant for any loss or damage occasioned thereby, unless such actions taken by Landlord are not allowed by, or pursuant to the legal rights granted Landlord under North Carolina law. Such personal property may be removed by Landlord from the Premises and stored for the account of and at the expense and risk of Tenant; or Landlord may, at its option, and in accordance with North Carolina law, sell said personal property, applying the proceeds of such sale against the balance owing by Tenant to Landlord under this Lease, including the expense of such removal and sale.
- (b) Terminate this lease or from time to time, without terminating this Lease, relet the Premises or any part thereof on such terms and conditions as Landlord, in its sole discretion, shall determine with the right to make alterations and repairs to said Premises; provided, however, that Landlord shall in no way be responsible or liable for any failure to relet the Premise or any part thereof or for any failure to collect any rent due upon any such reletting. In the event Landlord relets the Premises from time to time, the rentals so received shall be applied first to the payment of any obligation other than rent due hereunder from Tenant to Landlord, then to the payment of the cost of such reletting, including attorneys' fees and broker's commission which Landlord may have paid or incurred in connection with such repossession and reletting, then to the payment of the costs of any alteration or repair to the Premises to make them Tenantable or acceptable to a new Tenant, then to the payment of rent due and unpaid hereunder and the residue, if any, shall be held by the Landlord and applied in payment of future rent as the same may become due and payable hereunder. Whether or not the Premises are relet, Tenant shall pay Landlord all amounts required to be paid by Tenant up to the date of Landlord's re-entry and thereafter Tenant shall pay Landlord until the end of the term the amount of all

rentals and other charges required to be paid by Tenant hereunder, less the proceeds of such reletting during the term hereof, if any, after payment of the foregoing expenses.

(c) Pursue any other remedy now or hereafter available to Landlord under the laws and decisions of the State of North Carolina. Landlord shall not by such re-entry or any other act be deemed to have terminated this Lease or the liability of Tenant for the total rent reserved hereunder unless Landlord shall give to Tenant written notice of Landlord's election to terminate this Lease. In the event that Landlord shall terminate this Lease as provided herein, Landlord shall thereupon be entitled to recover from Tenant the worth, at the time of such termination, or the excess, if any, of the rent and other charges required to be paid by Tenant hereunder for the balance of the term (if this Lease had not been so terminated) over the then reasonable rental value of the Premises for such period.

16. **LATE CHARGES:** Tenant hereby acknowledges that late payment by Tenant to Landlord of rent and other sums due hereunder will cause Landlord to incur costs not contemplated by this Lease, the exact amount of which will be extremely difficult to ascertain. Such costs include, but not limited to, processing and accounting charges and late charges which may be imposed on Landlord by the terms of any mortgage or trust deed covering the Premises. Accordingly, if any installment of rent or any other sum due from Tenant shall not be received by Landlord or Landlord's designee within ten (10) days after such amount shall be due. Tenant shall pay to Landlord a late charge equal to ten (10%) of such overdue amount. The parties hereby agree that such late charge represents a fair and reasonable estimate of the costs Landlord will incur by reason of late payment by Tenant. Acceptance of such late charge by Landlord shall in no event constitute a waiver of Tenant's default with respect to such overdue amount nor prevent Landlord from exercising any of the other rights and remedies granted hereunder.

17. **CONDEMNATION:** If the Premises or any portion thereof are taken under the power of eminent domain, or sold under the threat of the exercise of said power (all of which are herein called "condemnation,") this Lease shall terminate as to the part so taken as of the date the condemning authority gives notice to terminate, whichever first occurs. If more than 35% of the floor area of the improvements on the Premises or more than 35% of the land area of the Premises which is not occupied by any improvements, is taken by condemnation, Tenant may, at Tenant's option, to be exercised in writing only within ten (10) days after Landlord shall have given Tenant written notice of such taking (or in the absence of such notice, within ten (10) days after the condemning authority shall have taken possession) terminate this Lease as of the date the condemning authority gives notice of termination. If Tenant does not terminate this Lease in accordance with the foregoing, this Lease shall remain in full force and effect as to the portion of the Premises remaining, except that the rent shall be reduced in the proportion that the floor area taken bears to the total floor area of the building situated on the Premises. Any award for the taking of all or any part of the Premises under the power of eminent domain or any payment made under threat of the exercise of such power shall be the property of Landlord, whether such award shall be made as compensation for diminution in value of the leasehold or for the taking of the fee, or as severance damages; provided, however, that Tenant shall be entitled to any award for loss of or damage to Tenant's trade fixtures and removable personal property. In the event that this Lease is not terminated by reason of such condemnation, Landlord shall, to the extent of severance damages received by Landlord in connection with such condemnation, repair any damage to Premises caused by such condemnation except to the extent that Tenant has been reimbursed therefore by the condemning authority. Tenant shall pay any amount in excess of such severance damages required to complete such repair.

18. **SURRENDER:** Tenant shall on the last day of the term hereof, or upon any earlier termination of this Lease, surrender and deliver the Premises to Landlord without delay and in good order, condition and repair, broom-clean, ordinary wear and tear excepted. All furniture, furnishings, fixtures and equipment, installed or used in the operation of the Premises, shall, throughout the term of this Lease, be the property of Tenant. At the expiration or earlier termination of this Lease, provided Tenant is not in default hereunder, Tenant may remove its unattached, movable equipment and trade fixtures. Upon the expiration or termination of this Lease, if so requested by Landlord, Tenant shall within ten (10) days following such expiration or termination, remove all such fixtures and equipment installed on the Premises by Tenant, whether or not such fixtures and equipment are attached to the building or other improvements located on the Premises, unless such removal would cause damage to the Premises which would require substantial repair. Tenant shall fully repair all damage of any kind or character to the Premises occasioned by the removal of any fixtures or equipment which repair shall include the patching and filling of holes and repair of structural damage. Any fixtures, furnishings, equipment or other personal property of Tenant which shall remain on the Premises

or any part thereof for ten (10) days following the expiration or termination of this Lease, at the option of Landlord, shall be deemed to have been abandoned by Tenant and either may be retained by Landlord as its property or disposed of, without accountability, in such manner as Landlord may determine.

19. GENERAL PROVISIONS:

19.1 Estoppel Certificate:

(a) Tenant shall at any time upon not less than ten (10) days prior written notice from Landlord execute, acknowledge, and deliver to Landlord a statement in writing (i) certifying that this Lease is unmodified and in full force and effect (or, if modified, stating the nature of such modification and certifying that this Lease, as so modified, is in full force and effect) and the date to which the rent and other charges are paid in advance, if any, and (ii) acknowledge that there are not, to Tenant's knowledge, any uncured defaults on the part of Landlord hereunder, or specifying such defaults if any are claimed. Any such statement may be conclusively relied upon by any prospective purchaser or encumbrance of the Premises.

(b) Tenant's failure to deliver such statement within such time shall be conclusive upon Tenant (i) that this Lease is in full force and effect, without modification except as may be represented by Landlord, (ii) that there are no uncured defaults in Landlord's performance, and (iii) that not more than one month's rent has been paid in advance.

(c) If Landlord desires to finance or refinance the Premises, or any part thereof, Tenant hereby agrees to deliver to any lender designated by Landlord such financial statements of Tenant as may be reasonably required by such lender. Such statements shall include the past three years' financial statements of Tenant. All such financial statements shall be received by Landlord in confidence and shall be used only for the purposes herein set forth.

19.2 Landlord's Liability: The term "Landlord" as used herein shall mean only the owner or owners at the time in question of the fee title or a tenant's interest in a ground Lease of the Premises, in the event of any transfer of such title or interest, Landlord herein named (and in case of any subsequent transfers the then grantor) shall be relieved from and after the date of such transfer of all liability as respects to Landlord's obligations thereafter to be performed, provided that any funds in the hands of Landlord or the then grantor at the time of such transfer, in which Tenant has an interest, shall be delivered to the grantee. The obligations contained in this Lease to be performed by Landlord shall, subject to aforesaid, be binding on Landlord's successors and assigns, only during their respective periods of ownership.

19.3 Severability: The invalidity of any provision of this Lease as determined by a court of competent jurisdiction, shall in no way affect the validity of any other provision hereof.

19.4 Interest on Past Due Obligations: Except as expressly herein provided, any amount due to Landlord not paid when due shall bear interest at 10% per annum from the date due. Payment of such interest shall not excuse or cure any default by Tenant under this Lease.

19.5 Time of Essence: Time is of the essence.

19.6 Captions: Article and paragraph caption are not a part hereof.

19.7 Incorporation of Prior Agreements; Amendments: This Lease contains all agreements of the parties with respect to any matter mentioned herein. No prior agreement or understanding pertaining to any such matter shall be effective. This Lease may be modified in writing only, signed by the parties in interest at the time of the modification.

19.8 Notices: Notices: Any notice required or permitted to be given hereunder shall be in writing and may be given by personal delivery or by certified mail, and if given personally or by mail, shall be deemed sufficiently given if addressed to Tenant or to Landlord at the address noted in the Fundamental Lease Provisions. Either party may, by notice to the other, specify a different address for notice purposes except that upon Tenant's taking possession

of the Premises, the Premises shall constitute Tenant's address for notice purposes. A copy of all notices required or permitted to be given to Landlord hereunder shall be concurrently transmitted to such party or parties at such addresses as Landlord may, from time to time, hereafter designate by notice to Tenant.

19.9 Waivers: No waiver by Landlord of any provision hereof shall be deemed a waiver of any other provision hereof or of any subsequent breach by Tenant of the same or any other provision. Landlord's consent to or approval of any act shall not be deemed to render unnecessary the obtaining of Landlord's consent to or approval of any subsequent act by Tenant. The acceptance of rent hereunder by Landlord shall not be a waiver of any preceding breach by Tenant of any provision hereof, other than the failure of Tenant to pay the particular rent so accepted, regardless of Landlord's knowledge of such preceding breach at the time of acceptance of such rent.

19.10 Recording: Tenant shall not record this Lease without Landlord's prior written consent, and such recordation shall, at the option of Landlord, constitute a non-curable default of Tenant hereunder. Either party shall upon request of the other, execute, acknowledge, and deliver to the other a "short form" memorandum of this Lease for recording purposes.

19.11 Holding Over: If Tenant remains in possession of the Premises or any part thereof after the expiration of the term hereof without the express written consent of Landlord, such occupancy shall be a tenancy from month to month at a rental in the amount of one and a half times the last monthly base rental plus all other charges payable hereunder, and upon all the terms hereof applicable to a month-to-month tenancy.

19.12 Cumulative Remedies: No remedy or election hereunder shall be deemed exclusive but shall, wherever possible, be cumulative with all other remedies at law or in equity.

19.13 Covenants and Conditions: Each provision of this Lease performable by Tenant and Landlord shall be deemed both a covenant and a condition.

19.14 Binding Effect: Choice of Law. Subject to any provisions hereof restricting assignment or subletting by Tenant set forth in Paragraph 14 and subject to the provisions of Paragraph 20.2, this Lease shall bind the parties, their personal representatives, successors, and assigns. This Lease shall be governed by the laws of the State of North Carolina.

19.15 Subordination:

(a) This Lease, at Landlord's option shall be subordinate to any ground lease, mortgage, deed of trust, or any other hypothecation for security now or hereafter placed upon the property of which the Premises are a part and to any and all advances made on the security thereof and to all renewals, modifications, consolidations, replacements, and extensions thereof. If any mortgagee, trustee, or ground Landlord shall elect to have this Lease prior to the lien of its mortgage, deed of trust, or ground lease, and shall give written notice thereof to Tenant, this Lease shall be deemed prior to such mortgage, deed of trust, or ground lease, whether this Lease is dated prior or subsequent to the date of said mortgage, deed of trust, or ground lease or the date of recording thereof.

(b) Tenant agrees to execute any documents required to effectuate such subordination or to make this Lease prior to the lien of any mortgage, deed of trust, or ground lease, as the case may be, and failing to do so within ten (10) days after written demand, does hereby make, constitute, and irrevocably appoint Landlord as Tenant's attorney in fact and in Tenant's name, place and stead, to do so.

19.16 Attorneys Fees: If either party brings an action to enforce the terms hereof or declare rights hereunder, the prevailing party in any such action, on trial or appeal, shall be entitled to his reasonable attorney's fees to be paid by the losing party as fixed by the court.

19.17 Landlord's Access: Landlord and Landlord's agents shall have the right to enter the Premises at reasonable times between 8 a.m. and 5 p.m. weekdays for the purpose of inspecting the same, showing the same to prospective purchasers or lenders, and making such alterations, repairs, improvements, or additions to the Premises or

to the building of which they are a part as Landlord may deem necessary or desirable. Landlord may at any time place on or about the Premises any ordinary For Sale and For Lease signs.

19.18 Merger: The voluntary or other surrender of this Lease by Tenant or a mutual cancellation thereof, shall not work a merger, and shall at the option of Landlord, terminate all or any existing subtenancies or may, at the option of Landlord, operate as an assignment to Landlord of any or all such subtenancies.

19.19 Corporate Authority: If Tenant is a corporation, each individual executing this Lease on behalf of said corporation represents and warrants that he is duly authorized to execute and deliver this Lease on behalf of said corporation, in accordance with a duly adopted resolution of the Board of Directors of said corporation or in accordance with the Bylaws of said corporation, and that this Lease is binding upon said corporation in accordance with its terms. If Tenant is a corporation Tenant shall within thirty (30) days after execution of this Lease, deliver to Landlord a certified copy of a resolution of the Board of Directors of said corporation authorizing or ratifying the execution of this Lease.

20. INTENTIONALLY OMMITTED

21. SAFETY: Tenant will maintain on Leased Premises at all times during the terms hereof adequate number, size and type of fire extinguisher as is appropriate to Tenant's business. Tenant will at all times adhere to good safety practices or as may be required by safety inspectors. No goods, merchandise or materials shall be kept, stored or sold by Tenant on or about the Premises which are in any way hazardous, and Tenant shall not suffer or permit any acts of omission or commission to be done on or about the Premises which will increase the existing rate of fire insurance. If the said insurance rate is increased by such an act, then the increased cost of such insurance on the building of which the Premises are a part shall be paid by Tenant to Landlord with the next succeeding installment of rental. Tenant, at its sole expense, shall comply with any and all requirements of any insurance organization or company necessary for the maintenance of reasonable fire and public liability insurance covering the Premises or the building of which the Premises are a part.

22. ENVIRONMENTAL MATTERS: Tenant will comply with all applicable federal, state and local laws, ordinances and regulations including, without limitation, all such laws, ordinances, or regulations relating to industrial hygiene, pollution or protection of the environment (collectively "environmental laws"). Tenant will be solely responsible for, and hereby indemnifies and the other party, its successors and assigns from and against any liability, loss, damage, cost or expenses, (including without limitation (i) the cost of any required or necessary repairs, removal action, remedial action, response costs, cleanup or detoxification of any real property collectively "Costs", (ii) damage to any natural resources "Damage", and (iii) attorneys' fees and expenses, consultants' fees and expenses and expenses of litigation "Fees") directly or indirectly arising out of or attributable to Tenant's use, generation, storage, release, threatened release, discharge, disposal or presence of any hazardous or toxic substances, waste or materials in or about the property, caused by the acts or omissions of Tenant. It is understood that no hazardous materials, will be kept within the leased premises.

In addition, Tenant shall hold harmless Landlord, its successors and assigns, from and against any liability, loss, damage, cost or expenses (without limitation Costs, Damage and Fees) directly or indirectly arising out of or attributable to Tenant's use, generation, storage, release, threatened release, discharge, disposal or present of any hazardous or toxic substances, waste or materials in or about the property caused by the acts or omissions of Tenant and/or its employees, agents, customers, and invitees.

Landlord warrants that as of the time of Possession, as defined herein, the Premises are clean and clear of any environmental use generation, storage, release, threatened release, discharge, disposal or presence of any hazardous or toxic substance, substances, waste or materials in or about the Premises, and there have in the past been no occurrences of environmental spills, wastes or discharges which have resulted in any legal need or necessity or requirement to clean up and/or clear.

23. AMERICANS WITH DISABILITIES ACT (ADA): As utilized by Tenant, the leased premises may, or may not be subject to the requirements of the Americans with Disabilities Act (ADA) which in certain situations requires the

removal of physical barriers to employees and/or, members of the general public who are disabled. It is understood and agreed that the tenant shall bear full responsibility for ADA compliance within the entire leased premises including, but not limited to, all entrances to the leased premises. Landlord shall be responsible for ADA compliance as the act may pertain to common areas of the development. Landlord and Tenant agree to indemnify and hold each other harmless for any and all claims arising because of the failure of either to carry out its responsibility under this provision.

24. AGENCY DISCLOSURE: Landlord and Tenant acknowledges that neither party has had dealings with any agent or broker in connection with the Premises or the lease negotiation. Tenant acknowledges that Rick Howard, as a member of Landlord, is a licensed real estate broker in the State of North Carolina (d.b.a. Langtree Group LLC) and is acting as principal for his own benefit.

25. OPTION TO PURCHASE: Following the expiration of the third year of the lease term, and for a period of two years, Providing Tenant is in full compliance of the Lease, Tenant shall have the option to purchase the real property described herein for a PURCHASE PRICE OF \$4,750,000 plus an amount equal to any TIFFE Allowance advanced, as provided for herein, less the unamortized portion of those funds allocated specifically to painting, carpeting, cove base, and texturing. To determine the unamortized portion, said costs shall be amortized over the term of the lease at a rate of 5% per annum, the amount of which shall be deducted from the reimbursable portion of the TIFFE Allowance. The Option to Purchase shall be subject to the following terms and conditions:

25.1 Expiration of Option: This option may be exercised at any time after June 30, 2019, and shall expire at midnight July 1, 2021. Upon expiration Landlord shall be released from all obligations hereunder and all of Tenants' rights hereunder, legal or equitable, shall cease.

25.2 Exercise of Option: The option shall be exercised by mailing or delivering written notice to Landlord prior to the expiration of this option and by an additional payment, on account of the purchase price, in the amount of \$10,000.00 for account of Landlord to the authorized title company referred to herein, prior to the expiration of the option. Notice, if mailed, shall be by certified mail, postage prepaid, to Landlord at the address set forth herein, and shall be deemed to have been given upon the day shown on the postmark of the envelope in which such notice is mailed. In the event the option is exercised, the \$10,000.00 consideration paid for the option shall be credited upon the purchase price.

25.3 Offer and Time for Acceptance: Upon Landlord's receipt of Tenant's expression to exercise said Option, Landlord shall deliver a Purchase Agreement to Tenant within ten (10) business days, for Tenant's review and approval. Landlord and Tenant agree to cooperate in the preparation of a mutually acceptable agreement and complete same in a timely and efficient manner. Upon mutual execution of said agreement, escrow shall be opened within five (5) business days with Designated Title Company, Mooresville, North Carolina.

25.4 Disclaimer: The parties acknowledge that speculation of availability of financing, purchase costs, and lender's prepayment penalties is impossible. Therefore, the parties agree that these items shall not be conditions of performance of this agreement and the parties agree they have not relied upon any other representations or warranties by brokers, sellers, or other parties.

25.5 Fixtures: All improvements, fixtures, attached floor coverings, window covering, and items permanently attached to the real property shall be included, free of liens, unless specifically excluded.

25.6 Personal Property: All personal property, on the premises when inspected by Tenant, shall be included in the purchase price and shall be transferred by a Bill of Sale with Warranties at close of escrow.

25.7 Seller Disclosure: No later than 15 days after exercise of this option to purchase, Landlord shall provide to Tenant the following documents which are collectively referred to as the "Seller Disclosures"

1. a Seller property condition disclosure, signed and dated by the Landlord;
2. a commitment for the policy of title insurance;

3. written notice of any claims and/or conditions known to the Landlord relating to environmental problems and building or zoning code violations.

25.8 Examination Of Title: The Tenant has fifteen (15) days from date of receipt of the seller disclosure to examine the title of the property and to report in writing any valid objections thereto. Any exceptions to the title which would be disclosed by examination of the records shall be deemed to have been accepted unless reported within said fifteen (15) days. If Tenant objects to any exceptions to the title, Landlord shall use all due diligence to remove such exceptions at his own expense within sixty (60) days thereafter. But if such exceptions cannot be removed within the sixty (60) days allowed, all rights and obligations hereunder may at the election of Tenant, terminate and end, unless Tenant elects to purchase the property subject to such exceptions.

25.9 Closing Costs: Escrow fees, if any, and other closing costs shall be paid as follows:

- Landlord agrees to pay for a standard coverage Landlord's policy of title insurance insuring Tenant in the amount of the Purchase Price.
- Landlord and Tenant shall each pay one half (1/2) of the fee charged by the escrow/closing office for its services in the settlement/closing process. Taxes and assessments for the current year shall be prorated as of Settlement date.

25.10 Close Of Escrow: Within 90 days from exercise of the option, or upon removal of any exceptions to the title by Landlord, as provided above, whichever is later, both parties shall deposit with an authorized escrow holder, to be selected by Landlord, all funds and instruments necessary to complete the sale in accordance with the terms and conditions hereof. The representations and warranties herein shall not be terminated by conveyance of the property.

25.11 Prorations: Rents, taxes, premiums on insurance, and other expenses of the property shall be prorated as of recordation of deed. Security deposits, advance rentals or considerations involving future lease shall be credited to Tenant.

26. This lease shall be contingent upon Classical Education Schools of North Carolina, receives final approval from the North Carolina Department of Education to open the school for the school year 2024/2025.

IN WITNESS WHEREOF, Landlord and Tenant have duly executed and delivered this Lease as of the day and year first above written.

LANDLORD

TENANT

Langtree Group, L.L.C.

Classical Education Schools of North Carolina

Rick Howard, Managing Member Date

Walter Tribolet, Secretary to Board Date

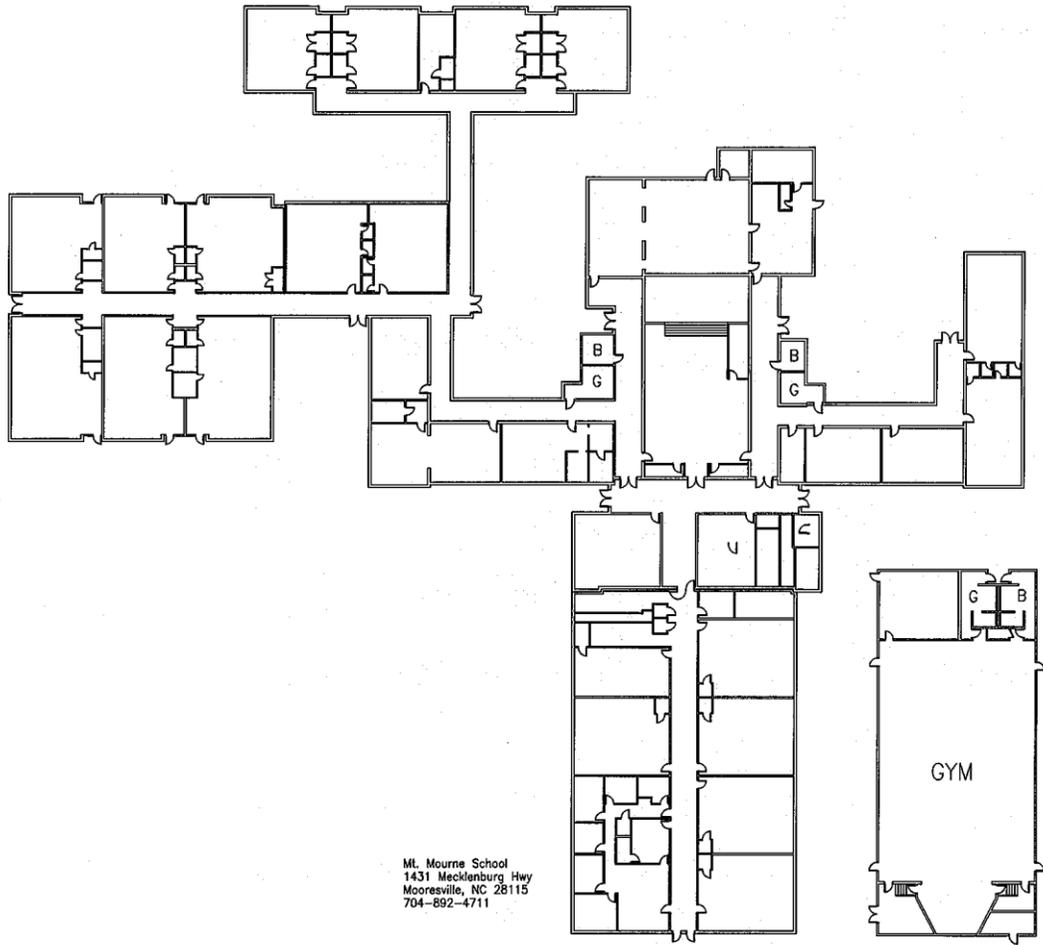
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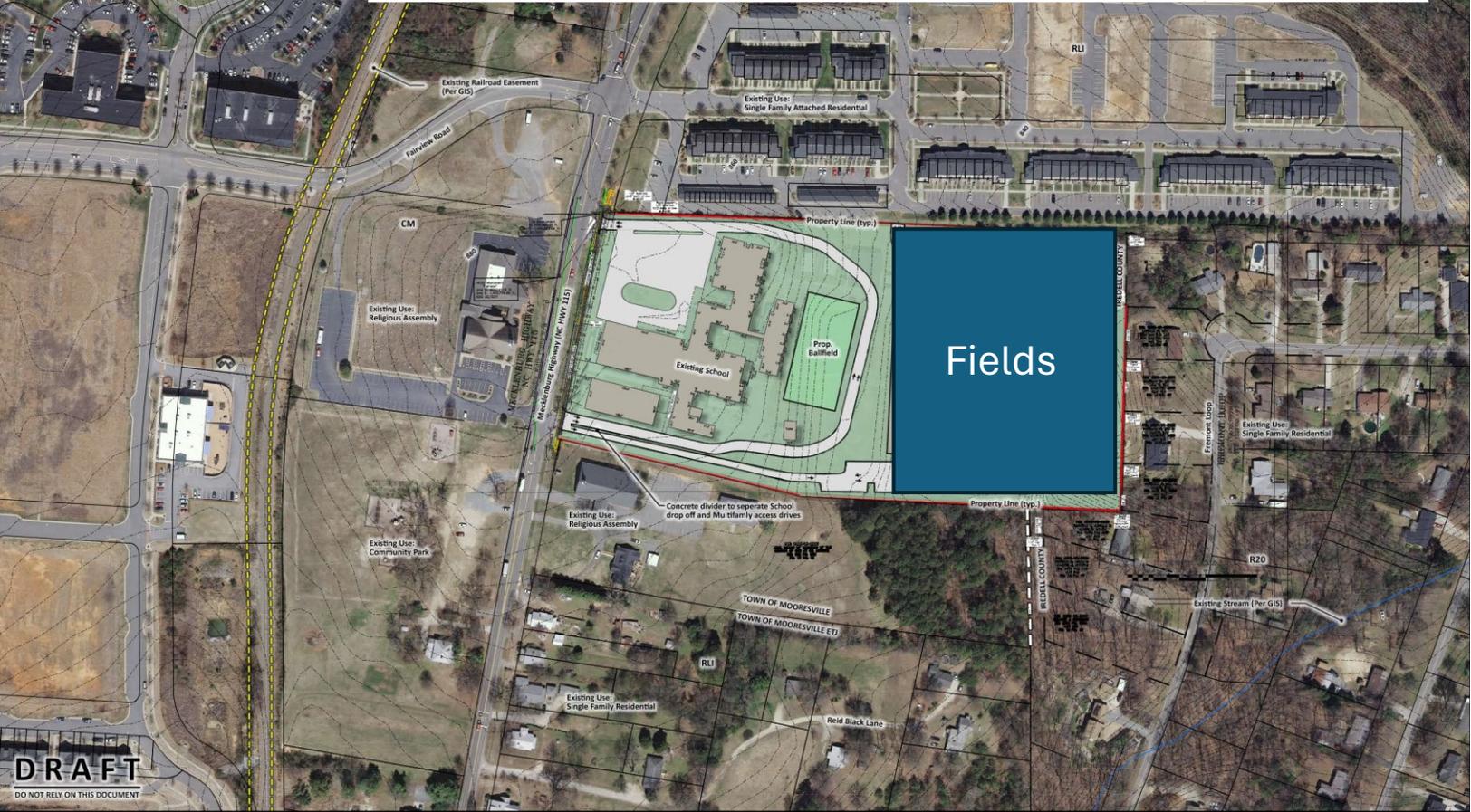
**Mt
Mourne
School**


TRINITAS ACADEMY
Classical Education - North Carolina





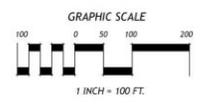
Mt. Mourne School
 1431 Mecklenburg Hwy
 Mooresville, NC 28115
 704-892-4711



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 DO NOT RELY ON THIS DOCUMENT



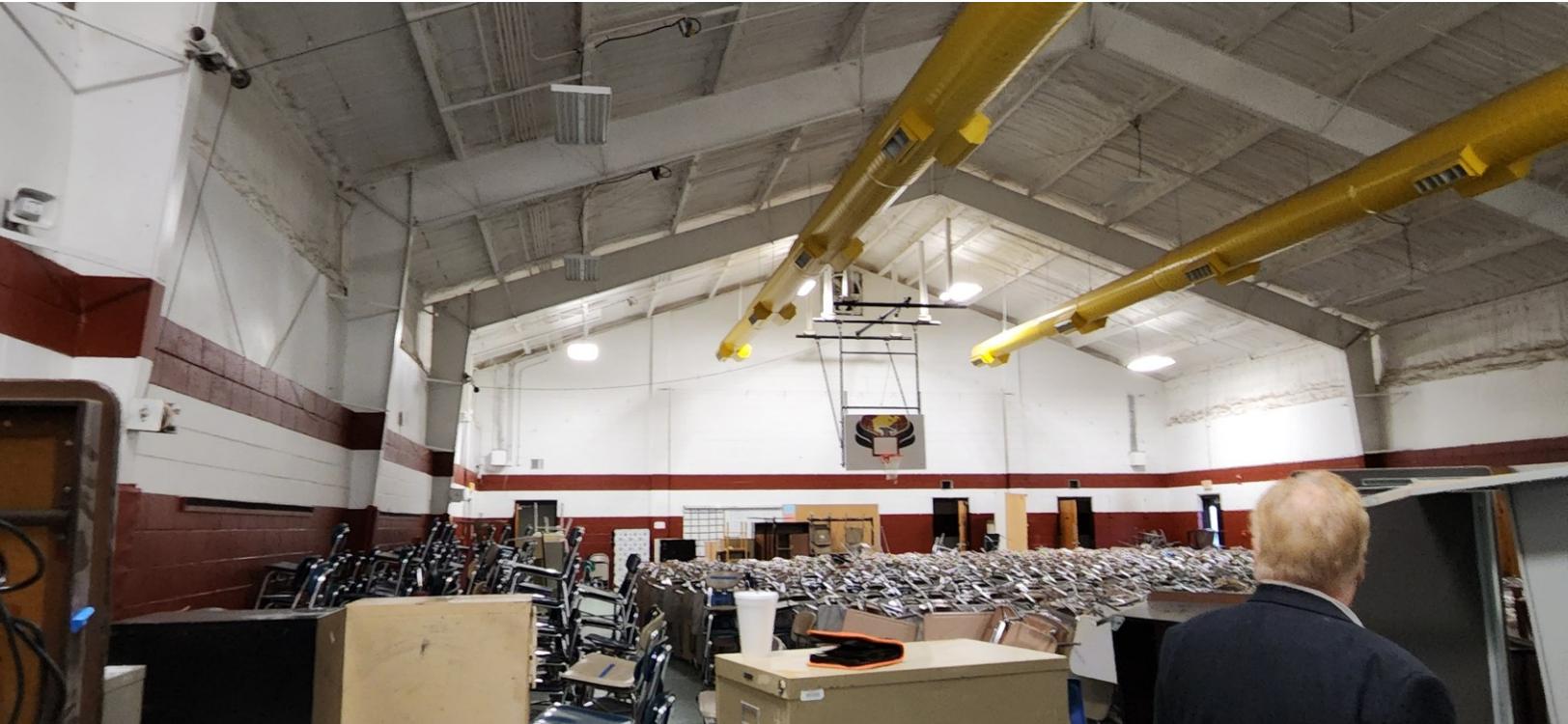
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GYM



TRINITAS ACADEMY
Classical Education - North Carolina





Functioning Classrooms



TRINITAS ACADEMY
Classical Education - North Carolina







TRINITAS ACADEMY
Classical Education - North Carolina



Q232. Attach as Appendix N: Proposed Budget for Year 1 through Year 5

Line Item Assumptions

Accounting/Audit. We have allocated \$20,000 for our annual audit, which is typical for a founding charter school our size.

Legal. Year one, we budgeted \$5500 for legal fees. The line item increases based on potential EC, HR, or liability fees that may occur. Based on general budgeting practices, it is a reasonable estimate that may be in the range of \$20,000 to \$50,000 per year for a charter school of this size. The actual amount should be determined based on the school's specific circumstances and legal requirements. The school should carefully monitor and manage these expenses as part of its fiscal responsibilities. Based on general budgeting practices, a reasonable estimate of legal fees will range from \$15,000 to \$50,000 per year for a charter school of this size.

Payroll Services. We have allocated \$22,750 (to \$49,268 in y5) to cover the expense of contracting with a Professional Employer Organization (PEO), which will handle the school's HR responsibilities. Many founding charter schools outsource payroll to a vendor; our preference is to work with PEOs, as they are cost-effective and have expertise that will benefit the employees and school.

Special Education Services (EC). We have set aside \$24,000 Y1 (to \$40,000 Y5) for outside EC vendors. Related services include OT, PT, etc. We set aside \$18,500 Y1 (to \$35,512 Y5) for EC supplies, etc. In the payroll section, we have one EC Lead Teacher and two/more EC support, aid/tech, or other support teachers. We have one English as a second language teacher. We feel this may be too many for the year one enrolled population, but we choose to be on the high side.

Board Expenses. We also include \$ 5,000 in Year One to cover basic board expenses like annual training, materials, or board needs.

Classroom Teaching Supplies/Materials. We have allocated \$30,000 for classroom materials, which includes some workbook materials (others are allocated for Textbooks/Workbooks), paper, pens/pencils, notebooks, etc.

Textbooks/Workbooks. This assumes the costs of textbooks and online curriculum for all core content classes and some intervention curricula. The cost of startup books is largely captured in the start-up budget. Y1 costs will be for replacements and preparation for Y2. The costs of textbooks/workbooks will always be incurred one year ahead of usage.

Custodian Supplies/Materials Other. We have allocated \$24,000 to capture restroom, kitchen, teacher workroom cleaning, and other general supplies. We are budgeting for two custodians years 1 and 2 and adding a third year 3 to 5.

Food Service. This budget does not include income or expenses for lunch services. We have interviewed and identified lunch vendors that will bill families directly for meals. We plan to

offer a free lunch to anyone who needs lunch. We do not plan to participate in the national school lunch program, but we will offer free options as necessary. This line item covers the expense of providing these free lunch options. This line item is larger than we expect. There are two lunch service aids in the employment budget in addition to the food service line item.

Telephone/Communications. We have allocated \$15,000 in telephone and internet service charges, which is aligned with what local area charter schools pay for communications each year.

Technology. We have \$18,500 in technology set aside in the Year One budget. The bulk of the startup costs for technology will be incurred in Y0, and the Y1 budget covers replacement for loss/damage and smaller tech items like document cameras, etc.

Student Testing & Assessment. We have set aside \$7,650 to cover the cost of student assessments – namely NWEA MAP.

Office Expense. Assumes the maintenance and yearly lease cost of copy machines.

Staff Development. We have set aside \$24,000 to cover expenses related to staff development. This number includes the cost of running our summer pre-service PD and the potential cost of bringing some outside vendors onto campus to provide expert PD in Charlotte Mason/Classical Education, literacy curriculum implementation, and math curriculum implementation.

Staff Recruitment. We have set aside \$8,500 for staff recruitment, which will include the costs of targeted ads on social media, fees for recruitment events, collateral, etc.

Student Recruitment/Marketing. Just like in Y0, we have allocated \$50,000 in Year One to student recruitment. We understand that one of new-start charter schools' biggest challenges is to open fully enrolled. This will cover paid advertisements in local publications, geo-targeted social media ads, part-time canvassing support, supplies, materials, and any fees related to enrollment events.

Travel. We have set aside \$2,000 monthly to cover staff travel to PD events, etc.

FACILITY OPERATION & MAINTENANCE

Insurance. We have set aside \$32,000 in insurance for our liability policy. The building insurance is included in our lease. , This coverage total was an actual quote from ECM Insurance, a specialty charter school insurer.

Janitorial Services. We have allocated \$76,000 per year for janitorial services. This includes 2 full-time custodians. Supplies are an additional \$24,000 per year for paper and cleaning chemicals.

Building Lease. Our lease expenses reflect that we have secured a 60,000 sf facility on 12 acres of land. The lease terms and sample lease have been negotiated. The lease includes funds for fixturization, customization, and capital to open the school. The building was a prior district

school that was closed in 2022. Upgrades that have been or will be done are listed in the building section. There is a Certificate of Occupancy in place.

Repairs & Maintenance. We have set aside \$20,000 in Repairs & Maintenance costs, which is \$0.33 psf of a 60,000 sf building. This will cover minor cosmetic upgrades like touch-up paint, drywall patches, waxing the floors, etc. It is not meant to cover larger-scale renovations.

Security Services. We have allocated \$10,000 to Security, which is earmarked for a digital security camera system. Our Raptor system is accounted for in the Startup year.

Utilities. We have set aside \$50,000 in electricity costs, which equates to a little less than a dollar per square foot of facility space, depending on how big the final facility design is (55k-60k sf). We estimate another \$20,000 per year for water, sewage, etc. We have historical records of the costs of utilities.

Contingency. We have set aside a reserve of \$398,940 generated after year one. This does not include a pledged \$100,000 from the Rene McGuire Foundation or any fundraising efforts conducted in the community or from our families.

Staffing

2024-2025

These ranges are based on the Iredell Statesville School District Salary Ranges
Trinitas Academy is projecting the following salary ranges:

Position	Range In District	Trinitas Budget
Principal	\$79,883 - \$95,860	\$103,000
School Operations Manager	\$31,200 - \$69,000	\$56,000
Assistant Principal	\$45,220 - \$66,790	\$69,000
Instructional Coach	\$45,000 - \$65,000	\$69,000
EC Teachers	\$50,000 - \$60,000	\$60,000
Clerical	\$35,000 - \$45,000	\$50,000
Teacher Assistant	\$20,000 - \$30,000	\$24,000
Classroom Teachers	\$37,000 - \$60,480	\$57,000
Specials Teachers	\$37,000 - \$60,480	\$57,000
Tutor	\$33,480 - \$45,100	NA
Custodian	\$31,200 - \$44,500	\$38,000

Healthcare:

The average monthly premium for a major medical individual health insurance plan in North Carolina is \$482 (\$5424 annually) for a Bronze plan. This means that an individual can expect to pay an average of \$482 per month for a major individual health insurance plan in North Carolina. We are budgeting that all our eligible staff accept the school-provided health insurance. In reality, a much smaller percentage of staff will take our insurance options as many will have coverage through a spouse.

<https://www.ehealthinsurance.com/north-carolina-health-insurance>

Retirement

We are projecting a 6.5% retirement match for each employee's 401k. We calculated the match at an average salary of \$57,000 per employee. We are budgeting for all the employees to participate and match up to the max of 6.5%.

Trinitas Classical Academy

Mt Mourne



TRINITAS ACADEMY

Classical Education - North Carolina

Trinitas Schools Enrollment Interest Form

2 messages

noreplytrinitasschools@gmail.com <noreplytrinitasschools@gmail.com>
To: info@catoacademytexas.org, joe@johigginsinc.com

Sat, Apr 13, 2024 at 5:40 AM



Enrollment Interest

Please fill out this form to receive alerts and correspondence relating to Trinitas Academy. Submitting this form does not, however, ensure your scholar's enrollment. We will contact interest list families as soon as the State of North Carolina approves our opening date.

Name (Required)

First Name [] Last Name []

Email (Required)

[]

Phone (Required)

[]

Address (Required)

[]



Address

[]

City

[]

State

[]

ZIP Code

[]

Student Information

Please fill out one form for each child. Thank You

CHILD INFO

Child's First Name (Required)

Child's Last Name (Required)

Age of Child

[] [] []

Parent/Guardian Signature (Required)

[]

Trinitas Schools Enrollment Interest Form

2 messages

noreplytrinitasschools@gmail.com <noreplytrinitasschools@gmail.com>
To: info@catoacademytexas.org, joe@johigginsinc.com

Name

Jennifer Nguyen

Email

jendinh@yahoo.com

Phone

2145293902

Address

334 Kennerly Center Dr
 Mooresville, North Carolina 28115
 United States
 Map It

Child's First Name

Ezra

Child's Last Name

Nguyen

Age of Child

4

Parent/Guardian Signature

Mail Delivery Subsystem <mailer-daemon@googlemail.com>
To: noreplytrinitasschools@gmail.com

Wed, Mar 13, 2024 at 7:24 PM

PARENT SIGN UP FORM

Name

Bryan Canales

Email

bryanucg@gmail.com

Phone

9176867761

Address

104 Honey ct
 Mooresville, North Carolina 28117
 United States
 Map It

Child's First Name

Zoe

Child's Last Name

Canales

Age of Child

7

Parent/Guardian Signature

Mail Delivery Subsystem <mailer-daemon@gmail.com>
To: noreplytrinitasschools@gmail.com

Name

Stephanie Giffin

Email

giffinstephanie@gmail.com

Phone

7047740458

Address

141 Castleview Lane
 Mooresville, North Carolina 28115
 United States
 Map It

Child's First Name

Madeline

Child's Last Name

Giffin

Age of Child

8

Parent/Guardian Signature

Mail Delivery Subsystem <mailer-daemon@googlemail.com>
To: noreplytrinitasschools@gmail.com

Mon, Feb 12, 2024 at 1:54 PM



TRINITAS ACADEMY

Classical Education - North Carolina

**I am part of the leadership team of a new school opening at Mt. Mourne.
Please help us get the word out and share this with other families.**

Here are some of the unique advantages of our school model:

Classical Education Model

At the heart of our school lies a time-honored approach to learning that has stood the test of centuries. Our classical education model is rooted in the Trivium, a three-stage process that cultivates the mind and fosters a deep understanding of the world around us. Through the stages of Grammar, Logic, and Rhetoric, your child will develop a strong foundation in core subjects, critical thinking skills, and the ability to articulate their thoughts with clarity and confidence.

Character Education

Alongside our rigorous academic curriculum, we place a strong emphasis on character education. We believe that true excellence is not just about academic achievement, but also about the cultivation of virtues such as integrity, perseverance, and compassion. Our character education program is woven into every aspect of our school, ensuring that your child not only excels in the classroom but also grows into a well-rounded, ethical individual.

Latin and History

At Trinitas, we recognize the immense value of studying Latin and history. Latin, the foundation of many modern languages, not only enhances your child's understanding of language and grammar but also provides a gateway to the Western world's rich cultural and intellectual heritage. Alongside Latin, our history curriculum delves deep into the past, allowing your child to profoundly appreciate the events and ideas that have shaped our world.

Athletics and Extracurriculars

We understand that a well-rounded education extends beyond the classroom. That's why we offer a robust athletics program and a wide range of extracurricular activities. From team sports to artistic pursuits, your child will have the opportunity to explore their interests, develop new skills, and foster a sense of community.

Join Our Growing Community

The Mt. Mourne school has a 75+ year history in the Mooresville area. Our group is looking to reopen the school and continue the long legacy of educating the future citizens of our community.

We are actively recruiting new families who share our passion for Classical Education and are committed to shaping the future of our school. By joining our community, you will not only provide your child with an exceptional educational experience but continue the legacy of a local institution in Mt. Mourne School.



TRINITAS ACADEMY
Classical Education - North Carolina

TUITION FREE CLASSICAL EDUCATION

Kinder to 8th Public Charter School

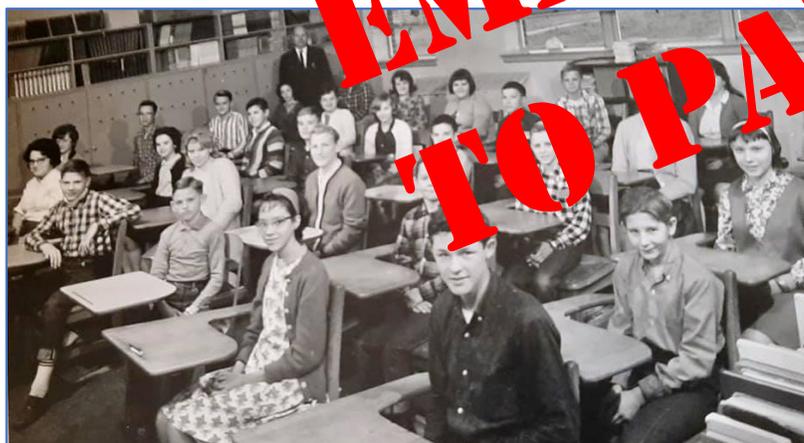
- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts - Socratic Learning - Athletics
- ⇒ Empowered Teachers

Virtue | Faith | Academics | Family | Connection

Permitted by the State of North Carolina

LEARN MORE AT: TrinitasSchools.org

**EMAIL FLYER
TO PARENTS**



JOIN OUR INTEREST LIST

Coming Soon
**Award Winning
Classical Education - K8
Latin & Logic**

SIGN UP  TrinitasSchools.org

 Proposed Location
Mt. Mourne School, Mooresville, NC

We will update you on live and virtual open houses and more.   



K8 Opening August of 2025

1431 Mecklenburg Hwy
Mooresville, NC.



TrinitasSchools.org

BUILDING BANNERS



TRINITAS ACADEMY
Classical Education - North Carolina

TrinitasSchools.org

JOIN OUR WAITING LIST

Tuition Free Charter School

Kinder to K8



Mt. Mourne School – A 75 Year Legacy



TUITION FREE
CLASSICAL EDUCATION

Kinder to 8th
Public Charter School

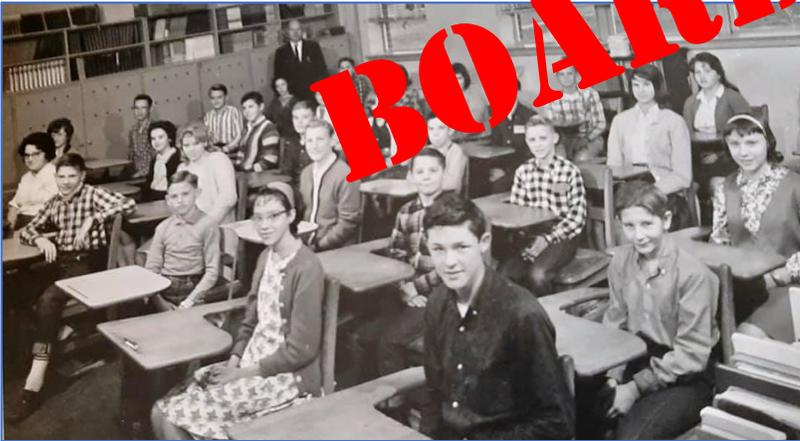
- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts – Socratic Learning – Athletics
- ⇒ Empowered Teachers

Virtue Safety Athletics Family Involvement

*Pending Approval from the State of North Carolina

LEARN MORE AT: TrinitasSchools.org

BOARD FILTER



JOIN OUR INTEREST LIST

Coming Soon
Award Winning
Classical Education – K8
Latin & Logic

SIGN UP  TrinitasSchools.org

 Proposed Location
Mt. Mourne School, Mooresville, NC

We will update you on live and virtual open houses and more.



K8 Opening August of 2025

1431 Mecklenburg Hwy
Mooresville, NC.



TrinitasSchools.org

What Is Classical Education

**ROTARY
PRESENTATION**

Mt Mourne 75 Year History



Mrs. Eunice J. Johnston
Teacher - Fourth Grade

MT. MOURNE ELEMENTARY SCHOOL
Mt. Mourne, North Carolina
1964-65

James P. Pines
Principal



Classical Education

- Charlotte Mason
- Character Education
- Home School Inclusion



Trinitas Academy

Classical Charter

Kinder To 8th
Grade

Mt Mourne School

12 acre campus
60,000 sq ft base
Playground –
full size gym – fields

Character Education Focus

**Full digital learning
available as a resource**

Homeschool Inclusion

After School

Virtue Based STEM
Tutoring - Explore Partnerships
(Boys and Girls, Girl Scouts etc.)

Every day from 3 to 6
Three class periods
Fun, Sports, Hands on
Value Virtue focus in alignment
with the school
Parent pay or sliding scale

Athletics

Starting in 5th Grade

Boys and Girls
Track
Volleyball
Basketball
Flag Football
Soccer

Opening 2025

K6 year 1
K8 year 3

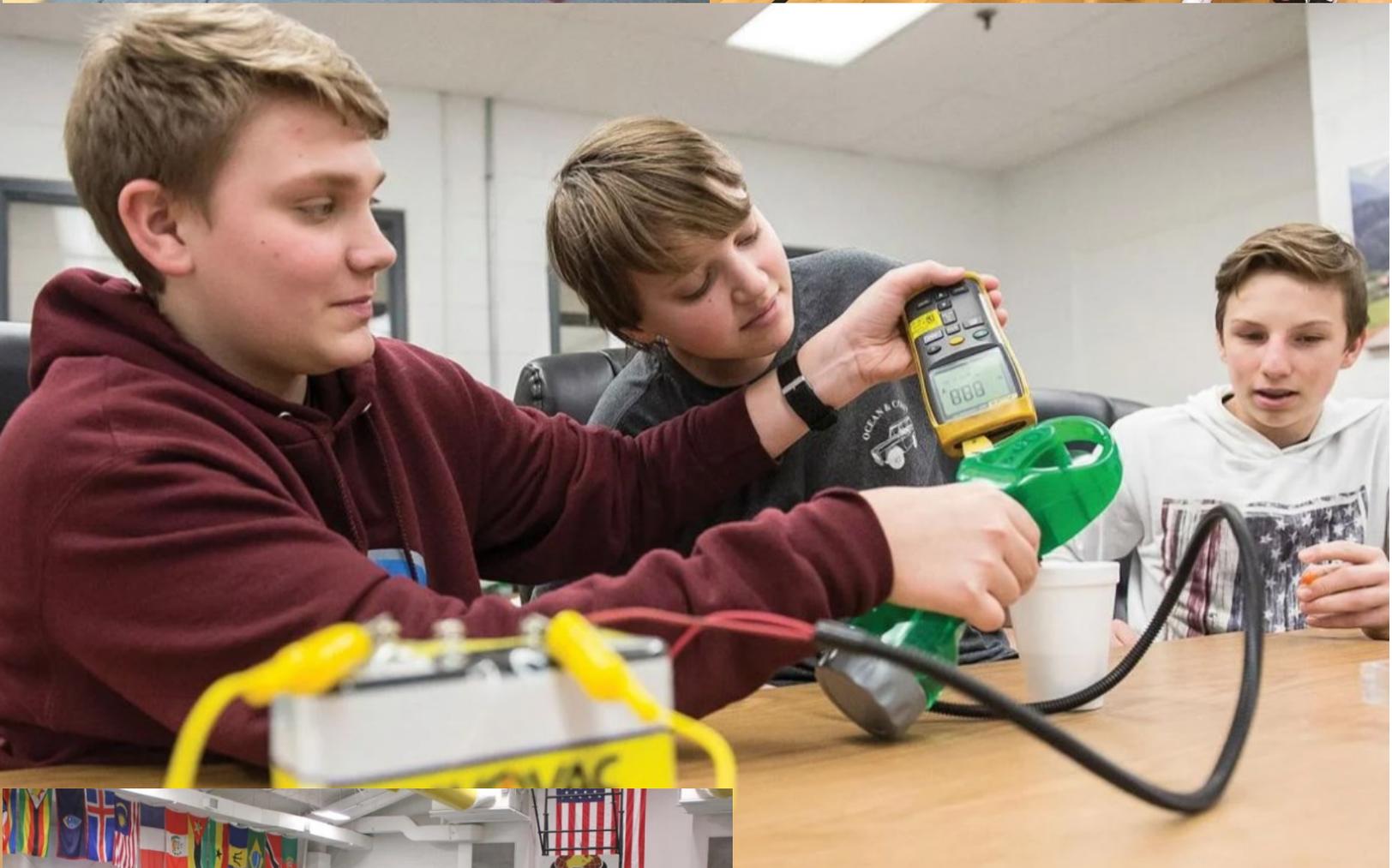
Dr. Boen Nutting

Principal

Governing Board

- Walter Tribolet
- Clark Mikail
- Susan Tillis
- Will Bowen
- Judge Marcus Long
- Mark Lockman
- Joe Higgins
- Anthony Famiglietti





School's Mission:

At Trinitas Classical Academy, our mission is to support a **diverse scholar population** a foundation in education to prepare them for the future. Our school focuses on **rigorous academics, character formation, and civic responsibility.**

Our school will **partner with parents** to provide the time-tested Charlotte Mason and Classical Education academic model. We believe in **empowering, equipping, and training our teachers** with tools and support to instill a lifelong love of learning in our scholars.

**ROTARY
PRESENTATION**



**TUITION FREE
CLASSICAL EDUCATION**

**Kinder to 8th
Public Charter School**

- ⇒ Character Building & Civic Responsibility
- ⇒ Rigorous and Diverse Curriculum
- ⇒ Arts – Socratic Learning – Athletics
- ⇒ Empowered Teachers

Virtue Safety Athletics Family Connection

*Pending Approval From The State of North Carolina

LEARN MORE AT: TrinitasSchools.org

School's Vision:

The vision of Trinitas Academy is to hold our leaders, teachers, and students to the highest level of integrity and accountability. We model what we teach. We embed character development in everything we do. We expect what we model. Our vision statement was formulated by reaching back into history and modeling the great thinkers and leaders on the character attributes that we look to teach and model in our schools:

Courage (Aristotle)

"Courage is the first of human qualities because it is the quality that guarantees the others."

Curiosity (Einstein)

"It is a miracle that curiosity survives formal education."
Curiosity, makes the acquisition of knowledge and wisdom long-lasting.

Humility (Aquinas)

"Where there is humility, there is wisdom"

Gratitude (Cicero)

"Gratitude is the parent of all other virtues – which allows us to seek what is Good, True and Beautiful."

Dignity (Martin Luther King Jr.)

Every man [human being] is an heir to a legacy of dignity and worth.

Justice (Gandhi)

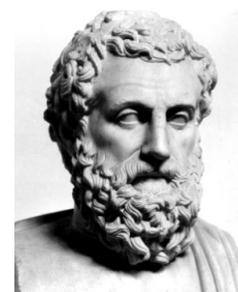
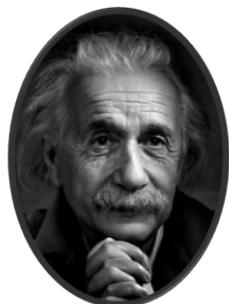
"Truth never damages a cause that is just."

Fortitude (Locke)

"Fortitude is the guard and support of other virtues."

Responsibility (Abraham Lincoln)

"You cannot escape the responsibility of tomorrow by evading it today." What matters is measured.



3

Trivium: Latin term for the meeting place of three roads. Grammar – Logic – Rhetoric

4

Time Periods : Ancient (1st, 5th, 9th), Medieval, (2nd, 6th, 10th) America's Founding (3rd, 7th, 11th) Modern (4th, 8th, 12th)

3

Time Periods : Repeated 3 Times

7

The 7 liberal arts comprise the trivium and quadrivium: a set of 3 core skills, taught first, followed by 4 more advanced subjects. Arithmetic, Geometry, Music (Arts), Astronomy

20

Values and Virtues: Focus on specific virtues that defined Western Thought. Pinnacle – **Truth Beauty Goodness**

What Is Classical Education?

Perfected Over 1100 Years,
Rooted In The Great Works of
Literature, Arts, History, Mathematics and Science,
Classical Education Is A Fit For Families All Over America.



1 Pillars of Classical Ed

Teach Values and Virtues

Through great works of literature, art, music, math and scientific advancements from a historical view.

Natural Education Transitions

The Trivium - Education progression along the child's developmental stages. From Grammar to Logic To Rhetoric.

Interwoven Subjects

Subjects based on a year long, in depth study of a time period in history

Deeper Dives Into Learning

Explore in depth, the Society, Politics, Religions, Intellectual Advancements, Technology, Economics of societies from Ancient to Modern. Socratic Instruction and Source Document Analysis. Much More Than Dates and Facts.

Rigorous Academics

Heavy emphasis on writing, oratory and literature interpretation skills.

Pursuit of the Good, True and Beautiful

2 Pillars of Ethos Logos Program

Partner closely with the Parents. Learning Starts at the Home.
SCHOOL is in ALIGNMENT with the HOME.

Teachers are the Authority in the Classroom.
Careful Hiring, Training and Support of Teachers is our Culture.

Encourage Excellence and not Perfection.

Discipline based on the works of Dr. Rudolf Druikurs, and Adlarian psychologist. Encouragement and relationships are the key to discipline and learning.

Focus on Character Education, Social/Emotional Learning is EQUAL to the Focus on Academics.

Learn from History, Embrace Our Past, Understand Today, Prepare for tomorrow.



What Is Classical Education?

3 Three Stages of Learning The Trivium



Grammar Stage K-3

Heavier on Direct Instruction
Instill WONDER.
Math Facts
Grammar Rules
Recitations of Poetry
Beginning Socratic



Logic Stage 4-6

Scholars Start Asking 'Why?'
Connecting Facts with Ideas
Deeper Dive Into Concepts
Awareness of Others
The Good, True and Beautiful
Heavier Socratic Base



Rhetoric Stage 7-12

Socratic Discussions
Strong Verbal and Writing
Critical Thinking
Linking Past to Today
Capstone Projects
Personal Beliefs Explored

Concentration of the Trivium: Tools of Learning along natural transitions

Grades K-5	Grades 5-8	Grades 8-12
Grammar Foundational Learning Beginning Latin Mathematics Concepts Memorize – Language Rules Oration via Recitation	Grammar	Grammar
Logic	Logic Asking 'Why' Stage Making sense of facts String together concepts Connecting across subjects Written & Oral Skills	Logic
Rhetoric	Rhetoric	Rhetoric Socratic Stage Reasoning – Persuasion Draw upon Grammar/Logic Internalization of Learning Advance Oral and Written

Shaded boxes are the dominant, but not exclusive, tools and techniques used for instruction. During each stage, all the subjects are taught (Math, Science, English, History, Fine Arts).



FACT: The Trivium Was Introduced In The Middle Ages
Stages Naturally Progress Along The Child's Development Levels.

What Is Classical Education?

4 History Time Lines Year Long - Thematic Units



Ancient Times 1st - 5th - 9th Grades

Formation of Civilizations
 Egypt - Mesopotamia
 Ancient China - Confucius
 Abraham - Moses
 Babylon - Phoenicians
 Greek Culture
 Aristotle - Plato - Socrates
 Rise and Fall of Rome
 Christianity Starts



Medieval Times 2nd - 6th - 10th Grades

After The Fall of Rome
 Magna Carta
 The Rise of The Church
 Knights and Samurais
 Vikings Norsemen
 Islam Begins
 Ottoman Empire
 Reformation - Martin Luther
 Renaissance - The Masters



America Founding 3rd - 7th - 11th Grades

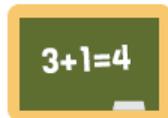
Age of Exploration
 America Colonized
 American Revolution
 Founding Fathers
 Constitution - Bill of Rights
 French Revolution
 Industrial Revolution
 Slavery Injustice
 Civil War Divides The Nation



Modern Times 4th - 8th - 12th Grades

Reconstruction
 Manifest Destiny
 Roaring 20's
 Great Depression
 World War 1 and 2
 Russian Revolution
 Communist China
 Cold War - Space Race
 Vietnam to 9/11

5 Interwoven Disciplines



Art - Music
Big Ideas
Great Literature
Values and Virtues
Great Men and Women

Rise & Fall of Civilizations
Inventions & Inventors
Astronomy
Science Advancements
Bio/Chem/Earth/Physics

Culture of the Day
Major Religions
Governments
Philosophers
Economies

What Is Classical Education?

6 Character Development Values and Virtue Education



Critical Thinking

Equip our Scholars with the Tools to decipher RIGHT from WRONG

CHALLENGE what is Presented with VERBAL and WRITING Proficiency

The Art of DEBATE Using Logical and Reason



Awareness of Others

Through the GREAT BOOKS, Scholars EXAMINE Character Through The Power of Story.

Awareness of Others -
The Golden Rule
The Golden Mean

Appreciation of the GOOD - TRUE - BEAUTIFUL



Life Long Learners

Instill WONDER and a JOY of learning by Making HISTORY come ALIVE.

Spark CURIOSITY
Go DEEPER as opposed to WIDER into Subject Matter.

Hands on Learning in the Arts, Music, Science and Athletics

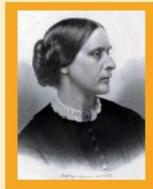
What Is Classical Education?

7 Classically Educated People from History



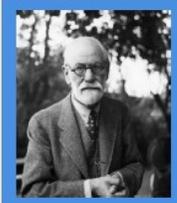
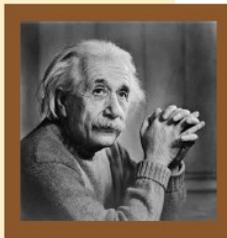
Renaissance

Leonardo daVinci
Copernicus
Martin Luther
Galileo
Christopher Columbus
Isaac Newton
Gutenberg
Shakespeare
Edgar Degas
Montesquieu



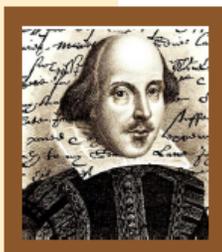
Founders

Samuel Adams
John Adams
James Madison
Thomas Jefferson
Alexander Hamilton
Susan B Anthony



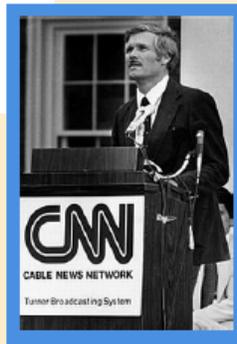
Writers and Thinkers

Fredrick Douglas
J.R.R. Tolkien
JK Rowling
Charles Darwin
Max Planck
C.S. Lewis
Sigmund Freud
W.E.B. Dubois (NAACP)
Nietzsche Voltaire
Emily Dickinson



Moderns Leaders

Albert Einstein
Dr. Martin Luther King
Alfred Hitchcock
Joe Paterno (Penn State)
Ted Turner (CNN)
Vince Lombardi
Pres. Calvin Coolidge
Pres. James Garfield
Pres. William McKinley
Pres. Woodrow Wilson





NORTH CAROLINA DEPARTMENT OF PUBLIC INSTRUCTION

Catherine Truitt, Superintendent of Public Instruction

www.dpi.nc.gov

2024 Charter Application Fee Payment Form

***Form must accompany payment (certified check or money order) for processing.

(Please Type or Print Legibly)

Name:

Joe Higgins

Phone:

520-631-7400

Name of Charter School:

Trinitas Classical Academy

E-mail:

joe@joehigginsinc.com

General Information

Non-Refundable Application Fee: \$1,000.00

Acceleration/Fast Track /Traditional Timeline Applicants: The Office of Charter Schools must receive your application fee and fee payment form no later than 5:00 pm. (EDT) April 26, 2024.

Payment Information

- Mail in Application Fee Payment Form with Certified Check or Money Order
- Facsimiles will NOT be accepted
- One registration form and fee per charter school

Payable To:

NC DPI
Office of Charter Schools
6307 Mail Service Center
Raleigh, NC 27699-6307

NOTE: Applications submitted without the non-refundable fee, result in fee being declined by the bank as insufficient funds, or submitted after 5:00 pm EDT on the appropriate deadline, will be deemed incomplete.

FOR DPI USE ONLY

Budget Code: 20200 45100047 08A0000 0821345 2000

OFFICE OF CHARTER SCHOOLS

Ashley Baquero, Executive Director | Ashley.baquero@dpi.nc.gov
6307 Mail Service Center, Raleigh, North Carolina 27699-6307 | (984) 236-2700
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Commercial

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FROM 85718



stamps.
endicia
04/18/2024

P

USPS PRIORITY MAIL®



Joe Higgins
Ethos Logos Publishing
4502 N HEATHERWOOD PL
TUCSON AZ 85718-6841

SHIP
TO:

NC DPI
Office of Charter Schools
6307 Mail Service Ctr
Raleigh NC 27699-6307

USPS TRACKING #



9405 5112 0620 4337 8877 62



P.O. Box 15115
Tucson, AZ 85708-0115

800.888.7882
VantageWest.Org

Check# 11 1011029491 \$1,000.00 Check Purpose 3042
Acct *****8628 Effect: 04/17/24 Post: 04/17/24 Tlr: 3042 ETHOS LOGOS PART

ID	DUE DATE	PRINCIPAL	INTEREST	FEES	NEW BALANCE	TRAN AMOUNT	SEQ

(See receipt for reference)
Payee: NC DPI

FCLASBS 12/09

HOLD DOCUMENT UP TO THE LIGHT TO VIEW TRUE WATERMARK

OFFICIAL CHECK

HOLD DOCUMENT UP TO THE LIGHT TO VIEW TRUE WATERMARK



P.O. Box 15115
Tucson, AZ 85708-0115

800.888.7882
VantageWest.Org

11 1011029491

91-7470/3221

DATE

04/17/24

\$1,000.00

PAY ** One Thousand and 00/100 DOLLARS **

NC DPI

RE: JOSEPH T HIGGINS
TRINITAS ACADEMY

TO THE
ORDER
OF

Scott Adams
AUTHORIZED SIGNATURE

Security Features on back

⑈ 101029491 ⑈ ⑆ 322174708 ⑆ 9000804075 ⑈



Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board must submit a completed background check that meets the following parameters:

- 1) Background check must include a Social Security Trace (which scans his/her SSN and lists every county/state of residence where that SSN has been used). [REDACTED]
- 2) Background check must include any additional aliases that have been used by the individual.
- 3) Background check must include a completed county level check for any county returned in the Social Security Trace.
- 4) Background check must include a completed nationwide check.

Certification Statement:

Note: To be completed individually by each proposed founding charter school board member. **Form must be signed by hand.**

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, James William Bowen III, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature James W. Bowen III Date 4/22/2024

I, _____, certify that I have been convicted of a misdemeanor or felony other than a minor traffic violation.

Signature _____ Date _____



Charter School Board Member Information Form

*Note: To be completed individually by each proposed founding charter school board member. Please include a **one-page** resume with this form and sign by hand.*

Serving on a public charter school board is a position of public trust and as a board member of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, and the school's fulfillment of its public obligations and all terms of its charter.

As part of the application for a new charter school, the State Board of Education requests that each prospective board member respond individually to this questionnaire. Where narrative responses are required, brief responses are sufficient.

The purpose of this questionnaire is twofold: 1) to give application reviewers a clearer introduction to the applicant team behind each school proposal in advance of the applicant interview, in order to be better prepared for the interview; and 2) to encourage board members to reflect individually as well as collectively on their common mission, purposes, and obligations at the earliest stage of school development.

School Information	
Name of charter school	Trinitas Classical Academy

Board Member's Information	
Board Members	Full name: James William Bowen, III "Will Bowen"
	Home Address: 117 W Morehouse Ave, Mooresville NC 28117
	Business Name & Address:
	Telephone No.: 252-432-0407
	E-mail address: jwbowen1745@gmail.com

Board Member Application

Have you previously served on a board of a school district, another charter school, a non-public school, or any non-profit corporation?

No:

Yes:

Educational History

Vance-Granville Community College, Associate in Arts (A.A.)

Employment History

For nearly nine years, I have worked with Congressman Patrick McHenry in a variety of roles. Previously, I served as the main constituent liaison for Cleveland, Lincoln, and Yadkin Counties. I currently serve as Press Secretary, while maintaining my outreach responsibilities in Iredell County. I have extensive expertise in communications and community outreach. I am currently responsible for drafting press releases, talking points, speeches, op-eds, newsletters, social media, and other written materials. I manage and evaluate incoming press requests to achieve optimal messaging. I cultivate and maintain relationships with districts and national media. I manage logistics of in-person and virtual press opportunities and other public-facing events.

How were you recruited to join this Board of Directors?

I am in Rotary with Dr. Boen Nutting.

<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I want to serve on the board because I want to help create more educational opportunities for families and encourage parents to be involved with their kid's education. I have heard families start homeschooling their kids because they cannot get their kids into an existing charter school and cannot afford private schools. This charter school would help so many families have a safe and encouraging place to send their kids.</p>
<p>How were you recruited to join this Board of Directors?</p>	<p>I am in Rotary with Dr. Boen Nutting.</p>
<p>Why do you wish to serve on the board of the proposed charter school?</p>	<p>I am a lifelong resident of North Carolina, and my family has made Mooresville our home. As a young father, I am very interested in school choice and the opportunities schools bring to families like mine.</p>
<p>What is your understanding of the appropriate role of a public charter school board member?</p>	<p>My role is to provide support for students and staff by having important discussions on how best to lead the school, use the resources available, and create a safe and creative learning environment.</p>
<p>Describe any previous experience you have that is relevant to serving on the charter school's board (e.g., other board service). If you have not had previous experience of this nature, explain why you can be an effective board member.</p>	<p>I have never served on a school board but as a young parent and active member of the Mooresville community, I bring a vision of what is needed in the community and feedback to the board about how we are perceived in the community. My current role is community outreach and communication, and I believe I can help the school with their enrollment plans.</p>
<p>Describe the specific knowledge and experience that you would bring to the board.</p>	<p>I believe I am a great fit for this board because of my strong values that match our mission, creative ideas to share, open mind to new ideas, unique perspective on different ways to learn/teach, desire to learn, team spirit, management knowledge and a determined attitude to succeed.</p>

School Mission and Program

Describe the vision, goals and program of the school's operation.

<p>What is your understanding of the school's mission and guiding beliefs?</p>	<p>Trinitas Academy mission is to provide an educational opportunity to families, one with a challenging curriculum and values of community, responsibility, diversity, safety, and personal growth. Our goal is to encourage and prepare students by providing them with well-trained teachers and a joy for learning. One of the big differences between our school and other schools is the partner with parents' approach. This approach is based on the Charlotte Mason and Classical Education model. Partnering with parents provides the opportunity for students to have more support and interest in their education.</p>
<p>What is your understanding of the school's proposed educational program?</p>	<p>The Classical Education model provides students with a well-rounded education, including Latin, music, art, as well as English, Math, and the Sciences. Classical including Latin, music, art, as well as English, Math, and the Sciences. Classical Education focuses on fostering creativity, curiosity, and character building to help students become great leaders in their respective fields.</p>
<p>What do you believe to be the characteristics of a successful school?</p>	<p>A successful school provides students with the tools and opportunities to succeed by helping them grow to be independent, responsible, brave, hardworking and creative helping them grow to be independent, responsible, brave, hardworking and creative leaders. Our school purpose is to offer students the ability to gain these tools and opportunities by providing a safe place where teachers and parents can encourage students to work hard and develop a love for learning.</p>
<p>How will you know that the school is succeeding (or not) in its mission?</p>	<p>Our enrollment and our resources are both doing exceptionally well. Our goal is to become one of the top schools in the region and have a well-rounded diverse population like the Mooresville community. Many exceptional teachers are attracted to the school and would make great additions to our program.</p>

Governance

<p>Describe the role that the board will play in the school's operation.</p>	<p>The board will provide guidance and leadership to create a solid foundation for fostering engagement of student learning and responsible use of the resources available.</p>
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How will you know if the school is successful at the end of the first year of operation?	Success would mean meeting enrollment of 468 students, finding a well-suited principle that has strong values that match our program, and full staff of well-trained teachers.
How will you know at the end of five years of the schools is successful?	The school's academic and financial targets were achieved. A full school, with low teacher turnover and delighted parents.
What specific steps will the charter school board need to take to ensure that the school is successful?	Our objective is to find amazing teachers, Admin and Principle. The team we have, and the location are amazing!
How would you handle a situation in which you believe one or more members of the school's board were acting unethically or not in the best interests of the school?	I would either raise the ethics issue at the full board meetings or consult with the chair for guidance and direction of what we should proceed.

Certification

I, James William Bowen III, certify to the best of my knowledge and ability that the information I am providing to the North Carolina State Board of Education as a prospective board member for Trinitas Classical Academy Charter School is true and correct in every respect.

Board Member's Signature

Signature <u>James W. Bowen III</u>	Date <u>4/22/2024</u>
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**If you responded within the application that disciplinary action has been taken against any past or present professional licenses, provide a detailed response below outlining the disciplinary action and the license validity. [Click or tap here to enter text.](#)*



April 1, 2024

North Carolina Department of Public Instruction

We at Ambassador Christian High School are thrilled to offer our full support for the establishment of your new K-8 classical charter school, Trinitas Academy, in the growing Lake Norman community. As a private high school that leans heavily on classical teaching methods, we are excited to see another institution dedicated to providing families with this valuable approach.

The classical model of education aligns with our mission and portrait of an Ambassador graduate. We believe this time-tested academic approach equips students with the critical thinking skills, deep knowledge, and the eloquence needed to become true leaders and engaged citizens. By cultivating the whole child - intellectually, morally, and spiritually - classical education lays a strong foundation for future success.

The Lake Norman region has seen tremendous growth in recent years, and with that growth comes an increased demand for high-quality school options that cater to diverse educational philosophies. Trinitas Academy's focus on the classical tradition will provide families with an important alternative to standard curriculum, empowering parents to choose the learning environment that best fits their child's needs and aspirations.

We are eager to support your efforts in any way we can, whether through sharing best practices, collaborating on extracurricular activities, and certainly through creating pathways for your graduates to continue their education at Ambassador. The success of Trinitas Academy is vital not only for the families it will serve, but for the broader educational landscape of our community. Furthermore, we are happy to see the Mt. Mourne schoolhouse given new life as a vibrant educational resource for the community.

Please let us know how we can be of assistance as you work to bring this vision to life. We stand ready to champion your cause and look forward to a fruitful partnership in the years to come.

Sincerely,

Melisa Gibbs
Co-Founder; Ambassador Christian High School



April 11, 2024

As the passionate owner and dedicated director of the esteemed ArenaLKN (<https://www.arenalkn.com/>) in Mooresville, NC, I am thrilled beyond measure to express my unbridled enthusiasm for the remarkable new classical charter school, Trinitas Academy. It is with profound pleasure and deep conviction that I provide this heartfelt letter of recommendation.

At ArenaLKN, our very essence revolves around our fervent belief in the transformative power of education and youth sports development. We are driven by a commitment to shaping the minds and characters of our youth. And now, as I witness Trinitas Academy's dedication to these same principles, I am filled with an overwhelming sense of excitement in our strategic partnership.

We have witnessed firsthand the immeasurable benefits that arise when homeschool and traditional school students come together. This fusion creates an environment that is not only educationally diverse but also incredibly enriching for all involved. Trinitas Academy's visionary model of seamlessly integrating these two educational approaches is nothing short of revolutionary. It will undoubtedly serve as an invaluable asset for our classical homeschool students, empowering them to actively participate in our esteemed sports programs and unlock their full potential within our exceptional facilities.

As an integral part of the cherished Mooresville community, ArenaLKN has fostered deep-rooted relationships and connections. Our hearts are brimming with excitement and anticipation at the prospect of partnering with Trinitas Academy, for we wholeheartedly believe in the transformative power of education and the indomitable spirit of youth sports development. Together, we will provide Trinitas students with unparalleled opportunities to develop their athletic prowess, cultivate essential life skills, and nurture their character through our exceptional programs.

I am firmly convinced that the partnership between ArenaLKN and Trinitas Academy will yield immeasurable rewards for both institutions. This collaboration will not only allow us to serve our beloved community but also propel Trinitas Academy's noble mission of delivering a world-class, classical education to soaring heights.

John Germinario

Owner and Director, ArenaLKN

Dear North Carolina State Board of Education

I am writing in support of the opening of Trinitas Academy in Mooresville, North Carolina. I am a pastor of the local Church across the street from the current proposed location of the Academy. I believe firmly in the importance of providing quality education in the community. I know that they would be a welcomed and much need addition to this community, and the families here in Mount Mourne, NC.

The current status of education systems in this area, like many in the state, is heavily impacted by the current social, economic and unfortunately political issues flooding our system. Students are struggling not only to learn the basic of education but navigate issues that adults are poorly equipped to tackle; much less educate morality. Classic education aims to provide students a curriculum that helps them with their own critical thinking, teaching them to use analytical skills to better understand the classic education curriculum.

The goal of Trinitas Academy is to produce great thinkers. We cannot do that with a one size fits all mold which seeks to create skilled factory workers not free and innovative thinkers. Trinitas Academy is going to provide a fresh expression of education that is tailored to the needs of the individual student which can vastly improve the student's overall education.

I also find Trinitas Academy's drive to promote civic virtues, a sense of community and love of neighbor commendable. We need to prepare our children with strong values and strong base to which to navigate this world. Our responsibility as parents, community leaders and as schools systems should always be about building up the next generation so they can make their own choices. What we teach them will guide not only their grades but the character of the nation and world we live in today and tomorrow.

I would like to again urge you to consider the request of Trinitas Academy to join our community in Mount Mourne, NC. Trinitas Academy would be a great benefit to our community and to students that attend. I pray that they will not only get approval but that they might serve a model for other schools in the future.

Respectfully submitted


Rev. Nathan Finsel

1430 Mecklenburg Hwy
Mooresville, NC 28115
revnfinsel@gmail.com



community preschool

HUNTERSVILLE

April 24, 2024

Dear Trinitas Academy,

I am writing to enthusiastically recommend your school to the families I serve at the Community Preschool of Huntersville. As the Owner/Director of our preschool, which focuses on the latest research and strategies for child development, I have been extremely impressed with the academic rigor and character-building emphasis at Trinitas Academy.

Our school has experienced tremendous growth, as more and more families in the Huntersville area seek out the high-quality, developmentally-appropriate early childhood education we provide. We are bursting at the seams, with waiting lists for many of our classrooms. Clearly, there is a strong demand in our community for the kind of exceptional educational experience that Trinitas Academy offers.

That is why I have made it a priority to educate the Trinitas team on the unique needs and priorities of families in our local area. I have enjoyed getting to know your administrators and leadership team, and sharing insights into the educational landscape here in the Lake Norman region. Your willingness to learn about our community and collaborate with us has been greatly appreciated.

I am confident that the families I serve would find Trinitas Academy to be an ideal fit for their children as they transition from our preschool. Your classical curriculum, emphasis on character development, and commitment to academic excellence are perfectly aligned with the values we instill in our students. I know my families would thrive in your nurturing, supportive environment.

Please let me know if you have any other questions. I would be happy to provide any additional information or facilitate an introduction between your team and the parents I work with. It is my sincere hope that we can continue to work together to provide the children in our community with the very best educational opportunities.

Sincerely,

Kyshia Brassington
Owner/Director, Community Preschool of Huntersville

North Carolina Charter School Board
301 N. Wilmington Street
Raleigh, NC 27601-2825

April 23, 2024

Dear Chair and Board of North Carolina Charter Schools,

I am writing to express my support for Trinitas Academy Charter School. As a resident of Iredell County and in my role with United Way of Iredell County I get the opportunity to talk with many members of this community about their wishes or their children and the barriers that stand in the way of success for families and children in our community. I believe that Trinitas Academy will be an asset to my community and add to the options currently provided by our excellent public-school systems.

Trinitas Academy will provide an option to families both from Iredell and across the northern Mecklenberg region, one with rigorous academics and core values of safety, community, diversity, fun, and personal growth. High standards combined with a rigorous, time-tested curriculum will prepare students for success in college and career and create contributing citizens.

I support the approval of Trinitas Academy to serve students in our community. I value the mission and approach of Trinitas and I would be pleased to see a school of choice in the community.

Sincerely,

A handwritten signature in black ink that reads "Brett Eckerman". The signature is fluid and cursive, with a long horizontal flourish extending to the right.

Brett Eckerman
2488 Marthas Ridge Drive
Statesville, NC 28625
Brette2001@yahoo.com

April 24, 2024

North Carolina Department of Public Instruction
301 N. Wilmington Street
Raleigh, NC 27601-2825

Dear Carolina State Board of Education,

As a resident and former mayor with the Town of Mooresville, I am absolutely thrilled with the enormous possibilities of Trinitas Academy to be a powerful addition to the choices within the Iredell school district. I believe a public Classical school in Mooresville is long overdue, and that it will add significantly to the educational opportunities for a wide range of students through a time-tested and research-based model of education. Therefore, I fully support Trinitas Academy's charter request to move to our community and want to thank you for your kind and encouraging consideration of this school's request.

Please feel free to contact me anytime with any questions.

Sincerely,

Miles Atkins
353 S. Academy Street
Mooresville, NC 28115
704-500-9730
Miles_Atkins@yahoo.com

North Carolina Charter School Board
301 N. Wilmington Street
Raleigh, NC 27601-2825

North Carolina Charter Board Members,

My name is Dr. Kenny Miller, I recently retired after 50 years of service from the Iredell Statesville School District. In my tenure with the school system I served 22 years as Assistant Superintendent of Facilities and Planning. We had 37 schools in the district and I oversaw all aspects of site location, construction, maintenance, and safety at all facilities. I worked closely with the International Baccalaureate Principal, Dr. Boen Nutting when she was Principal at the Mt. Mourne campus.

I have overseen multiple additions, upgrades and improvements made to the Mt. Mourne campus during my tenure. We closed the school in 2020 moving the program from Mt. Mourne to its current location at the improved Brawley School location on Brawley road. The relocation was due to high demand and increased enrollment. At its peak, the Mt. Mourne school had over 500 students in the middle grades (6th thru 8th) International Baccalaureate program. Previous to the IB program it was a K-5 elementary housing almost 800.

The campus was maintained and inspected when not occupied by the system to insure the building and systems remained in excellent condition. The local fire department, city & county building inspectors, State Insurance inspector and State Boiler / Pressure vessel inspector have visited when needed as upgrades are made to insure compliance and to maintain occupancy requirements. The building was never taken out of service and has a current tenant leasing space, so the Certificate of Occupancy approvals on hand are up to date.

Since retiring from the district, I have been working with the Trinitas Academy group and the building owner reviewing all the systems and continuing the updating and improving of the campus. Since 2022 the following maintenance and improvements on the Mt. Mourne campus are complete or scheduled to be complete before the potential opening of school 2024 / 2025 should it be approved:

- New roofing in the back portion of the campus is complete and will result in all roofing replaced within the last 5 years
- HVAC – replace outdated controls with new DDC control system; perform maintenance on Air Handler Units in every classroom; replacing pumps where needed and clean up and preventive maintenance to Boiler & Chiller.
- Painting through some of the building with full paint to be completed by summer of 2024.
- Floor stripping and waxing – as well as replacement in specific areas to be completed by summer 2024

- Removal of the commercial kitchen in preparation for a vendor to work with the school on food services.
- Upgrade of existing Fire Panel with New programable fire panel (fully monitored)
- Review by the Mooresville Fire Department of the fire system to ensure up to date compliance.
- Redesign of the traffic system on the campus to improve stacking for pick up / drop off and improve student safety
- New Security and Camera system for improved safety
- School safety improvements already in place (identification and electronic control of entry access; ballistic film; panic button; limited key access)
- Fencing of campus and traffic access control will be part of the site improvements to be completed prior to school opening

Prior to the Trinitas Academy opening, the school will have the following items done in preparation for their academic program.

- Internet and network system reviews and upgrades
- In classroom projectors, phone systems, bell systems and communication.
- White boards and furniture for students and teachers are installed in each used classroom.
- Lunchroom capacity to meet the needs of the students (kitchen and dining area)
- Security fencing to create a closed campus environment.
- Security camera placement adjustments as needed.
- Play system installed for the younger students.

If you have any questions about the work done or the history of the building, don't hesitate to contact me at Mobile Phone: 704-902-4566 or Email: kennymllr@aol.com

Sincerely,

Kenny Miller, Ed.D

Facilities & Planning Consultant

Special Education Students

Board Chair, Mark Lockman has experience in the local school district (Iredell Statesville School District) as an administrator in charge of implementing the State of North Carolina's first district wide assessment plan. This assessment included identifying and monitoring IEP, 504, and special populations. This experience dates back to the early 2000s and changes in Special Education law have evolved substantially. The Trinitas Academy Principal, Dr. Boen Nutting, has over 30 years of experience as a Principal and district Assistant Superintendent with the Iredell Statesville School District. Her direct oversight of Special Education students will be instrumental in implementing the following plan.

The learning community of Trinitas Classical Academy will consist of students with a wide range of learning abilities and special needs. The leadership of Trinitas Academy has built a special populations program that considers best practice, outlined in the NC Policies Governing Services for Children with Disabilities. goals and frameworks, and Federal rules and laws including: Title VI of the Civil Rights Act of 1964 and Title IX of the Education Amendments of 1972, which prohibit discrimination based on race, color, sex, and national origin. Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990, which prohibit discrimination based on disability. Title VI of the Civil Rights Act of 1964 the Equal Educational Opportunities Act of 1974 (EEOA), and the Individuals with Disabilities Education Act (IDEA).

Our school anticipates that 8-9% of our student population will qualify for IEP services. Students with special needs will receive the services outlined in their Individual Education Plan (IEP). Our teachers will work closely with administration, Special Education teachers, contracted service provider, parents and any IEP team member(s) to ensure that the implementation of an IEP is effective and meets the requirements stated in the document. Specific training through experts in the field of Special Education will be made available to the faculty and staff of Trinitas Academy to both meet the needs of the special needs student and to meet all state and federal laws regarding Special Education. IEPs will be reviewed and categorized annually by special education staff, and educational evaluations will be performed by a school psychologist or other related service providers as needed.

Year 1, we have budgeted to hire a Special Education Specialist and a SPED Assistant as needed. The Superintendent will locate, and contract outside SPED specialists as needed to include, Speech Therapists, Occupational Medicine Therapists, Psychologist. Trinitas Academy will hire a certified Special Education Teacher and one paraprofessional who will be responsible for managing the special education needs of the projected enrollment.

Individual Education Plan (IEP) – Free and Appropriate (FAPE) and Least Restrictive Environment

The protocol for placing students with IEPs will be the following:

The placement decision for each child will be:

- Made by a group that includes: Trinitas Academy school staff including the Special Education team and allied third party professionals (Speech Path, School Psych, Occ Med etc.) The parents and other persons knowledgeable about the child, about the meaning of the evaluation data, and about the placement options
 1. b) In conformity with the Least Restrictive Environment provisions of the IDEA regulations.
 2. c) Determined at least annually.
 3. d) Based on the child's IEP.
- Unless the IEP of a child requires some other arrangement, the child will be educated in the Trinitas Classical Academy classroom environment.
- In selecting the Least Restrictive Environment, consideration will be given to any potentially harmful effect on the child or on the quality of services that she or he needs.
- A child with a disability will not be removed from age-appropriate regular classrooms solely because of needed modifications in the general education curriculum.

Identification and Screening of Students

As required by school policy and Federal law, Trinitas Academy must ensure that a free appropriate public education (FAPE) is available to all children with disabilities, even those attending private schools and home schools, regardless of the severity of the disability and those who are in need of Special Education and/or related services, are identified, located and evaluated.

1. Trinitas Academy will establish, implement, and disseminate to its school-based personnel and all parents written procedures for the identification and referral of all children with disabilities aged Kinder through 8th.
2. Trinitas Academy will require all school-based staff to review the written procedures related to child identification and referral annually. It will maintain documentation of the staff review.
3. Identification (screening for possible disabilities) shall be completed within 45 calendar days after:
 - a) Entry of each kindergarten student and any student enrolling without appropriate records of screening, evaluation, and progress in school or
 - b) Parent notification of concern regarding developmental or educational progress by their child grades kinder through 8th.

Screening procedures shall include vision and hearing status and consideration of the following areas:

1. Cognitive or academic.
2. Social or behavioral, and
3. Adaptive development (504 plan eligibility).

4. Our team shall review enrollment data and educational performance in the prior school for a student transferring into our school. Suppose a student not currently eligible for special education has a history of special education or poor progress. In that case, the student's name shall be submitted to the administrator for consideration of the need for a referral for a full and individual evaluation or other services.
5. Suppose a concern about a student is identified through screening procedures or review of records. In that case, the parents of the student shall be notified of the concern within 10 school days and informed of the public agency's procedures to follow up on the student's needs. Parents will be notified and invited to participate in the RTI meeting along with special education staff, school psychologists, and/or related service providers to discuss the student's progress in school and create a plan to best support their students' learning. Families will be notified by U.S. Mail, and a face-to-face meeting will be held with the Trinitas Academy Principal at the start of an SPED intervention or during a change of intervention protocol. The notice will be provided in the parent's native language as necessary, and the assistance provided will be described, including intervention strategies as well as the RTI strategies employed thus far. The notification and plan will include a timeline with progress monitoring.
6. Trinitas Academy will maintain documentation (within the chosen platform, eSPED) of the identification procedures utilized, the dates of entry into school or notification by parents of concern, and the dates of screening. The dates shall be maintained in students' permanent records.

Least Restrictive Environment – Inclusive Focus

The Trinitas Academy Special Education/ELL team will meet regarding students identified and classified as needing either IEP or 504 accommodations. These meetings will occur every two weeks to review the progress of at-risk students who are underperforming in class and on assessments using a modified Response to Intervention (RTI) model to support students with the interventions needed for achievement.

At the study team's direction, the teacher and the Special Education team have tools for students with IEP's include dedicated student hours with the classroom teacher, differentiated instruction and parent partnering. The study team will meet and evaluate student data to determine progress and next steps. The next steps are to increase student hours and/or target instruction through the reading interventionist or complete an evaluation for the purposes of consideration of qualifying special education service at Trinitas Academy.

The Trinitas special education team will service the student with the IEP-directed number of additional minutes of instruction. A pull-out of the classroom model may be the best option for IEP students. Once in the special education department, there are some curriculum and digital curriculum options for student instruction.

Children with disabilities, including children in public or private institutions or other care facilities, will be educated to the maximum extent appropriate with children who are not

disabled in accordance with §§300.114–300.117 of the IDEA regulations. Depending on the scope of the IEP requirements, Trinitas Academy will make every effort to service children with disabilities in the classroom with their peers. A continuum of alternative placements will be made available to meet the needs of children with disabilities for special education and related services.

Content and Delivery Modifications

Teachers will utilize a variety of tools to provide special education for students within the classroom environment. Every effort will be made to support teachers in finding solutions with the tools and support they need to individualize learning for students with special needs effectively:

- Utilize flexible classroom models. Our Ethos Logos and Schoology LMS delivery plan allows for seamless tracking, modification, and customization between the classroom teachers and special education departments.
- Address IEPs with personalized learning plans.
- Engage all learning styles with a variety of instructional modalities.
- Differentiate instruction with meaningful assessment.
- Measure gains with real-time reporting.

Progress Monitoring of Special Education Population

The evaluation process for Special Education students will include grades and reporting from the classroom teacher as well as quarterly reports from the Trinitas Special Education team.

Trinitas Academy will contract with e-IEP Pro for the management of all students with Individualized Educational Plans (IEA) and 504 plans. The key benefits of e-IEP Pro include:

- All student data is managed in a central location. Easy access from any computer or mobile device.
- Allows all stakeholders quick and easy access to student IEP's, 504s and more.
- Notification of due dates, such as meetings, IEP and MET review due dates, and 504 plans.
- Provides for documenting assessment data and eligibility data for each special education student.
- Easy paperless transfer of electronic student records
- Document locking feature allows IEP teams to lock down documents to protect data integrity.
- Integrated training videos and software support section available to all users 24/7.
- Notify parents as to progress and any potential changes to the intervention plan.

Students already enrolled in the Trinitas Academy special education programs will be monitored with quarterly progress reports, which will be documented and shared with the

classroom teacher, administration, and the parents/guardians of the student. Annual reviews of the IEP will occur, and determinations will be made if reevaluations and adjustments are required.

Assessments utilized to determine eligibility (not limited to this list)

- Wechsler Intelligence Scale for Children – Fourth Edition
- Wechsler Nonverbal Scale of Ability
- Woodcock-Johnson – Normative Update Complete
- Test of Written Language – Fourth Edition
- Vineland Adaptive Behavior Scales – Second Edition
- Diagnostic Adaptive Behavior Scale
- Speech and Language evaluative tools
- Clinical Evaluation of Language Fundamentals – Fifth Edition
- CAAP-2
- MindPrint Learning

Progress monitoring of special education populations will occur in the same manner and fashion as all Trinitas Academy students. Benchmark assessment data (DIBLES for early reading, NWEA-MAP for standards mastery) will be compiled quarterly. The Special Education and or ELL staff will follow the 8-step data analysis process, which all teachers in the school follow. The final report on student progress, goal-setting plan, and strategy prescribed to improve academic outcomes will be presented to the Academic Accountably Committee for review and monitoring.

Special Population Staffing:

As reflected in this application's budget and employee section, staff increases proportionally to the increases in enrolment.

To staff our K-8 school for special education needs with a population of 9% of our total enrollment, we are budgeting services for speech pathology, psychology, and occupational therapy. The following are the estimated staffing requirements:

Certified Staffing:

For English as a New Language (ENL) programs, staffing includes certified ESOL teachers for stand-alone ENL and dually certified teachers for integrated ENL. This position will be filled based on our enrolled student population.

Special Education Departments typically involve staff members like Special Education Resource Teachers, Department Chairs, and Coordinators. These positions will flex with our enrolled demographic and identification of IEP, 504, and EIs.

- **Special Education Teacher:** Hiring a Special Education Teacher is crucial to overseeing the individualized education plans (IEPs) of students with special needs.
- **Support Staff:** Consider hiring speech pathologists, psychologists, and occupational therapists to provide specialized services to students with diverse needs.
- **Contractors:** Utilize contractors for specialized services like speech therapy or occupational therapy to supplement the school's staff.
- **Compliance and Regulations:** Ensure compliance with state regulations regarding staffing requirements for special education programs to meet students' needs effectively. Our Special Education staff will manage compliance.

By blending certified staff with contractors for specialized services, a K-8 school can effectively cater to the diverse needs of our projected students requiring special education services in areas like speech pathology, psychology, and occupational therapy.

<u>Teaching Staff</u>	<u>Year 0</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Year 4</u>	<u>Year 5</u>
Core Classroom Teachers (inc lang, art, specials)	24	28	34	38	40	
Special Education	2	2	3	4	4	
Intervention	1	1	2	2	2	
ELL Specialist	1	1	2	2	2	
Teaching Aides or Assistants	4	4	6	6	6	

There are no third party consultants working on this application.

Charter School Board Member Background Check Form

Board Member Background Check

Each member of the founding board **must** submit a completed background check that meets the following parameters:

- 1) Background check must include a **Social Security Trace** (which scans his/her SSN and lists every county/state of residence where that SSN has been used).
- 2) Background check must include any **additional aliases** that have been used by the individual.
- 3) Background check must include a completed **county level check for any county returned in the Social Security Trace**.
- 4) Background check must include a completed **nationwide check**.

Certification Statement:

Note: To be completed individually by **each** proposed founding charter school board member. ***Form must be signed by hand.***

If a board member has been convicted of a misdemeanor or felony other than a minor traffic violation, attach a separate sheet listing the year of the charge, the charge, the verdict, and the final disposition.

I, Mikail Clark, certify that I have not been convicted of any misdemeanor or felony other than a minor traffic violation.

Signature



Date 4/11/24



City/States/Counties at which I have resided during last 10 years:

- Charlotte, Mecklenburg County, NC
- Charleston, Kanawha County, WV
- Bedford, Bedford County, VA
- Lynchburg, Lynchburg City, VA

**AMENDMENT TO THE
BYLAWS OF
CLASSICAL EDUCATION SCHOOLS OF NORTH CAROLINA
A NON-PROFIT CORPORATION**

The Bylaws of Classical Education Schools of North Carolina are amended as follows:

FIRST: Article II, Section 2.13 shall be added to the Bylaws of Classical Education Schools of North Carolina as follows:

Section 2.13 OPEN MEETINGS: The Board of Directors and the Corporation commit to adherence of all North Carolina open meeting laws subject to the North Carolina General Statutes Chapter 143, Article 33C, and any applicable revisions thereof.

SECOND: Except insofar as said Bylaws are expressly or by necessary implication changed by this Amendment and are in conflict therewith, the Board hereby ratifies, republishes, and reaffirms the said Bylaws and each and every part thereof.

This Amendment to the Bylaws becomes effective immediately upon approval by the Board of Directors.

This Amendment to the Bylaws is effective as of May 16, 2024.



Name: Mark Lockman

Title: President

CONSENT OF BOARD OF DIRECTORS OF
CLASSICAL EDUCATION SCHOOLS OF NORTH CAROLINA.
TO ACTION WITHOUT A MEETING

We, the undersigned, being all of the Board of Directors of Classical Education Schools of North Carolina, do hereby adopt the following resolutions in lieu of holding a meeting, by signing our written consent thereto:

WHEREAS, the Directors, believe it to be in the best interests of the corporation to amend the Bylaws of the corporation to implement a provision directing commitment and adherence to North Carolina open meeting law pursuant to North Carolina General Statute Chapter 143, Article 33C;

WHEREAS, Bylaw ARTICLE II, MEETINGS & RECORDS, currently does not have a section directing statutory commitment of North Carolina open meetings law;

WHEREAS, the proposed Bylaw ARTICLE II, MEETINGS & RECORDS, SECTION 2.13 OPEN MEETINGS, would be inserted to read as follows:

“The Board of Directors and the Corporation commit to adherence of all North Carolina open meeting laws subject to the North Carolina General Statutes Chapter 143, Article 33C, and any applicable revisions thereof.”

RESOLVED, that Bylaw ARTICLE II, MEETINGS & RECORDS, SECTION 2.13 OPEN MEETINGS, be and hereby is amended as proposed to reflect the following:

“The Board of Directors and the Corporation commit to adherence of all North Carolina open meeting laws subject to the North Carolina General Statutes Chapter 143, Article 33C, and any applicable revisions thereof.”

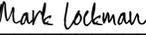
FURTHER RESOLVED, that the officers be and hereby are authorized to execute such documents and take such actions as they, in their discretion, shall deem to be necessary or appropriate in order to effect the intent of this resolution.

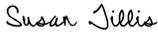
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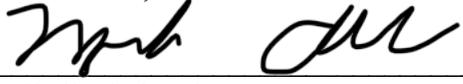
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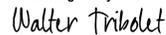
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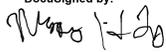
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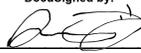
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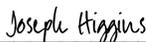
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Susan Tillis, Director


Mikail Clark, Director

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Marcus Long, Director

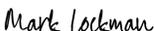
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Anthony Famiglietti, Director

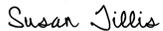
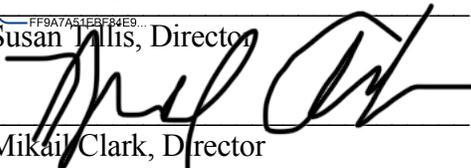
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Joseph Higgins, Director

Waiver of notice of time and date of meeting:

DocuSigned by:

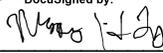
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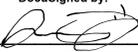
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Susan Tillis, Director


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Anthony Famiglietti, Director

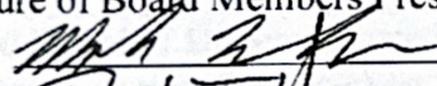
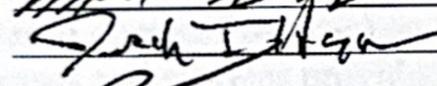
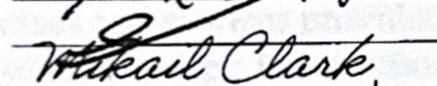
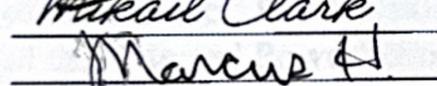
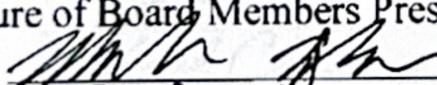
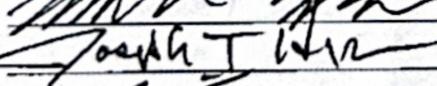
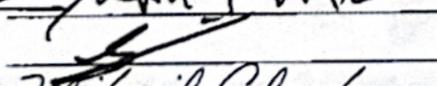
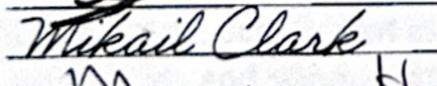
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Joseph Higgins, Director

Charter School Required Signature Certification

Note: Outlined below is a list of areas that must be certified by the proposed Board of Directors. Any forms Not Applicable to the proposed charter school indicate below with N/A and provide a brief explanation for providing such response.

Serving on a public charter school board is a position of public trust and board members of a North Carolina public charter school; you are responsible for ensuring the quality of the school's entire program, competent stewardship of public funds, the school's fulfillment of its public obligations, all terms of its charter, and understanding/overseeing all third-party contracts with individuals or companies.

- ❖ The selected Board Attorney that he/she has reviewed with the full Board of Directors, listed within the application, all the governance documents and liabilities associated with being on the Board of a Non-Profit Corporation.
 - Name of the Selected Board Attorney: Kevin Donaldson PLC
 - Jones Childers Donaldson and Webb
 - Date of Review: April 1, 2024
 - Signature of Board Members Present (Add Signature Lines as Needed):
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- ❖ The selected Board Auditor that he/she has reviewed with the full Board of Directors, listed within the application, all the items required for the annual audit and 990 preparations.
 - Name of the Selected Board Auditor: Sharp Patel CPA
 - Date of Review: April 1, 2024
 - Signature of Board Members Present (Add Signature Lines as Needed):
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❖ If contracting with a CMO/EMO, that the selected management company has reviewed with the full Board of Directors, listed within the application, all the items required and the associated management contract and operations.

- Name of the Contact for Selected EMO/CMO: Not Applicable
- Date of Review: NA

- Signature of Board Members Present (Add Signature Lines as Needed):
 - [Signature]
 - Mikhail Clark
 - _____
 - _____

❖ If contracting with a financial management service provider that the selected financial service provider has reviewed with the full Board of Directors, listed within the application, all the financial processes and services provided.

- Name of the Contact: None selected
- Name of the Selected Financial Service Provider:

- Date of Review: NA

- Signature of Board Members Present (Add Signature Lines as Needed):
 - [Signature]
 - [Signature]
 - Mikhail Clark
 - _____

❖ If the proposed Board of Directors, listed within the application, is contracting with a service provider to operate PowerSchool that the service provider has reviewed all of the financial processes and services provided.

- Name of the Contact: Powerschool
- Name of the Selected PowerSchool Service Provider: Powerschool Direct
- Date of Review: 4-1-2024
- Signature of Board Members Present (Add Signature Lines as Needed):

- [Signature]
- [Signature]
- Mikhail Clark
- Marcus H. [Signature]

Certification

I, Mark Lockman, as Board Chair, certify that each Board Member has reviewed and participated in the selection of the individuals and vendors attached to this document as evidenced by the full Board of Director signatures outlined above. The information I am providing to the North Carolina State Board of Education as Trinitas Classical Academy Charter School is true and correct in every respect.

Signature Mark Lockman

Date: 4-1-2024

Q258. Board chair, please digitally sign your application here.

I, Mark Lockman, signing this charter application on behalf of the governing board of Classical Education Schools of North Carolina, dba Trinitas Classical Academy.



Mark Lockman

Date: