

# Application: Vertus Charter Middle School

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New Charter School Applications

## Summary

ID: 7879213348

Status: Full Application Review

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## Full Application Cover Page

Completed - Jul 2 2025

### Applicant Instructions

Complete the Full Application Cover Page as a form within the portal  
(See <http://www.p12.nysed.gov/psc/startcharter/2021/2021CSRFPStandard3.pdf>)

## FULL APPLICATION COVER PAGE

**PROPOSED CHARTER SCHOOL NAME:** Vertus Charter Middle School

1. My applicant group is best described as: 1) *a new operator* applying to establish a new charter school or 2) *an existing BOR-authorized education corporation/management company seeking to replicate or add to a network* of existing charter schools?

New Operator Applying to Establish a New Charter School

1a. If applicable, what is the name of the proposed management company or network that the proposed school seeks to contract with?

(No response)

2. If applicable, what is (are) the name(s) of the proposed Partner Organization(s)?

(No response)

### 3. Proposed Board Chair and Public Contact information

	Proposed Board Chair Name	Email Address	Phone Number
	Victoria Van Voorhis		

	Public Contact Name	Email Address	Phone Number
	Julie Locey	<a href="mailto:jlocey@vertusschool.org">jlocey@vertusschool.org</a>	585-362-1998

### 4. District/Community School District of Location

	Proposed District of Location	
	Rochester CSD	If other, please specify here

5. Charter schools authorized by the Board of Regents in June or November 2021 should plan to open for instruction in 2022. If issued a charter, the initial 5 year charter term begins on the first day the school opens for instruction and ends on June 30, 2027 of the 5th year of operation.

Start date of initial term (1st day of school)

Sep 8 2027

End date of initial charter term

**06/30/2030**

## 6. Projected Enrollment Table Over the Charter Term

(Leave unused cells blank)

Grades	Ages	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
K						
1st						
2nd						
3rd						
4th						
5th						
6th						
7th				95	95	95
8th					95	95
9th						
10th						
11th						
12th						
Ungraded						
Total		0	0	95.0	190.0	

## 7. Mission Statement

A school's mission statement provides the foundation for the entire charter application and for the full term of the school's charter. All elements of the school design should align with and support achievement of the proposed mission. Schools must also determine how they will evaluate and be held accountable for achievement of their mission. Schools must present the goals they intend to use to measure student achievement, the overall educational program, and the key components of the school design in alignment with the mission.

Preparing leaders of character for the community and workplace.

### Priority School Designs Aligned with Regents Strategic Priorities

#### Responses Selected:

Career and technical education (CTE) models that have sought or will seek NYSED CTE program approval;

Over-age, under-credited (transfer) high schools;

**Key Design Elements (Please provide a brief descriptive name or phrase for each key design element - sufficient for the reviewer to have a clear understanding. Fuller descriptions should be presented in the narrative).**

1	Strong Relationships
2	Personalized Year-Round Academics
3	Character Education
4	Career Preparation
5	(No response)
6	(No response)
7	(No response)

**THANK YOU!**



## Application Summary

For years, families have asked Vertus to serve middle grades, seeking earlier access to the school's proven model of structure, support, and success. Vertus Charter Middle School (Vertus Middle) is a direct response to that demand. The proposed school will extend the high school's strong academic foundation, mentorship, and character development to 7<sup>th</sup> and 8<sup>th</sup>-grade male students.

**Mission and Objectives:** Vertus Middle prepares leaders of character for the community and the workplace. This mission is deeply aligned with the goals of the New York Charter Schools Act. The proposed school will improve student achievement, increase learning opportunities for students at risk of failure, encourage innovative teaching methods, offer families a desperately needed choice, create new professional opportunities for educators, and hold itself fully accountable for results.

Vertus Middle will measure its success through clear, mission-driven goals that emphasize rigorous academics, strong student engagement, and readiness for high school and beyond. The school will ensure students make more than a year's expected growth in ELA and Math each year, aiming for at least 60% of students to meet growth targets and state proficiency benchmarks in Grades 7–8. To strengthen character and engagement, Vertus Middle will reduce chronic absenteeism below 30%, keep suspension rates under 5% through restorative practices, and retain over 85% of students each year. Every student will participate in hands-on, project-based career exploration each semester, while annual surveys will show that at least 80% of families and students feel the school is safe, supportive, and builds confidence and character. Vertus Middle will also uphold strong operational standards by balancing its budget each year, maintaining clean audits, and keeping healthy reserves.

**Key Design Elements:** Vertus Middle will adapt the four key design elements/pillars of Vertus Charter School's model to ensure that middle-grade students are prepared for a seamless transition into high school and beyond. Our model includes programming that is tailored to meet the needs of each student, with a specific focus on personalized, hands-on education that supports both academic and character development. **1. Strong relationships:** Each student will join a small learning team of 16–20 students and be paired with a dedicated Preceptor, a trusted mentor and role model, who guides them throughout the day. With a 6:1 student-to-staff ratio, every student will have strong, caring relationships and daily support. Staff will use empathetic listening and shared problem-solving to help students work through challenges and stay engaged, providing consistent support in and out of school. **2. Personalized year-round academics:** Vertus Middle's 200-day school year and flexible Learning Labs will ensure each student follows a personalized plan that addresses skill gaps and builds on strengths. Live instruction, adaptive technology, and project-based work will help students catch up and stay on track for high school success. **3. Character education:** Regular seminars, one-on-one Preceptor meetings, and community service will build the school virtues like courage, leadership, and responsibility. Students will grow core character traits: grit, self-control, curiosity—and learn what it means to lead themselves and serve others. **4. Career preparation:** Vertus Middle students will connect learning to real life through career exploration each semester. Workplace visits, projects, and

guest speakers will help students see how schoolwork links to future jobs and build early skills for success beyond high school.

**Student Communities to Be Served:** Vertus Middle will serve young men in grades 7 and 8 in Rochester who face significant academic, social, and economic barriers to success. These students are often academically behind, disproportionately affected by poverty, and at high risk of becoming overage and under-credited before reaching high school. Many struggle with chronic absenteeism, high suspension rates, and low proficiency in core subjects, challenges that are especially low for boys of color in the Rochester City School District (RCSD), where only 12% of 7<sup>th</sup>-grade males are proficient in ELA and just 15% in Math. Vertus Middle is designed to meet the needs of all students, including those with disabilities and English Language Learners. The school's personalized, supportive model will ensure every student gets the targeted instruction, mentorship, and wraparound support they need to close gaps, stay engaged, and build a strong foundation for high school and beyond.

**Curriculum and Instructional Features:** Vertus Middle will focus on building a strong foundation in literacy and numeracy, critical areas where many of our students arrive significantly behind grade level. The core academic program will balance rigorous, teacher-led instruction with a blended Learning Lab model that uses adaptive digital tools to reinforce essential skills and give students extra practice at their own pace.

In ELA, Vertus Middle will adopt a top-rated curriculum such as Amplify ELA or an equivalent, rooted in NYSED's Science of Reading principles. Instruction will emphasize structured routines, explicit vocabulary, fluency, and comprehension strategies to build the reading and writing skills that are the foundation for success in all subjects. For math, students will progress through a clear sequence—Math 7, Math 8, and Pre-Algebra—using rigorous, proven curricula like EngageNY/Eureka Math, eMath Instruction, or Illustrative Mathematics. Daily math instruction will ensure students strengthen basic numeracy and problem-solving skills, so they enter high school ready for advanced coursework. Science and social studies will be taught using Edgenuity's standards-aligned, accessible curriculum designed with Universal Design for Learning to reach all learners. The Seminar course, led by Preceptors, will weave in character education, early career exposure through Project Lead the Way, and practical life skills—reinforcing literacy and numeracy across real-world contexts and preparing students for high school and beyond.

**Leadership and Management Design:** The current Vertus Charter Board of Trustees will continue to govern Vertus Middle, maintaining policies and oversight to ensure academic and organizational success. The Board will hold full legal and fiduciary responsibility, delegating daily operations to CEO Julie Locey. As CEO, Locey will oversee the leadership team and key administrators for academics, operations, and finance. The Principal will handle day-to-day operations and ensure the academic program runs smoothly, supported by a Director of Curriculum & Assessment, an Assistant Principal, a Facilities & Athletic Director, and a Specialized Services Coordinator.

**Other Relevant Information:** Last year in Rochester, demand for middle school charter seats far exceeded supply: over 600 students applied for just 200 available 7<sup>th</sup>-grade seats, and more than 400 students competed for only 80 seats in 8<sup>th</sup> grade. Vertus Middle is designed to help close this gap at the critical stage when many students begin to fall behind.

## CERTIFICATION AND ASSURANCES STATEMENT

Proposed Charter School Name:	Vertus Charter Middle School
Proposed School Locations (District):	Rochester City School District
Name of Exiting Ed. Corporation (If applicable):	

I hereby certify that the applicant group/prospective Board of Trustees have all read Article 56 of the New York State Education Law, and understand the relationship between a charter school and the authorized chartering entity as defined in that statute. By submitting a charter school application to the Board of Regents, the applicant group/prospective Board of Trustees understands that the Board of Regents is the authorized chartering entity with the authority to approve our application to establish the proposed charter school and enter into a charter agreement setting forth the terms and conditions under which the Board of Trustees will operate the charter school. The applicant group/prospective Board of Trustees also understands that this charter school application serves as the first component of an application for a federal Charter Schools Program (CSP) Planning and Implementation Grant. We understand that if the charter application is approved and a charter is issued by the Board of Regents, the school is qualified to receive a CSP grant, pending available funding and final approval of additional materials – including budget materials - by NYSED and by the New York State Office of the Comptroller. We agree to complete all required budget information and assurances according to forthcoming instructions and a revised timeframe to be issued by NYSED.

I hereby certify that the information submitted in this application is true to the best of my knowledge and belief; and further I understand that, if awarded a charter, the proposed school shall be open to all students on a space available basis, and shall not discriminate or limit the admission of any student on any unlawful basis, including on the basis of ethnicity, race, creed, national origin or ancestry, gender, sexual orientation, disability, intellectual ability, measures of achievement or aptitude, athletic ability, age, religion, proficiency in the English language or a foreign language, or academic achievement. I understand that the Charter Schools Act allows, to the extent consistent with Federal law, "the establishment of a single-sex charter school or a charter school designed to provide expanded learning opportunities for students at-risk of academic failure or students with disabilities and English language learners."<sup>1</sup>

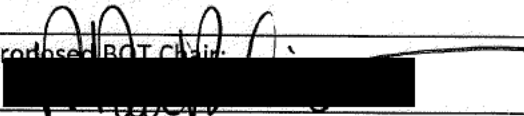
The applicant group also makes the following assurances pursuant to Section 7221b of the United States Code (USC), which will be incorporated into, and made a part of, the Charter School's charter, if granted, and be binding on the Charter School itself:

- An assurance that the charter school will annually provide the Secretary of the U.S. Department of Education and the State Education Department such information as may be required to determine if the charter school is making satisfactory progress toward achieving the objectives described in this application;<sup>2</sup>

<sup>1</sup> N.Y. Education Law § 2854(2)(a)

<sup>2</sup> 20 USC § 7221b(b)(3)(I)

- An assurance that the charter school will cooperate with the Secretary of the U.S. Department of Education and the State Education Department in evaluating the program assisted;<sup>3</sup> and
- That the charter school will provide such other information and assurances as the Secretary of the U.S. Department of Education and the State Education Department may require.<sup>4</sup>
- That the school will follow any additional procedures required by NYSED to ensure an orderly closure and dissolution process, including compliance with the applicable requirements of Education Law §§2854(2)(t), 219 and 220 and any Closing Procedures specified by NYSED.

I, <u>Enter name of Proposed Board Chair</u> , hereby certify that the information submitted in this Full Application to establish <u>Enter Name of Proposed Charter School</u> is true to the best of my knowledge and belief, realizing that any misrepresentation could result in disqualification from the application process or revocation after issuance of the charter.	
Signature of Proposed BCT Chair:	
Date:	7/2/2025

<sup>3</sup> 20 USC § 7221b (b)(3)(K)

<sup>4</sup> 20 USC § 7221b (b)(3)(N)



# Vertus

## MIDDLE SCHOOL

**A Charter School Application Submitted to the  
New York State Education Department Board of Regents  
July 5, 2025**

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## I. MISSION, KEY DESIGN ELEMENTS, ENROLLMENT, AND COMMUNITY

### A. **Mission Statement, Objectives, and Goals**

**Mission:** Vertus Charter Middle School’s mission is to prepare leaders of character for the community and the workplace.

**Furthering the Objectives of the New York Charter Schools Act:** Vertus Charter Middle School (Vertus Middle) will further multiple objectives of the New York Charter Schools Act by improving student achievement, expanding educational options, and serving high-need populations—particularly disengaged males in grades 7–8.

**Improving student learning and achievement:** In the district of location, Rochester Community School District (RCSD), only 12% of male seventh graders and 18% of male eighth graders demonstrate proficiency in ELA; and 15% of seventh graders and 15% of eighth grade males demonstrate proficiency in Math. With approximately 1,516 male students across seventh and eighth grade in RCSD, this means an estimated 1,288 boys are not proficient in ELA, and approximately 1,288 are not proficient in Math. These numbers reflect an urgent need for new approaches.

Vertus Middle will address these achievement gaps with personalized, competency-based instruction, targeted supports, and trauma-informed practices. The school will offer personalized, year-round academics, with a 200-day school year and customized learning plans that adapt to each student’s unique needs, ensuring they remain on track for high school success. As a single-gender school, it will provide a focused environment proven to boost outcomes for at-risk boys—especially Black and Latino students—by reducing distractions, increasing engagement, and offering strong male role models.<sup>1</sup>

**Increasing learning opportunities for students at risk of academic failure:** Vertus Middle will build on its successful high school model for over-age, under-credited youth by reaching students earlier—in the middle grades, before dropout risk intensifies. With 95% of students from Rochester and 86% economically disadvantaged, Vertus Middle will offer structured, responsive support to those most underserved by the traditional system.

**Encouraging innovative teaching methods:** Vertus Middle will integrate digital platforms, restorative practices, and a middle school CTE program that builds soft skills, problem-solving, and career awareness, offering hands-on learning not typically available in urban middle schools.

**Providing parents and students with expanded educational choices:** In a district where outcomes for boys are persistently low, Vertus Middle will offer a much-needed alternative. For years, families have asked Vertus to serve middle grades, seeking earlier access to the school’s proven model of structure, support, and success. Vertus Middle is a direct response to that demand—extending the high school’s strong academic foundation, mentorship, and character development to younger students. By creating a clear pathway from middle to high school, the school will give families a consistent, community-rooted, and high-quality option designed to meet the needs of their sons from the start. It will extend a proven high school model to younger

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<sup>1</sup> Bracey, 2006; Mael et al., 2005; Hughes, 2009

students, giving families access to a tailored, community-based program designed for their children's success.

**Establishing new professional opportunities for educators:** Vertus Middle teachers and Preceptors will join a mission-driven, team-based culture focused on individualized instruction, trauma-informed care, and continuous professional development—creating a strong pipeline of educators committed to serving high-need students.

**Providing schools with a method to hold themselves accountable for results:** Vertus Middle will be measured against clear performance goals in academic growth, behavior, attendance, and high school readiness—ensuring alignment with the priorities of the Charter Schools Act and the school's charter.

**Mission-Specific Goals and Rigor:** Vertus Middle will measure success through rigorous, mission-aligned goals focused on academic outcomes, student engagement, and long-term readiness. These goals reflect the school's commitment to closing performance gaps, reducing risk factors, and preparing students for future success:

**Academic Goals- To prepare leaders of character with strong academic foundations to thrive in high school and beyond:**

- *ELA and Math Proficiency:* Each year, Vertus Middle students will demonstrate growth exceeding one year's expected progress, as measured by i-Ready or a similar nationally normed assessment, with a goal of at least 60% of students meeting growth targets annually.
- *Benchmark 1:* Vertus Middle will meet or exceed achievement indicators for academic proficiency, and trends toward proficiency, of similar schools. Proficiency shall be defined as achieving a performance level of 3 or higher on Grade 7-8 state assessments in ELA, math, and science.

**Engagement and Behavior Goals- To prepare leaders of character through strong habits and consistent engagement:**

- *Chronic Absenteeism:* The school will reduce chronic absenteeism to below 30%, outperforming the RCSD average.
- *Suspension Rates:* Suspension rates will remain below 5%, through implementation of restorative practices and proactive behavioral support systems.
- *Student Retention:* Annual student retention will exceed 85%, indicating sustained family satisfaction and student engagement.

**Operational and Programmatic Goals- To prepare leaders of character through meaningful, hands-on, and future-focused opportunities:**

- *Career Exploration Participation:* 100% of students will participate in at least one hands-on, project-based career exploration experience each semester, fostering real-world problem-solving and responsibility.
- *Stakeholder Satisfaction:* Annual surveys will reflect that at least 80% of students and families agree that the school provides a safe and supportive environment that builds academic confidence and character.
- *Fiscal Health:* The school will maintain a balanced budget annually, with clean independent audits and appropriate reserves.



## B. KEY DESIGN ELEMENTS

**Key Design Elements:** At Vertus Middle, we believe that excellence results from an aligned system that includes mission, school design elements (our Four Pillars), long-term goals, annual goals, and consistent monitoring. Vertus Middle will adapt the four key design elements/pillars of Vertus Charter School's (Vertus High) model to ensure that middle-grade students (grades 7 and 8) are prepared for a seamless transition into high school and beyond. Our model includes programming that is tailored to meet the needs of each student, with a specific focus on personalized, hands-on education that supports both academic and character development.

- **Strong relationships:** Each student will belong to a small learning team of 16–20 students, fostering individual attention and a sense of belonging. Each student will be assigned a Preceptor (a guide, mentor, and role model) who accompanies them to the Learning Labs. With a 6:1 student-to-staff ratio, all staff will share a commitment to building strong relationships with our students, leveraging empathetic listening (as taught by Lives in the Balance) to understand our students' frustrations, anger, and concerns to engage them in shared problem solving and to provide active and sustained support for our students, day and night, throughout each student's time at Vertus Middle.
- **Personalized year-round academics:** Vertus Middle is committed to providing each student with personalized year-round academics in an environment that allows them to create a new future. The Vertus Middle school year will include 200 days of instruction. Each student will have a customized learning plan that adapts to their unique needs, ensuring they stay on track for high school success.
- **Character education:** We will equip our students with an understanding of what successful men do to succeed through ongoing character curriculum seminars and community service projects throughout the year. They will be supported in building our three virtues of courage, leadership, and responsibility, and grow in self-awareness through focused conversations with an assigned Preceptor. We will build character strengths: grit, social intelligence, self-control, curiosity, optimism, gratitude, and zest.
- **Career preparation:** As part of the Vertus Middle commitment to career readiness, middle school students will begin exploring potential career pathways and the skills required to succeed. While academic preparation will remain the primary focus, students will engage in career exploration activities to help them understand the connection between education and future professional opportunities.

**Serving Diverse Needs of All Students:** Each design element is structured to serve all learners, including students with Individualized Education Programs (IEPs) and English language learners (ELLs). Personalized plans and small-group instruction will ensure accommodations and scaffolds are built into daily instruction, while Preceptors will provide ongoing support and relationship-based engagement. More specifically, **Strong Relationships Through Learning Teams and Preceptors**, will improve engagement for students of color, those in poverty, and students with emotional or behavioral needs by fostering a sense of belonging, consistency, and individualized care. **Personalized, Year-Round Academics** will support students with IEPs, ELLs, and those who enter below grade level by providing extended time, scaffolding, and tailored supports that close achievement gaps without stigma. **Character Education Rooted in Daily Practice** will equip

students with tools for navigating social challenges, managing stress, and building positive peer relationships, particularly beneficial for students experiencing adversity or trauma. **Career Preparation and Early Exploration** will help students from low-income families or first-generation college backgrounds envision postsecondary success, while promoting equity in access to high-skill, high-wage opportunities.

**Rationale for Key Design Elements and Supporting Evidence:** The design of Vertus Middle draws on the successful, research-based practices of Vertus High, tailored to meet the academic and social-emotional needs of disengaged young men in Rochester. Each core element reflects proven strategies for re-engaging students who have struggled in traditional settings.

- **Strong Relationships through Learning Teams and Preceptors:** Each student will join a stable learning team (16–20 students) and be paired with a Preceptor—a daily mentor and role model. This 6:1 student-to-staff ratio supports deep, individualized relationships. Preceptors will be trained in the Lives in the Balance model, which emphasizes empathy and collaborative problem-solving to reduce disciplinary issues and build trust. Research confirms that strong adult-student relationships are key to engagement and academic success, especially for high-need students.<sup>2</sup>
- **Personalized, Year-Round Academics:** Students will receive 200 days of instruction annually, guided by personalized learning plans that reflect their academic level and growth goals. This extended, tailored approach will accelerate progress and close gaps. RAND and other research validate personalized learning as an effective strategy for underserved students. Year-round learning also counters summer learning loss, which disproportionately affects low-income youth.<sup>3</sup> Studies show that students in year-round programs often outperform peers and report higher satisfaction.<sup>4</sup> Two meta-analyses of studies on year-round schooling concluded that: students in year-round schools do as well or slightly better in terms of academic achievement than students in traditional schools; year-round education may be particularly beneficial for students from low-income families; and students, parents, and teachers who participate in a year-round school tend to have positive attitudes about the experience.<sup>5</sup>
- **Daily Character Education:** Character development will be embedded in daily routines through seminars, coaching, and service-learning projects. Students will focus on three core virtues: courage, leadership, and responsibility—building non-cognitive skills like grit and social intelligence, which are essential for long-term success.<sup>6</sup> This model aligns with CASEL’s SEL framework and supports students in self-regulation, goal setting, and relationship-building.
- **Career Exploration and Readiness:** Recognizing middle school as a critical stage for identity development, Vertus Middle will introduce age-appropriate career exploration activities that build awareness, soft skills, and motivation. Research from MDRC (formerly the Manpower Demonstrate Research Corporation) and others shows that early exposure to career

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<sup>2</sup> Osher et al., 2018

<sup>3</sup> McCombs et al., 2011

<sup>4</sup> Worthen & Zsiray, 1994; Cooper et al., 2003

<sup>5</sup> Worthen and Zsiray, 1994; Cooper, Valentine, Charlton, and Melson, 2003

<sup>6</sup> Duckworth et al., 2007

pathways increases engagement and academic persistence, particularly for at-risk youth. These experiences lay the foundation for CTE programming in high school.

**Certification Exam Waiver (Regents Amendment to §80, Feb 2025):** Vertus Middle seeks to utilize this waiver, which allows teacher candidates who score within 0.5 Standard Error for Measurement (SEM) of the passing score on the NYSTCE and hold a **3.5 GPA** (or higher) to bypass retaking the test and receive certification directly. This waiver will help us widen the talent pool without compromising quality. Standardized assessments are valuable; however, they are not the only way to show excellence. It also creates a faster path to certification, ensuring that students benefit from teachers who may otherwise be delayed by test performance.

### **C. STUDENTS AND EDUCATIONAL MILIEU**

**Educational Options:** Rochester families have access to a range of middle-grade educational options, yet academic outcomes, particularly for boys, remain persistently below state expectations. Vertus Middle’s district of location, Rochester City School District (RCSD), which has faced state and federal accountability designations for more than two decades and has been designated a *Target District* under New York State’s ESSA plan since 2018, currently operates eight middle-grade schools: Andrew Langston Middle School, Dr. Freddie Thomas Middle School, Loretta Johnson Middle School, Thurgood Marshall Middle School, Northwest Junior High (Douglass Campus), East Lower School, School of the Arts, and World of Inquiry School No. 58.

Four of these—Andrew Langston, Dr. Freddie Thomas, Loretta Johnson, and Thurgood Marshall—were recently (2024-25 school year) reconfigured as part of district restructuring efforts. These changes have left many schools without longitudinal data, making it difficult for families to track performance trends or hold schools accountable for improvement. Frequent shifts in grade configurations, leadership, and staffing have only added to the instability, creating an unpredictable learning environment when students most need consistency.

The data<sup>7</sup> that is available paints a stark picture of the academic challenges Rochester boys face. In RCSD, 12% of male 7<sup>th</sup> graders demonstrate proficiency in ELA, 33 percentage points below the state average (45%)—and just 15% are proficient in Math, a gap of 42 points (57% male seventh graders across the state). By 8<sup>th</sup> grade, only 18% of RCSD’s male students meet ELA standards while 47% of eighth grade males across the state do, and 15% meet Math standards, 24 percentage points below statewide (39%) male eighth graders. At East Lower School (a Comprehensive Support and Improvement School), for example, only 9% of male 7<sup>th</sup> graders were proficient in ELA and just 5% in Math; by 8<sup>th</sup> grade, only 6% of boys reached proficiency in Math and 29% in ELA. In math, more than two-thirds of 7<sup>th</sup> graders and nearly three-quarters (71%) of 8<sup>th</sup> graders score at Level 1, the lowest proficiency level on state assessment, indicating significant gaps in knowledge and skills and needs substantial academic support to reach proficiency.

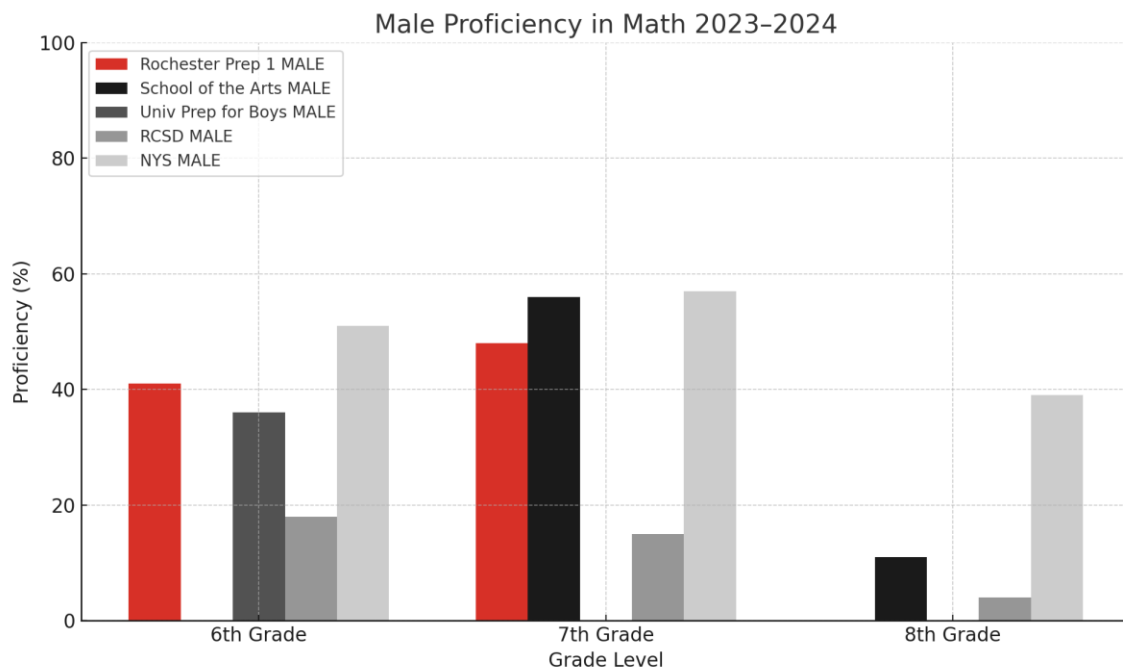
The table below summarizes male proficiency rates in Math across grades, comparing RCSD students with local charter options and the statewide average for boys.

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<sup>7</sup> ROCHESTER CITY SCHOOL DISTRICT - NEW YORK STATE REPORT CARD [2023 - 24]

Male Proficiency 2023-24					
Grade	Rochester Prep 1	School of the Arts	Univ Prep for Boys	RCSD Male	NYS Male
6 <sup>th</sup> Grade	41	n/a	36	18%	51%
7 <sup>th</sup> Grade	48	56	n/a	15%	57%
8 <sup>th</sup> Grade	n/a	11	n/a	4%	39%

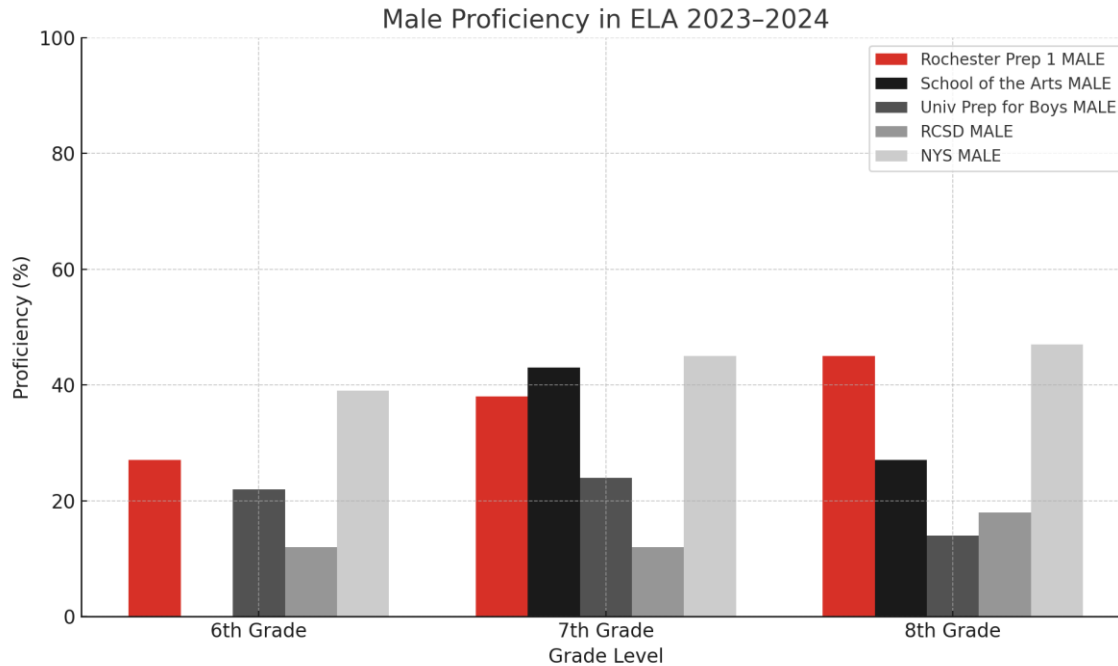
The bar graph below presents a visual of the proficiency gap.



ELA proficiency follows a similar pattern. Data shows that many students are entering middle school with substantial literacy deficits and make only minimal gains by eighth grade. The table below compares male proficiency in Rochester (at traditional and charters) to state averages.

Male Proficiency 2023-24					
Grade	Rochester Prep 1 MALE	School of the Arts MALE	Univ Prep for Boys MALE	RCSD MALE	NYS MALE
6 <sup>th</sup> Grade	27%	n/a	22%	12%	39%
7 <sup>th</sup> Grade	38%	43%	24%	12%	45%
8 <sup>th</sup> Grade	45%	27%	14%	18%	47%

The bar graph below presents a visual of the proficiency gap.



These challenges are worsened by factors that push boys even further off track. Nearly 59% of RCSD’s middle-grade students are chronically absent—a pattern closely tied to falling behind academically and dropping out. The district’s suspension rates are among the highest in New York State, disproportionately affecting boys and students of color and resulting in lost instructional time that is rarely regained. The impact is clear: RCSD’s male student dropout rate is 16%, and just over half (58%) of male students graduate on time, evidence that far too many young men disconnect from school well before high school.

Beyond the traditional public schools, Rochester families have access to several middle-grade charter schools, but these options remain limited in reach and academic outcomes.

- University Prep Charter School for Young Men, an all-boys college-preparatory school, reports stronger results than the district average—about 24% of 7<sup>th</sup> graders are proficient in ELA and 14% in Math—but these rates are still far below state standards.
- Rochester Prep Charter School, with multiple campuses, emphasizes structure, discipline, and a strong college-going culture. Its middle-grade proficiency rates are similar to district averages with ~18–22% in ELA and 12–16% in Math.
- The Academy of Health Sciences Charter School serves grades 7–12 with a focus on health sciences pathways, career exploration, and internships. However, student performance remains low, with fewer than 20% proficient in core content areas.
- Eugenio María de Hostos Charter School offers a bilingual, culturally responsive K–12 program designed to serve Rochester’s Hispanic community. Its dual-language model promotes biliteracy and cultural identity. Middle-grade proficiency rates match district outcomes.
- Rochester Academy Charter School operates as a K–12 with small class sizes and a college-focused environment; however, academic results at the middle level are comparable to the district’s low averages.

The RCSD's magnet program, School of the Arts, reports stronger performance (e.g., 49% 7<sup>th</sup> grade Math proficiency) but accepts a limited number of students with a competitive admission process. Private schools such as Harley School (average tuition ~\$23,000) and Allendale Columbia (\$30,680) offer additional options but are financially prohibitive for our target families.

Existing options indicate Rochester's current middle-grade options are not meeting the needs of boys who require consistent relationships, personalized learning, and targeted intervention to gain readiness for high school success.

**Target Student Population:** Vertus Middle is designed to serve Rochester's young men who are most at risk of falling behind and disengaging in the critical middle grades. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues and chronic absenteeism, and students who have struggled to succeed in traditional school settings. The expected student population will closely reflect the demographics of Vertus High. Approximately 95% of students will live within the city of Rochester, with more than 85% qualifying as economically disadvantaged. Many will come from households facing additional challenges such as housing instability, food insecurity, exposure to violence, or involvement with the juvenile justice system; factors that often lead them off track academically.

Vertus Middle also anticipates serving students with disabilities (approximately 25%) and ELLs (approximately 12%). These rates are comparable with enrollment trends at Vertus High. Compared to RCSD's overall enrollment (22% for students with disabilities and 16% for ELLs), Vertus Middle's projected special education rate is slightly higher, while its ELL rate is slightly lower. This is expected, as RCSD's data includes the broader, co-educational K-12 population, whereby Vertus High has found that many ELL students no longer qualify as ELLs by the time they reach high school. For Vertus Middle, this means the proposed school will likely serve a slightly higher proportion of ELL students than the high school but still below the district average given that ELL identification is more common in younger elementary grades. Our staffing plan ensures that all students, including students with specialized needs, will receive the same high level of personalized support, structure, and strong adult relationships as their peers.

Our target population aligns with the priority school design criteria in the RFP: the proposed model prioritizes early CTE exposure and serves a student population where at least two-thirds are on track to become over-age and under-credited. The need is urgent: male students in RCSD face exceptionally low proficiency rates and are at high risk of academic failure. Chronic absenteeism, frequent suspensions, and other systemic barriers worsen these outcomes. Vertus Middle will disrupt this trajectory by providing a proactive, supportive environment that builds a strong foundation for success in high school and beyond.

**Educational Needs:** Rochester, New York, faces persistent educational challenges and an urgent need for high-quality, research-driven school models that can disrupt cycles of generational poverty and underachievement for its most vulnerable youth. Although Rochester is the state's third largest city and anchors its second largest regional economy, decades of population decline, economic disinvestment, and concentrated poverty have left deep marks on its families and neighborhoods. The city's median household income (\$46,628) remains less than half the New York State average (82,095), with nearly a quarter (26.6%) of residents living below the poverty line.



Rochester is also one of New York’s most diverse urban centers: about 38% of residents are Black or African American, 41.5% are White (non-Hispanic), nearly 20% are Hispanic or Latino, and about 4% are Asian.<sup>8</sup> In the neighborhoods Vertus Middle will serve, families face daily challenges such as housing and food insecurity, community violence, and exposure to trauma—conditions that directly undermine students’ readiness to learn and thrive.

These barriers are reflected in local schools. As described in the preceding section, middle school students in the RCSD continue to perform far below state standards, with many boys of color disproportionately affected by low proficiency rates, high suspension and absenteeism rates, and the risk of becoming off-track and under-credited before high school.

While the district has closed some of the gap—rising from under 50% a decade ago to over 70% today—it still lags 10–15 percentage points behind the statewide rate. This persistent gap underscores the urgent need for high-quality, research-driven school models that can address the root causes of low completion rates, including chronic absenteeism, academic underperformance, and other systemic barriers.

These educational challenges are intensified by significant health risks and environmental factors. Rochester’s aging housing stock, limited reinvestment, and persistent neighborhood disinvestment contribute to high rates of childhood lead exposure and asthma, both of which affect attendance and learning. Many families lack access to consistent health care and reliable supports to address these challenges. Generational barriers, including low levels of adult educational attainment, further reinforce cycles of limited mobility and narrow pathways to success.

Yet even with these persistent challenges, Rochester is home to powerful cultural, educational, and economic resources. Renowned institutions such as the University of Rochester, Rochester Institute of Technology, the Eastman School of Music, and a strong network of museums, theaters, and industry partners present opportunities for students that too often remain out of reach for young people growing up in high-poverty neighborhoods.

Vertus Middle is designed to respond directly to the urgent call to serve Rochester’s 7<sup>th</sup> and 8<sup>th</sup> graders, particularly young men at greatest risk of academic failure. By providing a structured, year-round learning environment anchored in strong mentorship, personalized support, early academic intervention, and meaningful family engagement, the school will offer a clear, research-based alternative for young men most at risk of academic failure. Vertus Middle will connect students to local cultural institutions, career opportunities, and college pathways—helping them see new possibilities for their futures. This intentional approach will ensure that Rochester’s young men, including ELLs and students with disabilities, have access to a high-quality education that supports both their immediate academic growth and long-term success. In doing so, Vertus Middle will help expand opportunity, strengthen neighborhoods, and contribute to Rochester’s vision of educational equity for all students.

Rochester urgently needs a high-quality middle school intentionally designed to disrupt patterns of academic failure among boys—before those gaps become too wide to close. The middle grades are a critical inflection point when students either build momentum toward high school success

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<sup>8</sup> Census.gov Quick Facts: Rochester city, New York

or begin to disengage entirely. For too many boys in the RCSD, this downward trajectory starts long before high school, with low proficiency rates, chronic absenteeism, and increasing risk of becoming off-track and under-credited.

Despite this urgent need, Rochester offers few inclusive, structured, and supportive school options that meet the complex academic and social-emotional needs of middle-grade boys. Too often, district middle schools lack the targeted interventions and wraparound supports needed to help students overcome the barriers created by poverty, instability, and trauma.

Vertus Middle is being proposed to fill this gap at the point when it matters most. The new school will extend the proven success of Vertus High—a grades 9-12 program designed specifically for young men who are over-age and under-credited. Vertus High has shown that when students are provided with structure, daily mentoring, personalized instruction, and mastery-based progression, they can re-engage and excel—even after years of educational disruption.

By starting this work earlier, Vertus Middle will reach students in grades 7 and 8, when there is still time to accelerate learning and change their academic trajectory before high school. The school will offer a year-round, relationship-driven, trauma-informed environment designed for boys who face daily barriers such as poverty, food insecurity, and exposure to trauma. Through consistent mentoring, integrated social-emotional learning, and personalized academic support, Vertus Middle will provide Rochester's young men with the structure and encouragement they need to rebuild confidence, strengthen core skills, and step into high school ready to succeed. In doing so, Vertus Middle will ensure that more boys from Rochester's most challenged neighborhoods not only recover academically but thrive—graduating on time and prepared to contribute to their families, communities, and city.

**Rationale:** By locating the new school in Rochester, the applicant team aims to reach young men who are most at risk of falling behind during the critical middle-grade years while building on a foundation of strong relationships, personalized learning, and deep community trust. Vertus Middle will serve as a direct feeder to Vertus High. Vertus High has a proven record of helping young men who have struggled to succeed in traditional schools—students who may be over-age, under-credited, or have previously dropped out. Its program is designed to meet each student's unique needs through personalized instruction, caring adult relationships, and comprehensive social-emotional support, recognizing that every student's path to graduation looks different. Extending this proven model to the middle grades means reaching students sooner (i.e., before they fall too far behind) while offering them the supportive relationships and clear structure that Vertus High is known for. As evidenced by the NYSED renewal report, Vertus High students consistently meet or exceed state and district averages on key academic assessment.

The applicant group is deeply connected to the Rochester community and trusted by local families, community leaders, and partners. The addition of Vertus Middle will strengthen these ties, ensuring more young men receive the academic, social, and emotional support they need to overcome barriers and reach their full potential. The success of Vertus High shows what is possible when young men have a safe, supportive, and personalized environment—and Vertus Middle will build on that success to change outcomes even earlier.



**Enhancing Educational Options:** Vertus Middle will fill a critical gap in Rochester’s educational landscape by offering an option that does not currently exist: a middle school intentionally designed to meet the needs of boys who are academically at risk and underserved in traditional settings. Unlike traditional district models, the school will operate on a year-round calendar, use mastery-based progression to close skill gaps, and deliver daily mentoring through its Preceptor model. This structure will ensure students have the consistency, guidance, and accountability needed to remain engaged and achieve sustained academic growth before entering high school.

In addition, Vertus Middle will expand local educational options by introducing early exposure to Career and Technical Education (CTE) in grades 7 and 8—an opportunity rarely available in the middle grades. Through project-based learning, career exploration, and foundational skill development, students will begin connecting classroom learning with real-world pathways, strengthening motivation and readiness for future opportunities.

Vertus Middle will offer a distinct alternative to existing charter schools such as University Prep and Rochester Prep through an approach that blends high expectations and academic rigor with a trauma-informed, mentorship-driven culture centered on relationships, character development, and long-term student wellbeing. Rather than replicating what already exists, Vertus Middle will strengthen the city’s educational ecosystem by serving students who might otherwise fall through the cracks.

**Community Support:** Please see *F. Enrollment, Recruitment, and Retention* for detailed information about the community support we have gathered. In summary, 11 individuals from local organizations and leaders within our community have submitted letters of support for Vertus Middle, affirming the need for a high-quality, single-gender school. More than 325 parents and community members have expressed strong support for Vertus Middle through surveys administered since 2021. There is no known opposition for our school.

**Engaging Students Who Meet the Criteria of the Priority School Design:** As described in *F. Enrollment, Recruitment, and Retention*, Vertus Middle will implement significant efforts to engage with, enroll, and retain students who meet the described priority school design of early exposure to Career and Technical Education and serving a student population in which at least two-thirds are on track to become over-age and under-credited. Our model focuses on serving at-risk young men, and our practices and policies, including recruitment and enrollment, are structured to engage this demographic.

**Connections:** RCSD has experienced leadership transitions- from the Superintendent to Cabinet members and mid-level district leaders, which has delayed our ability to communicate and coordinate effectively. With many new employees starting their role on July 1, it has been challenging to establish consistent points of contact. As a result, efforts to communicate, collaborate, and share information with the district are now scheduled to start later this summer. Our CEO will serve as the primary contact for our collaboration efforts with the district.

#### **D. APPLICANT GROUP HISTORY AND CAPACITY**

**Applicant Group:** The applicant group consists of the Chief Executive Officer (CEO), Julie Locey, and the 11 members of the existing Vertus High Board of Trustees. Following is a brief description of each member, with full resumes/bios found in *Attachment 5a*.

- **Spencer Ash:** Current Board member trustee at Vertus High; experienced attorney with over 20 years of legal experience; currently a Municipal Attorney in the Law Department for the City of Rochester.
- **Allison Bell:** Current Board member trustee at Vertus High; seasoned financial professional with extensive experience in client relationship management, financial planning, investment analysis, and operational support for high-net-worth and ultra-high-net-worth clients.
- **Sylvia David-West:** Current Board member trustee at Vertus High; over 15 years of technical and manufacturing experience; manages and coordinates cross-functional teams; active member of various professional and diversity organizations; strong commitment to leadership, development, and fostering a culture of continuous improvement.
- **Evan Gallina:** Current Board secretary and trustee at Vertus High; Partner at Gallina Development Corp; has been involved in the Commercial/Industrial Real Estate market for over 9 years and brings facilities management and real estate expertise to the Board. Evan is vested in Rochester as a marketplace, a community, and a home.
- **Dr. Calvin J. Gantt:** Current Board member trustee at Vertus High; educator; VP for Diversity, Equity, and Belonging and Executive Director for the Downtown Campus at Monroe Community College; serves as member of the President's Cabinet; brings experienced and collaborative leadership as well as a strategic vision to the College; oversees specific functional areas; and oversees the services and operations of the Downtown Campus.
- **Dekedrian Johnson:** Current Board member trustee at Vertus High; 6-year background in information security, IT audit and risk management in the financial service, banking, telecommunication, manufacturing, and technology industries.
- **Julie Locey:** Current CEO at Vertus High for past nearly 4 years; educator; at Vertus 9 years total; experienced leader with proven track record.
- **Michael Mandina:** Current Board member trustee at Vertus High; co-founder and chairman of Optimax Systems, Inc. a manufacturer of precision lenses and optical components; the founder of the Finger Lakes Advanced Manufacturing Enterprise, an organization of companies whose purpose is to help schools to prepare students for careers in advanced manufacturing and for companies to identify and hire them; active on the local and national level in promoting job training.
- **John (Jack) O'Connell:** Current Board member trustee and treasurer at Vertus High; MBA with a specialization in finance; advises on and negotiates contracts for Google.
- **David A. Paul, MD:** Current Board member trustee at Vertus High; higher education Board experience; background in leadership and healthcare; chairs the Fundraising & Community Engagement Committee for Vertus High.
- **Victoria Van Voorhis:** Current Board president and trustee at Vertus High; Founder & CEO of Second Avenue Learning (recently acquired by ZSpace, Inc.); brings more than 17 years of Ed-Tech experience to her organization, Second Avenue, and brings valuable leadership expertise to the current Board of Vertus High.
- **Jeff Wynn:** Current Board member trustee at Vertus High; a seasoned professional with a diverse background in real estate, pharmaceuticals, Infectious Diseases & Vaccines, pharmaceutical sales, and community leadership.

**Applicant Group Formation:** The applicant group, consisting of Vertus High's current Board of trustees, has established relationships and a deep commitment to the community. It is because of our strong commitment to this community that we are submitting this charter application to expand our reach and serve young men at an even earlier age. By expanding our model into a middle school, we will reach students at a critical stage, before academic gaps widen and disengagement takes hold. With six years of Vertus support instead of four, we can build deeper relationships, provide sustained support, and unlock levels of growth that are not possible within the current high school-only model. The school design and application are modeled after the successful high school; however, some elements (described in *E. Public Outreach*) have been adjusted to meet the needs of middle school students and in direct response to the input gathered. Recurring themes in focus groups and input sessions have included the need for extended time on literacy and numeracy, emphasis on character development, and the significance of effective male role models.

Please see section *E. Public Outreach* for the extensive community outreach we have done over the last four years to determine the need/demand for a school such as ours and gather community input. Over that time, we have consistently heard the same message from families, community members, and local leaders: “*We wish Vertus could start sooner.*” Parents often reflect on the transformation they have seen in their sons at Vertus High—marveling at their academic growth, discipline, and self-confidence—and wondering how much more could have been achieved if those supports had been in place earlier.

It is because of regular conversations with families, community members, and leaders that we endeavored on this journey to open a middle school. We knew that reaching students earlier would mean more time to close academic gaps, accelerate growth, and deepen the meaningful relationships that are core to our model. Upon receiving a full five-year renewal from NYSED, we recognized that the time had come to answer the call from our community and expand our reach.

To gather both qualitative and quantitative data confirming this need strong, we surveyed families, held community events, hosted focus groups, spoke with leaders within the community, solicited letters of support, among other activities.

**Community Connection:** The applicant group is deeply tied to the Rochester community and has served the community through its relationship with the high school since 2014. Board members/the applicant group have built strong relationships within Rochester, especially with at-risk youth and their families, and the addition of the middle school will further solidify these ties. We are committed to creating a supportive learning environment for young men who face significant barriers to success, ensuring they have the academic, social, and emotional support needed to achieve their educational goals. The success of Vertus High has demonstrated the effectiveness of our approach, and we are excited to deepen our connection to the community while expanding our reach to serve more students and increasing the impact we have on the lives of Rochester’s young men through the creation of Vertus Middle.

**Primary Author:** Julie Locey, the CEO, is the primary author of the application. Rapa Consulting LLC. and DeJoy & Co. were paid consultants in the development, fiscal planning, and writing of the application.

## **E. PUBLIC OUTREACH**

**Public Outreach Participation:** As articulated above, the applicant group, comprised of the existing Vertus High Board and the CEO, has long considered expanding the Vertus model to serve students in 7<sup>th</sup> and 8<sup>th</sup> grade. The direct and persistent feedback from parents, students, and families, sparked and sustained our vision for Vertus Middle. Accordingly, the CEO and staff members at Vertus High have participated in public outreach on behalf of the founding group. The CEO, with the support of the high school principal, has spearheaded public outreach efforts. Together, they have ensured that conversations about the middle school's design, purpose, and timeline were not held in boardrooms alone, but in living rooms, church basements, school events, and community spaces. The CEO has made public outreach a top priority, attending and organizing key events like graduations, open houses, the Aberdeen Fair, and local festivals, making sure that the vision for Vertus Middle was accessible, visible, and responsive to community input.

During the CEO's discussion with the Board over the last several years, the Board has tasked the CEO with demonstrating a need for the middle school and submitting evidence of demand and support. The CEO has on multiple occasions over the last 4 years polled the community, spoken with parents and families, and examined current educational options to ensure creating a middle school would be in the best interest of the staff, families, and students of Vertus High. This information was regularly shared with the Board and discussed prior to requesting that the CEO develop this charter application.

In addition to the CEO and members of her leadership team, the CEO also sought the support of James Daniels, the high school social worker. Mr. Daniels is an individual who is highly connected to the youth in our community and is a Youth Pastor at his church. He hosted a focus group with 11 students aged 13-17 at the Church of Love, his local church, with students to share information about the proposed middle school, seek feedback, and continue garnering support. Results from the focus group are described below.

Although specific individuals have led aspects of the outreach process, all members of the applicant group consistently communicate with community members, leaders, and families about the positive influence Vertus High has had on the young men in our community. The Board is energized by input and eager to extend Vertus' impact by serving middle school students.

**Community Needs Analysis:** To ensure Vertus Middle will truly expand high-quality educational opportunities for Rochester families, we conducted a robust community needs analysis using both quantitative data and authentic community engagement. Our goal was not only to confirm demand, but to understand how current systems are falling short—particularly for young men—and how Vertus Middle can fill this critical gap. We examined academic performance data for RCSD and other local schools; we engaged with parents, families, and the community through community events, surveys, and focus groups to determine, analyze, and document the need that exists within the community.

An analysis of academic data from RCSD and other local schools demonstrate a clear need for a middle school program specifically for young men. A discussion of the current options and academic performance of RCSD is found in *C. Students and Educational Milieu*; however, the key

points are highlighted here. In short, the existing high-quality options for students in RCSD are limited; students consistently perform well-below grade level in both district and charter schools. More specifically, only 12% of RCSD male 7<sup>th</sup> graders are proficient in ELA; this is 33-percentage points below the state average (45%); 15% of male 7<sup>th</sup> graders in RCSD were proficient in math; this is a 42-percentage point gap (57%). 18% of 8<sup>th</sup> grade male students were proficient in ELA compared to 47% of 8<sup>th</sup> grade students across the state; 15% of 8<sup>th</sup> grade male students demonstrated proficiency in math; this is 24 percentage points below the state average. Chronic absenteeism affects nearly 59% of RCSD's middle-grade students, and the suspension rates remain among the highest in New York State.

In the local charter schools, performance also was lagging, and male students were still well below the state averages. This performance, at both RCSD and the charter schools, indicate that young men, in particular, are not being well served. Vertus Middle is eager to provide these students with the opportunity to attend a school with a proven track record of experience and a strong program grounded in strong relationships, personalized year-round academics, character education, and career preparation.

We also engaged with the community and conducted significant public outreach activities as part of our community needs analysis. A description of the activities is described below. Across all forms of outreach, the message was consistent and resounding: families want Vertus to start earlier. They have witnessed the positive impact of Vertus High and believe that middle-grade students deserve access to that same support system before it is too late to close the gap.

**Public Outreach Activities:** Members of the Vertus Board have considered expanding to the middle grades since 2021—an idea inspired not by institutional ambition, but by the voices of stakeholders who asked, time and again, for Vertus to start sooner. To ensure we were responding with thoughtfulness and intention, we carried out a wide-ranging and sustained public outreach campaign over the past several years. Our goal: to gather authentic community input, assess demand, and ensure Vertus Middle would meet a real and urgent need.

On July 1, 2025, we hosted a focus group with 11 middle school and high school aged young men and women to speak with them about their interest in a middle school designed for male youth. We asked questions about the type of school environment that helps them thrive and whether they would be interested in a middle school designed for young men. Many shared they like the idea of projects and careers, online programming, having choice in their learning, and having “cool” programs. They expressed that the location of the school is important, and 5 of the 9 boys in attendance indicated the school would have been a good fit for them, with 2 boys saying maybe. Students also reported that sports offerings are of importance when choosing a school.

We attended several community events to inform the community about the proposed school and seek their feedback. More specifically, we utilized our high school graduation as an opportunity to share information about the middle school and seek input. During the graduation ceremony, we shared the intended location (as articulated in *F. Facilities*, we seek to acquire additional space within the existing Vertus High building to ensure a seamless experience for students and families). We explained that this school, like the high school, would target young men in 7<sup>th</sup> and 8<sup>th</sup> grade who are at-risk of not graduating from high school and who have already displayed signs of disengagement with school. We highlighted our key design elements and what makes the

school unique. Approximately 640 individuals attended the graduation and received information about the proposed middle school.

We posted a flyer (see *Attachment 2b*) in local community centers (The David Gantt R-Center, Trenton and Pamela Jackson R-Center, Willie Walker Lightfoot R-Center, and Carter Street R-Center) to inform the community about our proposed school and included a QR code to provide families and community members with an opportunity to submit feedback on the school design. The survey included a summary of the school, who we intend to serve, and why there is a need for a school such as ours. The survey asked:

- Do you think Vertus has a strong reputation for supporting the academic and character development of young men?
- Would you recommend Vertus to other families based on your current knowledge or experience?
- Have you heard any concerns or criticisms about Vertus that make you question expansion?
- If Vertus added a middle school, would you want to be involved in helping shape its design or programming?

This same graphic was posted on our social media outlets, including Facebook and Instagram on June 21, 2025, and LinkedIn on July 1, 2025, to reach as many followers as possible. **68 individuals** completed the survey with **96% of respondents indicating that Vertus has a strong reputation** for supporting the academic and character development of young men.

We posted public notice for our June 17, 2025, Board meeting, where CEO Julie Locey presented information about the middle school and the feedback/input received thus far. There also was an opportunity for public comment (see *Attachment 2b* for a copy of the Board meeting draft minutes and agenda), reinforcing our commitment to transparency and community input.

We have made it a point to show up in the community—not just talk about it. On June 7, 2025, we attended the Aberdeen Square Fair, shared information and surveyed attendees. All 12 survey respondents indicated there is a need for a school such as ours and shared priorities such as community, discipline, safety, quality of education, leadership guidance, positive role models, a staff that cares, among others. When asked if there “is anything missing from the current Vertus School structure/mission that you would like to see implemented?” one respondent simply relied, “Add a middle school.” The majority indicated nothing and to “keep doing what you’re doing!”

At a March 29, 2025, open house for Vertus families, 30 individuals completed our survey, with 28 individuals denoting that they would support the addition of a middle school to Vertus High in Rochester, NY; and 28 indicating that if Vertus were to open a middle school, they would enroll their child or recommending it to other families.

At the August of 2024 Soul Music Festival, where we hosted an outreach table, **over 150 individuals** signed a petition indicating support for the middle school. While talking to community members, we gathered valuable input on the proposed model. A clear theme in the feedback that we received was that Vertus should expand to serve 7<sup>th</sup> and 8<sup>th</sup> grade.

Additionally, since 2022, we surveyed families to ask the following questions with a total of 87 respondents. The survey had 4 questions listed and asked the following:



- Based on your experience with Vertus High, if Vertus had a middle school, would you enroll your son? **83 of 87 said yes.**
- If you have a younger son, would you send him to Vertus in 7<sup>th</sup> and 8<sup>th</sup> grade? **76 said yes;** 7 indicated they do not have a son in 7<sup>th</sup> or 8<sup>th</sup> grade.
- Do you think Rochester would benefit from a Vertus Middle School? **84 said yes.**
- Do you think your son would have been better prepared for high school if he could have attended 7<sup>th</sup> and 8<sup>th</sup> grade at Vertus? **77 said yes.**

Over the past several years, we welcomed dozens of community leaders into our building to tour and/or attend events as a means of reaching the public and soliciting community input regarding the proposed school. Many of these individuals submitted letters of support for the addition of the middle school. Below is a description; however, their letters can be found in *Attachment 2c*.

- **Danny Wegman**, Chairman of Wegmans Food Markets Inc., submitted a letter in support of our application to open a middle school. Mr. Wegman stated that, “at Wegman’s, a family-founded organization dedicated to workforce development in Rochester, we have seen firsthand how a work-scholarship model grounded in mentorship, personalized relationships, and accountability shapes young lives. We believe in the Vertus model and proudly have 35 Vertus students currently working in our stores.” We intend to continue our partnership with Wegmans for the middle school.
- We received a letter of support from **Mr. Marvald**, a committed supporter of Vertus High. As an educational philanthropist, Mr. Marvald has been a part of Vertus since the beginning, supporting the school with donations such as half of a new school bus and setting up an emergency fund to help students with dire needs. Mr. Marvald “strongly support[s] the expansion” of Vertus to the middle grades. Mr. Marvald was formerly an attorney for Dutch Summers.
- Vertus leadership acquired a letter of support from **Ty Kelley**, the Director of the Work-Scholarship Program at Wegmans Food Markest, Inc. Mr. Wegman was once a Board member of Vertus High. He documented his support for and interest in adding a middle school program to continue expanding Vertus High’s impact on younger aged students.
- **Michael Mandina**, the Chairman and Corporate Fellow of Optimax Systems, Inc., submitted a letter of support for Vertus to expand its model and open a junior high school. Mr. Mandina is a longstanding advocate for educational innovation and equity in Rochester and “has witnessed firsthand the powerful and positive impact Vertus has made on the lives of its students and broader community.”
- Vertus leaders met with **Robert J. Duffy**, the President and CEO of the Greater Rochester Chamber. Mr. Duffy submitted a letter expressing his support for Vertus to secure ownership of the building they currently occupy and expand the model to serve students in junior high. He notes that “deepening their reach will only strengthen the school’s already considerable contribution to Rochester’s long-term economic and social health.”
- **Bryan Hickman**, Vice President of Edceptional, Inc., submitted a letter of support for Vertus Middle. Mr. Hickman described the challenges that Vertus High faces when students enter

9th grade far below grade level and how adding a middle school would help bring students up to grade level earlier. He also described the limited space available in local charter schools for families seeking additional options. Mr. Hickman noted that his organization runs GoodSchoolsRoc.org, and the data presented on this page indicates a need; he noted that “Vertus should have no trouble filling the seats of the junior high.”

- Vertus leadership met with **Dr. Shaun Nelms, EdD, Vice President of the** University of Rochester. Dr. Nelms submitted a letter of support for expanding Vertus High’s program to the middle grades. He highlighted the school’s hallmark innovative character curriculum. He noted the consistent recognition of character growth that the young men receive and how it encourages students to strive for their best.
- We obtained a letter of support from **Ken Lee**, the Urban District Operations Director for the YMCA of Rochester. Mr. Lee toured Vertus High, and we shared with him the Board’s desire to open a middle school and serve more students. Mr. Lee submitted a letter of support on behalf of the proposed middle school and spoke to the need to provide more students with a supportive environment earlier in their educational years. He noted that the addition of the middle school would be a natural progression and would allow a school like Vertus to increase our ability to serve, save, and inspire teens in the Rochester area.
- **Mr. Mahoney**, the Executive Director of Boys & Girls Clubs of Rochester, submitted a letter of support expressing the need for expanding Vertus High to the middle grades. Mr. Mahoney explained that some Vertus students are Club members and leaders within the Club. He noted that the mission of his organization and Vertus are similar in that they work to ensure students/members are academically prepared to continue to higher education and promote personal growth in an environment of caring professionals.
- **State Troopers:** Three State Troopers from the New York State Police Recruitment Unit (Nicole Drew, Diane Caraballo, and Jeffrey Gmerek) attended a Vertus High event where the staff and students participated in an interactive push up competition. After interacting with the students and staff, the Troopers saw the positive impact the school was having on the students. They submitted a letter of support for expanding to the middle grades and noted that our “desire to reach the youth at an earlier age is commendable. Any early positive impact, especially academically, would greatly impact the development of a youth’s future and assets.”
- Rochester Police Department Recruiter: **Ms. Calderon** toured the school on multiple occasions after being invited to tour the school and meet students. She noted the pride the school has in the young men, and the way the school seeks to instill in students the importance of education, as well as other career opportunities (such as military or law enforcement). Ms. Calderon submitted a letter of support indicating that she believes reaching young men early is so crucial in their development.

As articulated above, Vertus Middle has conducted significant public outreach efforts to inform the community, seek their input, and ensure that the proposed middle school would be a viable solution for the families and students in Rochester. Stakeholders overwhelmingly support the addition of Vertus Middle to serve more students and begin transforming their lives at an earlier



age. Our thorough community needs analysis indicates that the current performance of the existing school options is not adequately preparing our young men for future success in academics or their careers. Families, community members, and leaders also demonstrated significant support for adding the middle school.

**Public Input:** Over the past several years, the public feedback we have received has been in support of our existing program, though respondents have consistently requested that Vertus High consider adding a middle grades program. The feedback received has been that this program is needed earlier than high school to impact students' trajectories while at such a critical stage for identity development. This application is a direct result of the notable public input we have received. Additionally, students have, over the years, expressed a desire to spend more time in teacher-led classrooms as opposed to instruction via Edgenuity. Accordingly, we have designed the middle school to include more time with teachers and less time in the Learning Labs.

**Proposed District of Location Interaction:** RCSD has seen changes in personnel from the Superintendent to the Cabinet to mid-level district leaders, with new employees starting on July 1. Accordingly, efforts to interact with the district will begin later this summer. Currently, the district does not provide any male only middle school options focused on serving at-risk youth; thus, Vertus Middle would expand the current offerings available for Rochester families and students.

#### **F. ENROLLMENT, RECRUITMENT, AND RETENTION**

Projected Enrollment Table Over the Charter Term						
Grades	Ages	2027-2028	2028-2029	2029-2030	2030-2031	2031-2032
7 <sup>th</sup>	12-13	95	95	95	95	95
8 <sup>th</sup>	13-14		95	95	95	95
Ungraded						
<b>Totals</b>		<b>95</b>	<b>190</b>	<b>190</b>	<b>190</b>	<b>190</b>

**Rationale:** Vertus Middle proposes opening with 95 students in grade 7. In Year 2, the seventh graders will matriculate to grade 8 while a new cohort of seventh graders will join the school for a total of 190 students in grades 7 and 8. The school will maintain an enrollment of 190 students from year two on. Ninety-five students per grade will balance the benefits of a small school with adequate revenue for the robust staff and technology required to implement our model. This size was chosen to accommodate up to 12 small learning teams of 16-20 students, each supported by a dedicated Preceptor. Given that the target population is students who have not been successful in the traditional learning environment and are at-risk of chronic absenteeism, not graduating high school, and low academic performance, some attrition is expected and so the school will annually fill empty seats until the end of the third quarter.

As described in *C. Students and Educational Milieu*, RCSD currently operates eight schools that serve students in the middle grades. Five of these schools are grades 7 and 8 only (Andrew Langston Middle School, Dr. Freddie Thomas Middle School, Loretta Johnson Middle School, Thurgood Marshall Middle School, and Northwest Junior High (Douglass Campus). East Lower School serves students in grades 6-8, School of the Arts (the magnet school) serves students in 7-12, and World of Inquiry School No. 58 serves students in grades K-12.

The charter schools in Rochester offer various grade level configurations, including a 6-12 building (University Prep Charter School for Young Men), three grade 5-8 campuses (Rochester Prep), a 7-12 building (The Academy of Health Sciences Charter School), and two K-12 schools (Eugenio María de Hostos Charter School and Rochester Academy Charter School). The local private schools Harley school (nurse to grade 12) and Allendale Columbia 18 months to grade 12).

**Student Recruitment Plan:** Vertus Middle’s recruitment strategies will be tightly aligned with our mission to serve young men at risk of not completing high school. Led by the CEO, the School Leadership Team (SLT, consisting of the CEO, Principal, Director of Curriculum & Assessment, and Assistant Principal) will routinely analyze enrollment trends to ensure we enroll and retain a comparable number of students with disabilities, ELLs, and economically disadvantaged. All communication will be offered in English and Spanish, and we will hire Spanish-speaking staff to communicate directly with families to remove language barriers and communicate effectively with families. We will engage in community-based outreach through trusted spaces such as barbershops, libraries, and local events, building personal connections that lead to enrollment.

To recruit and support **students with disabilities**, we will emphasize our inclusive, relationship-based model and introduce families early to our specialized services. We will share information about our program with related service providers and social service organizations in the community. For **ELLs**, we have also partnered with local immigrant-serving organizations, such as the Rochester Public Library’s Youth Services team, to connect with emerging communities. These targeted efforts have helped Vertus High better reflect the linguistic diversity of our broader community, and we anticipate these efforts will prove effective at Vertus Middle, too.

In support of **economically disadvantaged and at-risk students**, our messaging will focus on the power of second chances and personal growth. We will highlight the structure, mentorship, and wraparound supports that make Vertus unique. For families facing economic challenges, we will make the application process accessible, flexible, and welcoming. Together, these strategies will ensure that our student body reflects the mission at the heart of Vertus: to prepare leaders of character for the community and the workplace, no matter their background or prior academic history.

Our commitment to retention is equally strong. Preceptors, in particular, will develop strong relationships with our students and monitor their engagement and attitude toward/perception of school. They will monitor early warning signs to proactively address signs of disengagement. That said, all staff will remain alert to attrition and report attrition risk immediately to the Assistant Principal. Our Special Education Teachers, Preceptors, and Academic Intervention Services (AIS) staff will have very close ties to our students, including students with disabilities and their families. Whenever possible, we will make changes to our support for students in order to retain them. Our ELLs will receive extra attention, given their language needs. A host of staff members will be attuned to their well-being, including the Preceptor, Teachers (both team teachers and subject teachers), ENL Teacher, Assistant Principal, and BIS. Our CEO is particularly attuned to attrition among special populations, scheduling and attending family meetings in person to proactively resolve concerns when there is attrition risk.

**Interest and Demand:** The applicant group has strong evidence that there is adequate support and increasing interest in Vertus Middle to meet its expected enrollment. Families and community members/leaders alike understand the significance and importance of creating a middle school so that students can begin on their path toward graduation and future success. As articulated fully in *E. Public Outreach*, significant evidence has been gathered through the following methods and events. Below is a summary of the interest and demand we have received:

- At the recent student focus group, 5 of 9 young men said that Vertus Middle would have been a good fit for them.
- Bryan Hickman, whose organization runs GoodSchoolsRoc.org, wrote in his letter of support that there were 124,00 visits to their website last year, as parents are eager to find a good school for their children. He explained that more than 6,000 students applied for approximately 2,000 available seats in the Rochester area. Data from his organization indicated that last year there were only 200 seats offered by charter schools for students going into the 7<sup>th</sup> grade with 600 applying and only 80 seats offered for 8<sup>th</sup> grade with more than 400 applying. His letter argued that “Vertus should have no trouble filling the seats of the junior high; Rochester’s parents need these seats for their children.”
- 68 individuals completed our recent survey with 65 (or 96%) indicating that Vertus has a strong reputation for supporting the academic and character development of young men.
- On an updated version of that survey, 52 of 55 respondents (95%) indicated that they would recommend Vertus to other families based on their current knowledge of experience. 46 of 55 (84%) respondents indicated that they have not heard any concerns or criticisms about Vertus that make them question the expansion. 43 of 55 (78%) respondents noted that if Vertus added a middle school, they would want to be involved in helping shape its design or programming
- At the Aberdeen Square Fair, 12 community members indicated Vertus Middle interests them as something new when completing a survey soliciting feedback.
- On a survey administered on March 29, 2025, 28 of 30 individuals indicated they would support the addition of a middle school to Vertus High. 28 of 30 individuals noted that if Vertus were to open a middle school, they would consider enrolling their child or recommending it to other families.
- At the Soul Music Festival in August 2024, over 150 individuals signed the petition indicating support for the middle school.
- On a survey administered over the last several years, 83 of 87 individuals indicated that, based on their experience with Vertus High, if Vertus had a middle school, they would enroll their son. 76 of 87 said if they have a younger son, they would send him to Vertus Middle (7 respondents do not have a son in middle school). 84 of 87 noted that Rochester would benefit from Vertus Middle School. And 77 of 87 responded that their son would have been better prepared for high school if he could have attended 7<sup>th</sup> and 8<sup>th</sup> grade at Vertus.
- And over the past several years, 11 community leaders and advocates have submitted letters of support for our school.

With the significant community support and interest gathered, and with an anticipated enrollment of 95 students, we are confident that we will be able to meet our enrollment

projections. In every survey that we have completed, respondents have overwhelmingly demonstrated an interest in and commitment to supporting the expansion of Vertus Middle.

**Proposed Application:** Vertus Middle will use an application that requests the minimum information necessary to determine eligibility for the school, e.g., age, completion of 6<sup>th</sup> grade, etc. The application will be translated into multiple languages and may be submitted in person, by mail or e-mail, or online. The admissions policy provided in *Attachment 1* describes the school's non-discrimination stance, preferences for already enrolled students, siblings, and residents of Rochester, and the enrollment process. Should there be more applicants than seats, Vertus Middle will use a public random lottery administered by a third party in mid-April each year to admit students and place the rest on a waiting list. Once admitted, families are guided through the enrollment process which includes document submission and a family orientation/back to school night.

**Enrollment Preferences:** Vertus Middle will use the following enrollment preferences permitted by § 2854(2)(b) and 8 NYCRR § 119.5 to enroll new students:

- Siblings of students already enrolled in Vertus Middle or Vertus High will have an absolute preference (Vertus Middle and Vertus High will merge educational corporations, which allows for this preference).
- ELLs will receive an absolute preference, i.e., will be drawn before students living in or outside the district.
- Students residing within the RCSD will receive an absolute preference, i.e., will be drawn before students living outside the district.
- Siblings of students selected in the lottery, i.e., when a student in the lottery with sibling(s) in the lottery is drawn, that student's sibling(s) will be added to the list.

**Vacancies:** Should a seat become vacant, the school will enroll students in order from the wait list. Vertus Middle is committed to serving at-risk students and will backfill all vacant seats until the end of the third quarter.

**Enrollment and Retention Targets:**

Enrollment and Retention Targets		
	Enrollment # / %	Retention # / %
Economically Disadvantaged	171 / 90%	To be determined
Students with Disabilities	41.8 / 22%	To be determined
English language learners	30.4 / 16% <sup>9</sup>	To be determined

<sup>9</sup> While the target enrollment for English language learners will be 16%, in alignment with the K-12 district percentages, we anticipate that we will serve approximately 12% of English language learners at the middle school (as described in *Target Student Population*); Vertus High currently serves 10% English language learners, as many students achieve English language proficiency prior to high school. Additionally, the 16% at RCSD reflects a K-12 population; 7<sup>th</sup> and 8<sup>th</sup> grade ELL data actually indicates that RCSD serves only 7% ELLs in 7<sup>th</sup> and in 8<sup>th</sup> grade. In light of serving middle school students, we anticipate that we will serve less than 16% English language learners but more than Vertus High. Regardless, we will seek to meet the targets set by our Authorizer and have developed a robust plan to recruit and retain English language learners.

**Meeting/Exceeding Targets:** The enrollment targets are based on the current enrollment levels at our district of location, RCSD, which currently serves 90% economically disadvantaged, 22% students with disabilities, and 16% ELLs, according to the latest enrollment data found on NYSED’s website.<sup>10</sup> Students at risk of dropping out are disproportionately low-income and more likely to be identified for special education and ELLs, making it highly likely that Vertus Middle will exceed the enrollment targets.

The school’s projected retention targets have not been established; publicly available SIRS and state assessment data provide overall enrollment numbers and subgroup performance rates but do not track individual student movement between years. As a result, it is not possible to calculate an exact cohort retention rate — defined as the percentage of students who remain continuously enrolled in the same school from one grade to the next — using only publicly reported information. Accurate retention analysis requires student-level longitudinal enrollment records, which are maintained locally but not released in aggregate public reports. Vertus Middle will collaborate with the Charter Schools Office who calculates retention to set targets. Experience tells us Vertus Middle will create a school community that retains high percentages of students, including those with disabilities, ELLs, and low-income students.

#### **G. PROGRAMMATIC AND FISCAL IMPACT**

**Programmatic Impact:** Vertus Middle will serve an at-risk population, including students in grades 7 and 8 who may not have been well-served in traditional settings. By enrolling students who have struggled behaviorally or academically, the school is expected to fill a gap and have a positive impact on surrounding schools (public and non-public) by helping re-engage these learners in a more personalized and supportive environment. By offering a specialized setting for students who may otherwise remain under-served or become disconnected from learning, Vertus Middle will alleviate pressure on public and non-public schools by reducing behavioral disruptions and chronic absenteeism while re-engaging students through our four key pillars. Vertus Middle aims to implement an innovative, replicable model that can offer best practices to other middle schools. Vertus Middle is committed to transparency and intends to foster a collaborative relationship with local schools and educational partners.

Vertus Middle proposes opening with 95 students in grade 7. In Year 2, the seventh graders will matriculate to grade 8 while a new cohort of seventh graders will join the school for a total of 190 students in grades 7 and 8. Given the small size and target population served, Vertus Middle anticipates a limited programmatic impact on other schools.

Similarly, as shown in the table below<sup>11</sup>, the projected fiscal impact is minimal, falling below 0.3% of the RCSD’s total general fund budget in all years of the charter term. Therefore, Vertus Middle is not expected to disrupt district finances or cause undue stress on public and nonpublic schools.

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<sup>10</sup> ROCHESTER CITY SCHOOL DISTRICT ENROLLMENT (2023 - 24)

<sup>11</sup> [https://stateaid.nysed.gov/charter/html\\_docs/prior\\_years\\_charter\\_rates.htm](https://stateaid.nysed.gov/charter/html_docs/prior_years_charter_rates.htm),  
[https://data.nysed.gov/expenditures.php?instid=800000061097&year=2023&utm\\_source=chatgpt.com](https://data.nysed.gov/expenditures.php?instid=800000061097&year=2023&utm_source=chatgpt.com),  
[https://www.budget.ny.gov/pubs/archive/fy26/ex/local/school/2526schoolaid.pdf?utm\\_source=chatgpt.com](https://www.budget.ny.gov/pubs/archive/fy26/ex/local/school/2526schoolaid.pdf?utm_source=chatgpt.com)



Projected Fiscal Impact upon District of Location							
Year	Number of Enrolled Students	Charter School Basic Per Pupil Tuition Rate	Total Charter School Per Pupil Cost to District	Estimated Additional Costs to District (e.g., SPED funds)*	Total Projected Funding from District	Total District General Fund Budget	Projected Impact on District Budget
2027-28	95	\$14,781	\$1,404,195	\$468,900	\$1,873,095	\$1,117,571,955	0.168%
2028-29	190	\$15,003	\$2,850,570	\$951,900	3,802,470	\$1,117,571,955	0.34%
2029-30	190	\$15,228	\$2,893,320	\$966,200	\$3,859,520	\$1,117,571,955	0.345%
2030-31	190	\$15,456	\$2,936,640	\$980,700	3,392,040	\$1,117,571,955	.352%
2031-32	190	\$15,688	\$2,823,900	\$995,400	\$3,126,418	\$1,117,571,955	.356%

\*\$7,961 per student at 20% of population

## H. COMMUNITY

**Definition of Community:** Vertus Middle defines community as an interconnected set of stakeholders, including students, families, educators (both current and former), neighborhood residents, civic leaders, youth-serving organizations, faith institutions, and local employers who are all invested in the academic and social well-being of Rochester's young men. While our immediate community includes staff, students, and their families, our broader community includes those who influence, support, and are impacted by the school—reflecting our belief that student success depends on strong, reciprocal relationships with the surrounding environment.

Our target population, male students in grades 7 and 8 who are academically behind, disproportionately impacted by poverty, and often disconnected from traditional schools, face multiple challenges, including trauma, housing instability, exposure to violence, and limited access to supportive educational options. However, Rochester is also home to tremendous strengths: a proud cultural identity, strong family ties, a vibrant faith community, and a resilient network of neighborhood organizations and partners who have advocated for youth for decades.

The school's four key design elements/pillars 1. Strong relationships; 2. Personalized year-round academics; 3. Character education; and 4. Career preparation—are directly informed by what our community has said it needs: structure, consistency, relevance, and relationships. These design elements build on the successful foundation of Vertus High, which has earned the community's trust by demonstrating that when students are supported with personalized instruction and caring adult relationships, they can re-engage and thrive—even after years of disruption.

We regularly engage with the broader community (before and after opening) through ongoing meetings with neighborhood groups, youth agencies, and local leaders. These relationships are not transactional; they are partnerships that shape how the school evolves. Open Board meetings provide a standing invitation for community members, including parents, educators, and neighbors, to raise concerns, offer ideas, and influence the school's direction. This culture of

openness and inclusion ensures that community voice remains at the center of the school's governance and identity.

Beyond voice, we aim to foster meaningful community connections for our students. For example, Vertus Middle will work to extend our partnerships with local businesses, including a nearby grocery store, to offer structured, supervised work-based learning opportunities that allow students to develop life skills, build confidence, and contribute to their home communities. These experiences are aligned with our broader mission: to prepare young men not only to succeed academically but to become leaders of character who give back to their communities. In fact, this proposed middle school is a direct response to repeated requests from current families, alumni, staff, and community leaders for Vertus to reach boys earlier, before they enter high school.

**Collaborative Culture:** At Vertus Middle, Preceptors serve as mentors and case managers for students and their families. Each student is assigned a Preceptor who becomes the primary communication link between the school and home, fostering deep, trusting relationships. Preceptors maintain regular contact through phone calls, texts, and in-person conversations, ensuring that families—especially those historically excluded from school engagement—have a direct and responsive point of contact.

While family engagement at a traditional school structure is often optional or irregular, at Vertus Middle, it is central to the school model. We have learned that this approach is especially critical for the students Vertus Middle will serve, many of whom face instability at home and enter middle school already behind academically.

We will supplement the Preceptor-family relationship with formal structures for inclusive engagement, such as Parents on Duty (POD), regular family nights, and communication platforms, including those that are multilingual. These structures ensure that all families—no matter their language, income, or background—have meaningful opportunities to influence and engage in school culture, program offerings, and supports.

**Processes, Practices, and Policies:** Vertus Middle will embed community input into school decision-making through structured engagement practices, inclusive governance, and transparent communication. Before opening, the founding team will continue organizing focus groups with families, educators, and youth-serving partners, hosted in collaboration with trusted organizations like the Center for Youth, Sisters of Mercy, and local churches. These sessions will surface insights and feedback on critical aspects of school design, including academic programming, student support services, school-day structure, and enrichment offerings.

Once the school is operational, POD will be formed to ensure ongoing family representation in school-level decisions. This council will meet quarterly with the SLT to provide input on school climate, engagement strategies, communication protocols, and parent partnership initiatives. Additionally, Vertus Middle will ensure that the Board of Trustees represents the community. Board composition will be reviewed annually to ensure it reflects the school's evolving student population and neighborhood demographics. Other community stakeholders, including former teachers and nonprofit leaders, will be invited to join the Board to reflect the diversity and lived experience of the community the school serves.

To promote transparency, accountability, and access to decision making, Vertus Middle will maintain open Board meetings that welcome participation from students, families, staff, and community members. These meetings serve as public forums where individuals can voice ideas, express concerns, and influence the school's strategic direction. This open-door governance approach affirms our commitment to shared ownership and collaborative problem-solving.

Feedback from the broader school community will also be gathered through formal channels, such as an annual family survey conducted during Family Night. Survey results will be shared with all staff during professional development sessions and directly inform school improvement planning. For example, input gathered will directly inform adjustments to curriculum pacing, afterschool programming, budget priorities for enrichment activities, and the effectiveness/appropriateness of our wraparound supports. In addition, student voice will be elevated through real-world engagement opportunities that connect them to their neighborhoods. These placements will be designed to build essential life skills, foster responsibility, and deepen students' sense of belonging and contribution within their community.

**School Designed for the Community:** The applicant team's decision to design Vertus Middle came directly from listening to stakeholders who saw the success of Vertus High and wanted its impact to start sooner, preventing students from falling behind in the first place or to accelerate student learning to better maximize high school years. Vertus Middle's academic and social-emotional model was created to address the complex and persistent challenges faced by Rochester's male seventh and eighth graders. Our foundation rests on the belief that strong relationships, structure, and personalization are essential to student success—particularly for boys who have struggled to thrive in traditional school settings. The Preceptor model, which assigns each student a dedicated mentor responsible for academic progress, social-emotional development, and family communication, ensures that no student is overlooked. This relationship-driven design provides the consistent adult guidance that families and community partners see as vital for boys navigating poverty, trauma, and disengagement.

The school's year-round calendar and mastery-based progression model directly address the academic gaps and interruptions that many Rochester students experience due to chronic absenteeism or prior school instability. Rather than advancing based on seat time, students move forward as they demonstrate mastery, allowing for both remediation and acceleration based on individual need. This academic flexibility is matched by a responsive approach to wellness and social-emotional learning, including character seminars, group advisories, and trauma-informed practices that acknowledge the lived experiences of our students and work to build their resilience and confidence.

In addition to these targeted supports, Vertus Middle also builds on the inherent strengths of the Rochester community by connecting students to local institutions, cultural resources, and real-world experiences. Families are invited to contribute to the life of the school through storytelling, cultural events, and leadership roles, reinforcing the idea that parents and guardians are not just school partners, but co-educators. Community voice will continue to shape program decisions, enrichment offerings, and school operations through regular feedback, advisory structures, and shared decision-making. As the needs of the community evolve, Vertus Middle is committed to



remaining responsive—adjusting programs, services, and supports to reflect the strengths and aspirations of the families we serve.

**Community Partners:** Vertus Middle views community partnerships as essential to achieving its mission and meeting the diverse range of student needs. These partnerships are not “add-ons,” but rather are embedded within the school’s design to expand learning opportunities, provide wraparound supports, and deepen connections between school and community. Several key partnerships that currently support Vertus High will be extended and refined to meet the developmental needs of younger students. For example, Sankofa will continue providing mental health services, including counseling and trauma-informed care for students facing social-emotional challenges. Edceptional will provide critical academic support through resources and data, while Charter Champions will include Vertus Middle in a number of initiatives (e.g., teacher pipeline, parent & family advocacy, policy advocacy for equitable funding) designed to ensure every child has access to quality, innovative education.

During the planning year, the school’s CEO (with support from the Assistant Principal once hired) will formalize agreements with each partner, ensuring that services are developmentally appropriate for middle school students and directly tied to clear academic and behavioral goals. New partnerships will also be developed to expand career exploration, family engagement, and enrichment opportunities. This includes establishing relationships with organizations that can offer mentoring, arts-based programming, and health services. One such partnership, already in development, will allow students to work in a local grocery store, providing a structured, supervised opportunity for real-world learning that reinforces responsibility, teamwork, and community pride. These partnerships allow students to experience success in diverse settings and build relationships with trusted adults beyond the school walls.

Community partnerships at Vertus Middle will continue to help Rochester students connect their learning to life, building confidence, and providing additional layers of support to ensure they can succeed in school and beyond.

**Evaluation:** Vertus Middle will implement a comprehensive and mission-aligned process to evaluate the effectiveness of its community partnerships. Each formal partnership will be guided by a written agreement (e.g., MOU or contract) that outlines a specific set of goals, timelines, and responsibilities of both the school and the partner organization. These agreements will include measurable outcomes tied to student academic progress, social-emotional development, attendance, or engagement. The school’s leadership, under the direction of the CEO or a designee, will conduct an annual review of each partnership to assess whether the stated objectives have been met and to determine the overall value added to the school program.

This evaluation will include both quantitative and qualitative data, such as student achievement metrics, behavioral indicators, and attendance records, as well as feedback collected through surveys of students, families, and staff. These surveys will help assess communication quality, cultural responsiveness, and perceived impact on student growth. The SLT will use these findings to inform decisions about renewing, modifying, or ending partnerships, and will share outcomes with the Board of Trustees and POD to ensure transparency and shared accountability. Moreover, feedback attained through the evaluation and surveys will inform adjustments to programming

(e.g., curriculum), student supports, and partnership priorities as we continually evolve to meet community needs.

By holding all partnerships to clear standards of alignment and effectiveness, Vertus Middle ensures that every external relationship contributes meaningfully to student learning and well-being. This process reflects the school's broader commitment to intentionality, accountability, and responsiveness in all aspects of its design and operations.

## **I. DISSEMINATION**

**Dissemination:** Vertus Middle is committed to both learning from and contributing to the broader educational community by sharing effective academic and social-emotional practices on an ongoing basis. The school will continue its regular participation in statewide forums such as the monthly New York Charter Schools Association (NYCSA) school leader meetings, which provide a structured opportunity to exchange strategies and learn from high-performing peers. These sessions will allow Vertus Middle to both adopt promising practices from other charter, district, and non-public schools and to share its own innovations, particularly in areas such as blended learning, restorative practices, and individualized academic supports.

Vertus Middle also plans to serve as a model for collaboration by opening its doors to educators from other schools and districts. Professional development sessions hosted by Vertus Middle will be made available to outside educators, offering collegial exchange, which is mostly rare in the Rochester area. In addition, the school will invite district and charter partners to observe its instructional model in action through scheduled site visits and classroom walkthroughs.

RCSD has seen changes in personnel from the Superintendent to the Cabinet to mid-level district leaders, with new employees starting on July 1. Efforts to communicate, collaborate, and share information with the district are scheduled to start later this summer. Our CEO will serve as the primary contact for our dissemination and partnership efforts. Resources we may share include, but are not limited to, staffing plan, advisory structures, intervention plans, and data monitoring tools. Looking ahead, Vertus Middle may seek to collaborate with partners to co-host regional learning events and roundtable discussions focused on critical topics like student engagement, relationship building, and school culture, actively contributing to the broader improvement of educational practice in Rochester and New York State.

## **II. EDUCATIONAL PLAN**

### **A. EDUCATION PHILOSOPHY**

**Philosophy:** Vertus Middle believes that educational excellence for all young men is achieved through an intentionally aligned model built on four pillars: strong relationships, personalized learning, character development, and purposeful preparation for the future. The approach is rooted in research on adolescent development, engagement, and effective practices for serving historically underserved middle-grade students through a holistic approach that nurtures both academic achievement and social-emotional growth. At the heart of the school's philosophy is the conviction that consistent, caring relationships drive student success. Small learning teams and daily support from Preceptors—dedicated mentors and role models—will ensure that every

student is seen, known, and guided. This structure will foster trust, belonging, and a safe environment for overcoming barriers to learning.

**Research:** Vertus Middle’s rigorous, blended learning experience aligns with research on extended-year and personalized education. Notably, Dewey’s progressive educational philosophy is often seen as a foundational influence on personalized learning, as he emphasized that education should be grounded in students’ interests, experiences, and capabilities.<sup>12</sup> With a 200-day school year and individualized learning plans, students will benefit from flexible pacing, real-time data, and targeted supports that close academic gaps, accelerate progress, and build readiness for high school. This year-round, student-centered approach empowers every learner to take ownership of their growth and thrive in a structured, high-expectations environment.

Launching Vertus Middle is a critical step in reaching students earlier, before academic and behavioral challenges become entrenched. By starting in 7<sup>th</sup> grade, Vertus Middle can provide intensive support during a fundamental developmental period—helping students master foundational skills, build strong habits, and arrive at high school ready for on-grade-level instruction. This aligns with research from the Center on the Developing Adolescent, which highlights early adolescence (ages 10–14) as a critical window for shaping long-term academic and behavioral trajectories.<sup>13</sup>

Moreover, addressing academic gaps before high school helps reduce the number of overage, under-credited students—students who are behind in credits for their age and grade—who are at significantly higher risk of dropping out.<sup>14</sup> Studies of urban districts demonstrate that early warning indicators, such as low attendance, poor grades, and behavioral issues in middle school, strongly predict whether a student will become overage, under-credited in high school. Effective middle school interventions—particularly those providing extra time, targeted support, and consistent adult mentorship—are proven to decrease these risks.<sup>15</sup> Vertus Middle’s early intervention model directly responds to these findings by providing the time, structure, and relationships needed to keep students on track for promotion and graduation.

Ultimately, Vertus will serve students in grades 7-8 and 9–12, allowing for a seamless, six-year continuum that accelerates learning and improves long-term outcomes. Research reveals the fewer transitions, the better chance a student has of completing high school; further, the higher the transition grade level, the higher the dropout rate, most significantly for boys.<sup>16</sup> Of added importance is the school’s focus on character development. Regular seminars (See Schedule in *Attachment 4a*), small group pull-outs, one-on-one restorative conversations, and service projects will build resilience, empathy, and leadership. These are anchored in the core virtues of courage, responsibility, and leadership. Finally, Vertus Middle will introduce career exploration early to help students connect their learning to real-world goals. By connecting learning to real-world pathways, the school builds motivation, purpose, and readiness for life beyond the

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<sup>12</sup> Dewey, J. *Democracy and Education: An Introduction to the Philosophy of Education* (Collier-Macmillan, 1916)

<sup>13</sup> <https://developingadolescent.semel.ucla.edu>

<sup>14</sup> Allensworth & Easton, 2005; Balfanz, Herzog, & Mac Iver, 2007

<sup>15</sup> Balfanz, 2009

<sup>16</sup> <https://www.sgdsb.on.ca/upload/documents/june-28-12-post-arc-research-7-12-school.pdf>

classroom, guiding a research-based model that prepares each student for high school and beyond.

## **B. CURRICULUM**

**Curriculum Selection and Development:** Vertus Middle will implement a strategic, student-centered process to select and develop curriculum that meets the needs of academically at-risk young men in Rochester through a balanced combination of high-quality teacher-led instruction and blended learning. The SLT will lead a comprehensive review of instructional materials across all core content areas. This process will be guided by the school's instructional priorities: academic rigor, cultural relevance, standards alignment, and developmental appropriateness. The team will select resources that build knowledge and skills across grade levels, ensure coherence within and between subjects, and prepare students for success on state assessments and Regents exams (for students in accelerated courses).

All materials will be evaluated for alignment to the New York State P-12 Next Generation Learning Standards (NGLS), evidence of effectiveness with diverse student populations, and adaptability to support Vertus Middle's blended, personalized Learning Lab model. The selection process will emphasize materials that support strong instructional delivery, including comprehensive teacher guides, formative assessments, and tools for differentiation and scaffolding. Teachers will use these materials to craft rigorous, relevant lessons that promote discussion, inquiry, and academic ownership.

To support and extend classroom learning, Vertus Middle will implement a blended Learning Lab model where digital resources will supplement teacher-led instruction, reinforce skills, provide adaptive practice, and offer students additional pathways to mastery. All digital content will be reviewed for clarity of learning objectives, alignment with state standards, embedded assessments, and usability for diverse learners. Materials must also demonstrate accessibility, integrate Universal Design for Learning principles, and support students with disabilities, ELLs, and those performing significantly below grade level.

In selecting both print and digital curriculum resources, Vertus Middle will apply a consistent evaluation framework. The SLT will examine whether each program clearly defines learning goals, supports active student engagement, offers varied opportunities for assessment, and integrates content, technology, and instruction into a cohesive learning experience. Vertus Middle will prioritize materials that are culturally relevant, bias-free, and appropriate to students' reading levels and lived experiences.

All curriculum resources will be selected and refined through a collaborative process involving teachers and school leaders. During annual summer professional development, teams will review curriculum scope and sequence documents, pacing guides, and unit plans. Throughout the school year, materials will be continuously evaluated and revised based on student performance data, teacher input, and observation.

**Alignment:** Vertus Middle will ensure horizontal and vertical curriculum alignment through a collaborative, data-driven process designed to meet the needs of all students, including students with disabilities, ELLs, advanced learners, and those performing below grade level. Each summer, teachers and the SLT will attend summer professional development, evaluate student success,

and then meet with the academic team to review data and assign revisions of curriculum maps, scopes, sequences, and unit plans. These sessions will align instruction with NYSLs and state assessment expectations, build skills across grade levels, and incorporate scaffolds and enrichment.

During the school year, data team meetings (weekly) and collaboration will maintain horizontal alignment. Teachers will analyze i-Ready and classroom assessment data, adjust pacing and instructional strategies, and collaborate across subjects to ensure key skills are reinforced before students are expected to demonstrate mastery. Instruction will be interdisciplinary and responsive, giving students multiple opportunities to engage with essential concepts in varied contexts. Importantly, vertical alignment will be strengthened through annual planning and the use of platforms like Edgenuity, which will build content depth and complexity over time. Because Vertus Middle will use a mastery-based model, students will progress based on their learning rather than age or grade level.

Curriculum will remain flexible and individualized, allowing teachers to tailor instruction based on real-time performance data. Teachers will play a central role in ongoing curriculum review and refinement, using student data to adjust and ensure alignment to standards. The SLT will oversee implementation and ensure the use of high-quality, developmentally appropriate instructional materials. Through this continuous improvement cycle, Vertus Middle will deliver rigorous, standards-aligned instruction that is personalized to each student's learning path.

**Organization and Resources:** At Vertus Middle, the curriculum will be organized through curriculum maps, scope and sequence documents, and pacing guides that ensure coherent, rigorous, and standards-aligned instruction. These tools describe a vertical sequence of learning targets and a year-at-a-glance view of what is being taught and assessed across disciplines. They are the foundation for all planning, instruction, and assessment. Curriculum maps will outline major content themes, priority standards, and instructional outcomes. Scope and sequence documents will structure the order of instruction, identifying when key skills should be introduced, practiced, and mastered. Pacing guides will provide timelines aligned to assessment cycles, allowing for acceleration, reteaching, and cross-curricular integration. While these tools ensure consistency, they are designed to be flexible; teachers will adapt them based on ongoing data and individual student needs, particularly for those who are below grade level, multilingual, or in need of enrichment.

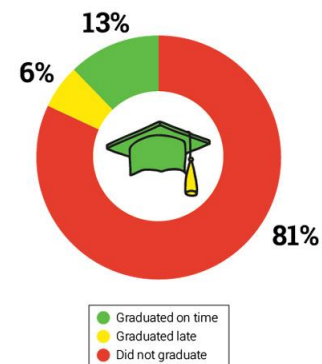
Vertus Middle will implement high-quality curricula, including Amplify for ELA (or similar), a rigorous math program, and Edgenuity for blended and online instruction. These programs include built-in tools—such as unit guides, embedded assessments, and data dashboards—that support teachers in delivering daily, grade-level instruction while identifying opportunities for targeted intervention and acceleration. Curriculum development and evaluation will be led by the teachers with support from the Director of Curriculum and Assessment and Assistant Principal. Teachers will play a central role in assessing and refining curriculum through review of student work, assessment data, and classroom experience. During summer professional development, staff will review and revise materials based on data, with weekly professional learning communities continuing this work throughout the year.

**Curricular Materials:** While the RCSD 2024–25 Academic and Financial Plan indicates that the district of location intends to implement new language arts and math curricula beginning in 2025–26, current student outcomes reveal an urgent and ongoing need for deeper, more effective interventions. More than 60 percent of seventh and eighth graders are performing three grade levels below in reading and math, highlighting persistent instructional gaps. When Vertus Middle opens in 2027–28, it will address these gaps head-on by implementing a rigorous, blended instructional model that prioritizes adolescent literacy and math readiness. The school will draw on high-quality commercial curricula, adaptive technology, and teacher-developed resources to deliver instruction that is aligned with the NGLS and selected for their evidence-based design, cultural relevance, accessibility, and demonstrated effectiveness with diverse learners.

**ELA:** Literacy is a foundational priority at Vertus Middle. According to the RCSD’s most recent data, 88 percent of male seventh graders and 82 percent of male eighth graders are not proficient in ELA, with the majority scoring at Level 1, demonstrating limited knowledge and skills. These outcomes reflect a crisis. Research from EdTrust–NY highlights the critical importance of adolescent literacy in shaping a student’s future academic success and long-term opportunities. In response, Vertus Middle will adopt a comprehensive literacy approach centered on high-quality instructional materials and engaging routines that build students’ ability to read, write, and think critically. The school will adopt a top-rated curriculum such as Amplify ELA or a comparable program for grades 7 and 8. Grounded in NYSED’s Science of Reading principles, these curricula emphasize structured routines, explicit vocabulary instruction, fluency, and comprehension strategies. Amplify ELA, for example, integrates digital and print components and is designed specifically for middle school learners, allowing students to engage deeply with complex texts, construct evidence-based arguments, and make meaningful connections to their own lives. During the Learning Lab period, students will also participate in *Literacy Lab*, a dedicated reading course focused on strengthening foundational literacy skills while preparing them for the demands of high school coursework.

**Math:** Mathematics instruction will be equally responsive to student needs. Vertus Middle will enroll students who have just completed sixth grade, a critical year that often predicts future academic outcomes. Many of these incoming students will have experienced learning disruptions or struggled with foundational math concepts. In the RCSD, only 15 percent of male seventh graders and 4 percent of male eighth graders demonstrate proficiency in math. Research shows that failing a math course in sixth grade is one of the strongest predictors of not graduating high school—more so than a student’s race or English learner status. To interrupt this trajectory, Vertus Middle will offer a coherent sequence of Math 7, Math 8, and Pre-Algebra instruction using rigorous, research-based curricula such as EngageNY/Eureka Math, eMath Instruction, and Illustrative Mathematics. These programs emphasize conceptual understanding and real-world problem-solving. Adaptive platforms like Delta Math, Mathigon

81% of students who failed a math course in sixth grade failed to graduate high school





Polypad, and GeoGebra will provide personalized practice, formative feedback, and data to inform targeted support.

**Science and social studies:** Science and social studies will be delivered through Edgenuity, a digital curriculum aligned to state standards and built around Universal Design for Learning principles. Edgenuity’s multimedia-rich content includes embedded assessments, scaffolds, and real-time progress monitoring features that help differentiate instruction and support student mastery.

**Seminar curriculum:** Vertus Middle’s Seminar course will be a character-based advisory period taught by Preceptors with support from the SLT. The curriculum will be organized around monthly themes and will focus on character development, workplace readiness, study skills, literacy, and leadership. Seminar, mission aligned to develop men of character, will serve as a central structure for supporting students’ personal growth and preparing them for success in school and beyond. The Seminar curriculum will draw on a variety of evidence-based sources, including the Expeditionary Learning CREW curriculum; Bruce Tuckman’s work at Ohio State’s Dennis Learning Center (especially Individual Learning and Motivation: Strategies for Success in College); Carol Dweck’s research on growth mindset; the KIPP character curriculum; and national workplace readiness frameworks. Students will write short reflective and argumentative papers each week to strengthen their writing and critical thinking skills. They will also give regular oral and multimedia presentations to build confidence and communication skills. A key feature of Seminar will be the development and regular revision of each student’s Individual Life Plan (ILP)—a personalized roadmap that helps students set goals, reflect on progress, and take ownership of their future. Preceptors will assess students regularly on Character Development and Career Education benchmarks and provide feedback tailored to each student’s growth. The SLT will develop the full Seminar curriculum for grades 7 and 8, including weekly lesson plans and materials. This work will be supported by members of the design team and experts in adolescent development, literacy, and college and career readiness.

The SLT will guide the selection, evaluation, and refinement of all instructional materials in partnership with teachers. Final curriculum selections will be based on alignment to NGLS, demonstrated effectiveness in raising student achievement, adaptability for intervention and enrichment, and compatibility with the school’s blended Learning Lab model.

**Unique and Innovative Aspects:** Vertus Middle’s curriculum will include several innovative features that directly align with the school’s educational philosophy and mission to prepare students for high school, college, and meaningful careers. The school has been designed around the school’s four key design elements: strong relationships, personalized year-round academics, character education, and career preparation. A distinctive aspect of the curriculum will be the blended Learning Lab model, which combines adaptive online platforms with small-group, teacher-led instruction and project-based learning. This model will enable students to move at their own pace, receive targeted interventions, and engage in enrichment opportunities based on real-time data. It will support students with disabilities, ELLs, and those entering below grade level by allowing instruction to be personalized and flexible within a rigorous, inclusive setting.

The curriculum will also integrate early CTE into the middle grades. Through Seminar, Project Lead the Way (PLTW), and embedded classroom activities, students will be introduced to a range



of career pathways and develop essential life and workplace skills such as creative and critical thinking, problem solving, and communication. For example, PLTW will expose students to computer science, engineering, biomedical science, and technology as they build real-world skills and career readiness. This supports the school's mission by helping students connect academic learning to future goals and fostering long-term motivation and interest in pathways or careers.

The character education component will be woven into the daily curriculum through structured seminars, advisory discussions, and mentoring relationships with Preceptors. Each student will have an ILP, which tracks progress across all domains and enables staff to tailor instruction and support to each student's needs.

These curriculum features reflect Vertus Middle's core belief that students thrive when instruction is personalized, rigorous, and connected to real-world outcomes. The use of flexible, mastery-based progression; early goal-setting; and strong relational support will ensure alignment with the school's mission and key design elements while providing all students with the academic foundation and personal growth needed for future success.

**Supporting Research and Existing Model:** The Vertus Middle curriculum will build on the proven practices and research-based strategies implemented at Vertus High, which has effectively served some of Rochester's most at-risk young men with a model centered on personalization, structure, and strong relationships. The proposed middle school curriculum draws from this foundation and is supported by national research and high-performing school models that emphasize mastery-based learning, culturally responsive pedagogy, and the science of reading.

Vertus Middle's blended Learning Lab model is grounded in research on personalized learning, which shows that when students receive instruction tailored to their individual strengths, needs, and pace, they demonstrate greater academic growth and engagement. Studies from the RAND Corporation and Quality Matters as well as other meta-analyses support the effectiveness of personalized, competency-based models that use technology to support differentiation and real-time feedback, consistently showing that well-designed blended learning can achieve equal or superior outcomes compared to purely face-to-face instruction.<sup>17</sup> The Learning Lab structure will allow students to build foundational skills, accelerate when ready, and receive timely support from educators, which is especially critical for students who have experienced prior academic disruption.

The proposed ELA curriculum, such as Amplify ELA, is built on the science of reading and incorporates evidence-based practices such as explicit vocabulary instruction, repeated exposure to complex texts, and text-based writing tasks. These approaches are supported by extensive literacy research, including findings from the National Reading Panel and NYSED's own Literacy Briefs, which emphasize systematic skill development and daily access to grade-level texts for all learners. Vertus Middle's decision to prioritize high-quality instructional materials rated "green" by EdReports ensures alignment with national standards for rigor, coherence, and usability. In mathematics, Vertus Middle's use of programs like eMath Instruction, Delta Math, and Illustrative Mathematics is supported by research on conceptual learning and standards-based instruction. These programs promote problem-solving, reasoning, and mathematical discourse,

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<sup>17</sup> <https://www.verifyed.io/blog/blended-learning>

aligning with the National Council of Teachers of Mathematics (NCTM) recommendations and New York’s Next Generation Math Learning Standards. These tools also provide scaffolded supports and visual models, which are especially beneficial for ELLs and students who struggle with abstract concepts.

Edgenuity has served over 500,000 students annually for more than 15 years and is widely used in New York State, including by multiple BOCES and school districts such as White Plains, Pleasantville, and Oneonta. It offers over 100 standards-aligned courses for grades 6–12 across core subjects, electives, career pathways, and Regents exam preparation. Edgenuity’s curriculum is grounded in research-based practices that promote higher-order thinking, scaffolded instruction, and metacognitive skill development. Courses are designed using principles of Universal Design for Learning and effective multimedia instruction to reduce cognitive load and increase accessibility. Fully aligned with NGLS, Edgenuity will support Vertus Middle’s personalized, mastery-based model and prepare students for success on state assessments and more. Project Lead the Way (PLTW) helps middle school students build confidence, stay engaged in learning, and develop critical thinking and problem-solving skills. Studies show that PLTW students often perform better academically, feel more prepared for future studies, and are more likely to explore interests in science, technology, and engineering.<sup>18</sup> Finally, the early integration of career exploration into the middle grades reflects best practices outlined by the Association for Career and Technical Education (ACTE) and the National Collaborative on Workforce and Disability. Research shows that when students begin exploring career interests and developing soft skills in middle school, they are more likely to stay engaged in high school and set meaningful postsecondary goals. Vertus Middle’s model weaves these opportunities into advisory and academic courses, helping students connect their learning to future pathways and building the motivation and clarity needed to persist.

**Benchmark 1:** This benchmark requires that students demonstrate proficiency and growth on state assessments, and that all subgroups—including ELLs, students with disabilities, and academically at-risk students—make measurable academic progress. To meet this benchmark, Vertus Middle will implement a curriculum that ensures consistent access to rigorous, grade-level instruction while supporting diverse learning needs. The selected curriculum will be fully aligned to the NGLS, ensuring that all instructional content reflects what is assessed on state exams. It will include embedded formative assessments and progress-monitoring tools to provide real-time data on student learning. These features will enable teachers to make timely instructional adjustments and deliver targeted interventions that keep students on track toward mastery. To support equity and access, the curriculum will incorporate scaffolds, language supports, and differentiated entry points, allowing teachers to meet students at their current level while maintaining high expectations. Vertical alignment across grade levels will ensure that students build essential skills over time, preparing them to meet current proficiency benchmarks and sustain achievement in high school.

**Supplemental Curriculum:** Vertus Middle will implement a robust suite of supplemental curricula to support students with disabilities, ELLs, those requiring academic intervention, and students

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<sup>18</sup> <https://stemworks.wested.org/program/project-lead-the-way/>,  
<https://www.umkc.edu/news/posts/2021/october/umkc-research-confirms-project-lead-the-way-impact.html>

identified under the school's priority design criteria. These supports will ensure that all students receive the targeted instruction and care needed to thrive. In ELA, programs such as Accelerated Reader 360 and Achieve3000 will offer differentiated, adaptive practice to build fluency, comprehension, and reading stamina across varying proficiency levels. In math, supplemental tools including eMath Instruction, Delta Math, Mathigon Polypad, GeoGebra, and Accelerated Math 2.0 will reinforce conceptual understanding, provide scaffolded practice, and support mastery of grade-level standards. Illustrative Mathematics tasks and Achieve the Core resources will also be used for skill development and formative assessment.

Students identified for intervention—through i-Ready diagnostics, classroom data, or teacher input—will receive targeted small-group or one-on-one instruction from AIS staff. Instruction will be personalized based on real-time data to accelerate progress. Students with IEPs will receive services aligned to their plans through both push-in and pull-out models delivered by certified special educators. ELLs will benefit from integrated scaffolds, structured language development strategies, and visual supports embedded in both core and supplemental resources.

Teachers will supplement Edgenuity's science and social studies courses by supporting writing skills, lab completion, and group instruction. They may also integrate novels or texts that build on the historical and civic concepts introduced in Edgenuity's lessons. Social-emotional learning and character development will be supported through a structured advisory curriculum focused on identity, goal setting, emotional regulation, and decision-making. Restorative practices and team-based behavioral coaching will promote a safe, inclusive, and relationship-centered school culture. All supplemental materials will be selected by the SLT based on alignment to standards, cultural responsiveness, and demonstrated success with similar student populations. These supports will ensure every student has equitable access to academic achievement, personal growth, and high school readiness.

### **C. INSTRUCTION**

**Instructional Strategies:** Vertus Middle will deliver instruction through a blended learning model that combines direct teacher-led instruction, small group learning, individualized academic coaching, and real-world application. This multifaceted approach is intentionally designed to meet the diverse needs of all students—including students with disabilities, ELLs, and those at risk of academic failure—by offering multiple access points and personalized pathways to mastery.

Instruction will be highly differentiated and grounded in ongoing diagnostic and progress-monitoring data, including i-Ready assessments, classroom formative checks, and interim benchmarks. Teachers will use this data to identify learning gaps and tailor instruction through flexible grouping, scaffolded content, adjusted pacing, and strategic pre-teaching and re-teaching of key concepts. Instructional techniques such as modeling, think-alouds, guided practice, and frequent comprehension checks will be embedded throughout lessons to ensure accessibility and support deep understanding.

An Integrated Co-Teaching (ICT) model will be implemented in each classroom and in the Learning Lab, with general education teachers working alongside certified Special Education Teachers, AIS staff, and Preceptors. This collaborative structure will allow for individualized

supports aligned to IEPs and 504 plans, including tools such as guided notes, vocabulary previews, visual aids, executive functioning supports, and targeted behavioral interventions. Staff will receive continuous professional development to ensure effective implementation of these supports within an inclusive classroom environment.

Technology will play a central role in personalization. The Edgenuity platform, including the MyPath™ program, will supplement core instruction and provide remediation and enrichment tailored to each student's skill level. Aligned with i-Ready diagnostics, Edgenuity incorporates features such as text-to-speech, closed captioning, translation tools, and adjustable pacing, all of which reflect Universal Design for Learning principles. Teachers will monitor usage and performance data to make real-time instructional adjustments and provide additional in-person support as needed.

Vertus Middle will emphasize culturally responsive instruction that incorporates students' cultural identities, lived experiences, and community contexts into the curriculum. English language arts, for instance, will feature texts by authors of color and explore themes of identity and social justice, creating meaningful connections and fostering critical thinking, especially among ELLs and marginalized students. Academic content will be regularly tied to real-world learning experiences, helping students make connections to their personal goals and future aspirations, which increases motivation and engagement.

Professional development will be embedded in daily practice. Teachers will participate in frequent coaching and feedback cycles with the Assistant Principal and receive training in research-based techniques from *Teach Like a Champion 3.0*. These strategies—including “Culture of Error,” “Positive Framing,” and “Joy Factor”—will help build classrooms that are both rigorous and supportive, promoting student agency, persistence, and a growth mindset.

Taken together, these instructional strategies will form a comprehensive and inclusive model that ensures every student at Vertus Middle receives meaningful, rigorous, and personalized instruction. This approach will prepare all learners for long-term academic success and empower them to thrive both in school and beyond.

**Pedagogical Approach:** Vertus Middle's pedagogical approach is rooted in the Four Pillars that define Vertus High: strong relationships, personalized year-round academics, character education, and career readiness. These design elements will be intentionally integrated into the school's instructional model to ensure that every student—particularly those with disabilities ELLs, and students at risk of academic failure—has access to rigorous, relevant, and individualized learning experiences.

**Rigorous and Engaging Instruction:** Vertus Middle defines rigorous and engaging instruction as academically challenging, culturally responsive, and personalized to meet the needs of every learner. This will be achieved through a blended instructional model that integrates direct teaching, small-group learning, and individualized academic support with adaptive digital tools and real-world applications. Engagement at Vertus Middle means active student participation and ownership of learning. Teachers will use instructional strategies such as Socratic seminars, turn-and-talks, project-based learning, and hands-on activities that promote discussion, inquiry, and deeper connection to the material. These approaches will ensure that all students engage

with grade-level content in meaningful, varied formats that foster mastery, critical thinking, and relevance.

Instruction will be rooted in continuous assessment. Teachers will use diagnostic and formative data—such as i-Ready results and classroom-based checks for understanding—to inform instructional planning and real-time adjustments. Differentiated strategies, including scaffolded instruction, flexible grouping, guided notes, and strategic re-teaching, will be embedded into daily practice. Students with disabilities and ELLs will receive targeted supports and accommodations through an Integrated Co-Teaching model, which ensures equitable access to the curriculum in inclusive settings.

Technology will play a strategic role in deepening learning. Edgenuity's MyPath™ platform will extend core instruction by delivering personalized lessons aligned with student data. With built-in supports such as text-to-speech, translation, captioning, and self-paced modules, the platform supports Universal Design for Learning principles and reinforces content mastery. AIS Staff will closely monitor usage and intervene with coaching when students encounter challenges.

Vertus Middle will embed cultural relevance into curriculum design to foster engagement. Teachers will incorporate students' identities, lived experiences, and community contexts into lessons to ensure instruction is meaningful and motivating. For instance, English Language Arts units may center on texts exploring race, equity, and social justice, helping students develop critical thinking skills while reflecting on their own narratives and values.

Instructional rigor and educator effectiveness will be sustained through ongoing professional development and coaching.

**Research and Existing Models:** Vertus Middle's instructional approach is grounded in well-established, research-based models that support academic growth, equity, and student engagement. The school's blended learning design draws on the work of Horn and Staker (2015), who found that combining in-person instruction with adaptive online tools allows for more individualized pacing, differentiated support, and improved learning outcomes—particularly for students at risk of academic failure. The model also incorporates Universal Design for Learning principles as outlined by CAST, which emphasize flexible approaches to content, engagement, and assessment. Universal Design for Learning has been shown to improve access to rigorous curriculum for all learners, especially students with disabilities, ELLs, and those with executive functioning challenges. By embedding multiple means of representation, expression, and engagement, Vertus Middle will ensure that instruction is accessible and inclusive.

Edgenuity's MyPath™ platform, used to personalize instruction in ELA and math, is supported by third-party efficacy studies showing significant gains in reading and math achievement for students who engage in tailored learning pathways. The program's alignment with student performance data and integration of scaffolds like read-aloud, translation, and closed captioning further enhances its effectiveness for diverse learners.

Vertus Middle will use real-time data to drive instruction and intervention, which also reflects best practices in formative assessment research that emphasizes the importance of using timely

feedback to close learning gaps.<sup>19</sup> Additionally, the school's focus on culturally responsive teaching is informed by the work of Gloria Ladson-Billings and others, who highlight how integrating students' cultural backgrounds into instruction promotes engagement, relevance, and academic identity.

Together, these research-based models support Vertus Middle's comprehensive, inclusive, and mission-aligned instructional approach—one that will prepare all students for academic achievement, personal growth, and long-term success.

#### **D. SPECIAL STUDENT POPULATIONS AND RELATED SERVICES**

**Identification:** Vertus Middle will take a proactive, compliant, and student-centered approach to identifying and supporting students with disabilities. The school will follow all New York State procedures and fully comply with the Individuals with Disabilities Education Act (IDEA), including the Child Find provisions outlined in 34 C.F.R. § 300.125 to identify students who have or may have exceptional needs.

**Students with Existing IEPs:** Vertus Middle students with special needs will likely enroll with an existing IEP. Upon enrollment, families will meet with the Specialized Services Coordinator to review and immediately implement the IEP. The Specialized Services Coordinator will coordinate with the RCSD Committee on Special Education (CSE) to ensure services begin promptly and reflect the student's current needs.

**Students Without Existing IEPs:** Vertus Middle will employ a proactive, multi-tiered approach to identify students who may need special education services, in full alignment with NYS regulations. Through its robust Child Find system, the school will use intake assessments, staff training, feeder school collaboration, and real-time data analysis to flag students who are struggling. Teachers will be trained to recognize early academic or behavioral warning signs, and students showing concern will be supported through a tiered RtI process. Tier 2 interventions will include small-group instruction and targeted online practice; if insufficient, Tier 3 will offer intensive, individualized support. When students do not respond to interventions, the Specialized Services Coordinator and RtI team will initiate a referral to the CSE. Vertus Middle will work closely with the CSE and families to ensure timely evaluations and the development of responsive IEPs.

**Serving students who are struggling academically and are at risk of academic failure:** Vertus Middle is intentionally designed to re-engage students who are academically behind or at risk of failure through a personalized, high-support academic model that is grounded in responsiveness. The Learning Labs will blend live instruction, adaptive online platforms, and hands-on projects to deliver a flexible, student-centered model, allowing students to work at their own pace, with real-time monitoring. If a student struggles or disengages, the system will alert staff to intervene immediately. Preceptors will stay with students throughout the day, offering academic guidance and social-emotional support. Because personalized learning is built into the culture, intervention is stigma-free and expected. Students needing extra support will receive targeted instruction through our RtI framework, aligned with NYS regulations. AIS staff and Special Education Teachers will deliver tiered supports, and students identified via i-Ready and internal benchmarks will attend dedicated ELA or math intervention classes at least twice per week; this is purposely

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<sup>19</sup> Black & Wiliam, 2009



built to re-engage students who are academically behind through a personalized, high-support model

**Students who qualify for the identified priority school design:** Through early, targeted interventions and personalized academic support, the school will aim to prevent students, particularly those with very low academic readiness or a history of struggling in traditional school settings from becoming over-age and under-credited by identifying learning gaps early and addressing them through consistent mentorship, small class sizes, and differentiated instruction.

Our wraparound model will integrate academic and non-academic supports. Economically disadvantaged students and families will have access to an on-site food pantry and clothing closet, reducing barriers to attendance and engagement. Vertus Middle will also provide research-based, systematic interventions the moment a student begins to struggle, whether academically, behaviorally, or emotionally. Staff will collaborate across disciplines to ensure no student falls through the cracks. Our school culture will prioritize persistence, growth, and achievement, recognizing that students succeed when their immediate needs are met and their long-term potential is nurtured.

For students who are economically disadvantaged, Vertus Middle will ensure access to high-quality instruction as well as the essential resources that contribute to stability and focus. Our wraparound support services will include an on-site food pantry and clothing closet—practical tools that help reduce family stress and promote consistent attendance and engagement. These non-academic supports will be integrated into the broader academic program, ensuring students can focus on learning without distraction.

**Serving Students with Disabilities:** Vertus Middle will work diligently to provide all students with a free and appropriate public education by educating them in the least restrictive environment appropriate for their needs, using a case management approach led by a part-time Specialized Services Coordinator. Special education services will be provided under a collaborative inclusion model. To the greatest extent appropriate, Vertus Middle will provide push-in services to assist students in their general education classes by collaborating and/or co-teaching with the classroom teachers. Each Learning Lab will include a certified Special Education Teacher, allowing for Special Education Teacher Support Services (SETSS) and Integrated Co-Teaching (ICT) within a highly inclusive environment for 3.5 hours daily. Additional small-group pull-out services will be provided according to each student's IEP. Instruction will be flexible and responsive; staff will monitor engagement in real-time through direct observation and software alerts. Lessons will be adjusted or enriched based on student needs. Preceptors and teachers will provide academic and behavioral support, and Edgenuity's built-in scaffolds (e.g., read-aloud, translation tools, interactive visuals) will make content accessible for all learners.

**Serving ELLs:** See *Attachment 13*.

**Serving gifted and advanced students:** Vertus Middle will challenge gifted students through personalized learning paths, allowing them to accelerate and explore complex topics. The Learning Lab structure will support deep engagement through project-based learning, advanced Edgenuity coursework, and independent research. Teachers will differentiate content, process, and product, while flexible grouping will ensure students are both supported and intellectually



stretched. Interest-based projects and enrichment experiences will promote creativity, autonomy, and critical thinking.

**Rationale:** Vertus Middle’s model is intentionally designed to fulfill its mission to develop strong men of character who are prepared for college, careers, and life by providing a structured, supportive, and personalized educational environment. The school’s instructional design and intervention strategies reflect a belief that every student can succeed when given individualized support, high expectations, and the right conditions for learning. Vertus Middle’s philosophy centers on the conviction that strong relationships, academic excellence, and responsive systems are critical to re-engaging students and setting them on a path to excel in high school, graduate, and succeed in life.

**Grounded in Research:** Vertus Middle’s approach to serving special populations is grounded in research-based best practices and aligned with state and federal requirements. The implementation of ICT is supported by a wide body of evidence demonstrating that inclusive models improve academic outcomes and social integration for students with disabilities, particularly when co-teachers plan collaboratively and provide differentiated instruction.<sup>20</sup> The school’s use of a Multi-Tiered System of Supports (MTSS), including its embedded Response to Intervention (RtI) practices, aligns with recommendations from the National Center on Intensive Intervention (NCII), which emphasize early identification, tiered intervention, and data-based decision-making as essential to improving outcomes for struggling learners. Vertus Middle will follow Section 100.2(ii) of the NYSED regulations, ensuring that interventions are research-based, systematically delivered, and closely monitored.

Additionally, Vertus Middle’s use of personalized learning platforms such as Edgenuity is supported by research indicating that adaptive learning technologies can improve achievement when used alongside skilled instruction (Pane et al., 2015; Wolf, 2010). Such tools offer accessibility features and targeted instruction that benefit students with learning differences. Finally, the consistent presence of Special Education Teachers in each Learning Lab will allow for both push-in and pull-out services to be delivered without interrupting the student’s experience of community and routine. This reflects the school’s belief in equity, belonging, and structure—all central to its mission and supported by research on inclusive schooling environments.

**Staffing:** Vertus Middle will employ a skilled, collaborative team to provide individualized, high-impact support for students with disabilities. At the center of this work is the Specialized Services Coordinator, who will lead the special education program by managing IEP implementation, coordinating with the CSE, overseeing service providers (e.g., speech, audiology, nursing), training staff, and serving as the primary liaison with families.

Each grade level will have access to a certified Special Education Teacher, who will provide instruction and support through an ICT model and small-group pull-out services, as appropriate. These teachers may be assigned to general education classrooms, Learning Labs, or other instructional settings based on student needs and scheduling. They will collaborate closely with general educators to differentiate instruction, adapt curriculum, implement IEP goals, and monitor student progress. All teachers and service providers will receive secure digital access to

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<sup>20</sup> Friend & Cook, 2016; Murawski & Bernhardt, 2015

students' IEPs, with key accommodations and service requirements highlighted in planning tools and discussed during weekly instructional team meetings. A team of AIS staff and interventionists will support students within our RtI framework, delivering scaffolded, evidence-based interventions in ELA and math, including targeted academic support for students identified via i-Ready data or state assessment performance. All staff will be highly trained in special education practices, co-teaching models, and data-driven instruction. Together, our team will ensure that every student—regardless of need—receives the support necessary to succeed in an inclusive, high-expectation learning environment.

**Special and General Education Coordination:** Services for special populations will be delivered through a collaborative, inclusive approach that ensures support within the least restrictive environment. In the Vertus Middle ICT model, Special Education and General Education teachers work together daily to provide differentiated instruction within the general classroom. Special Education Teachers, General Educators, AIS staff, and the Assistant Principal will collaborate closely, using assessment data to tailor instruction and provide push-in or small-group pull-out support aligned with IEP goals. The RtI framework coordinates tiered academic supports, while ongoing communication among educators and families will ensure consistent, effective services. This integrated model will foster an inclusive environment where all students can succeed.

**Related Services:** Vertus Middle will provide a range of support services to address students' academic, social-emotional, and physical needs. In partnership with RCSD, the school will deliver related services such as counseling, speech and language therapy, audiology, and skilled nursing care, as mandated by students' IEPs. Services will be delivered primarily through push-in support and ICT, with pull-out services provided when necessary. Staff will build strong relationships with families through regular communication, biweekly check-ins, and home visits as needed, with Preceptors serving as key points of contact for student support and advocacy. Vertus Middle will also partner with local organizations and service agencies to support students' social-emotional health, career exploration, and secondary readiness with mentorship, and mental health support.

**Evaluation Process:** Vertus Middle will employ a rigorous, data-driven process to evaluate the program effectiveness. Student progress on IEP goals will be the primary indicator, with updates shared quarterly to ensure strong family partnerships. We will regularly analyze multiple data sources—including state and school assessments, coursework, and project-based work—to monitor academic growth and guide instructional adjustments. Our MTSS team will disaggregate data by subgroup to close achievement gaps and tailor interventions. We will also track progress on essential non-academic goals such as behavior, independence, and self-advocacy. Compliance with all federal and state special education regulations will be maintained through annual audits and reviews. Additionally, we will gather ongoing feedback from students, families, and staff via surveys to inform continuous improvement. This comprehensive approach guarantees that Vertus Middle's special education programs will effectively meet students' individualized needs and promote academic and lifelong success.

## **E. ASSESSMENT SYSTEM**

**Assessments:** Vertus Middle will employ a multi-tiered assessment system aligned with New York State standards and testing requirements (e.g., participation rates, students with disabilities accommodations, etc.) to evaluate academic progress at multiple levels. Diagnostic assessments,

such as baseline literacy and math screeners (e.g., the i-Ready), will be administered at the start of each year to identify student strengths and areas for growth. Formative assessments will occur regularly within classrooms and Learning Labs, embedded in daily instruction and lesson plans, allowing teachers to adjust teaching in real time. Interim assessments aligned to curriculum units and benchmark exams will provide data on student mastery and readiness for state assessments. Summative assessments, including quarterly grades and New York State Grades 7-8 assessments, will provide formal measures of student achievement and readiness for promotion to high school. The Edgenuity Learning Management System will support detailed tracking of student progress, providing real-time data to inform instructional adjustments and targeted supports.

**Social Emotional Assessment:** Vertus Middle will select and integrate social-emotional assessments (such as Panorama, DESSA, SAEBRS, or another validated tool) alongside academic measures to holistically support student success. Validated survey instruments will be administered quarterly to measure factors such as student engagement, sense of belonging, self-regulation, and stress levels. Additionally, behavioral data from reflection room visits, disciplinary incidents, attendance patterns, and classroom observations will be analyzed to identify emerging social-emotional needs and trends. Preceptors and mental health professionals will use this data to guide individualized coaching, restorative justice practices, and targeted social-emotional interventions. These assessments will be embedded in regular student check-ins, mentoring sessions, and goal-setting conferences, ensuring ongoing monitoring and real-time support tailored to each student's growth.

**Authentic, Embedded Assessments:** All assessments will be designed to be authentic and integral to instructional practice. Teachers will incorporate formative checks and data analysis as routine components of lesson delivery, supported by ongoing professional development focused on data-driven instruction. The assessment calendar will be carefully aligned with the school's 200-day calendar, allowing adequate time for administering, analyzing, and responding to assessments. The budget will allocate resources for licensed assessment tools, staff training, and data systems like Edgenuity, ensuring that assessment practices are sustainable and supported by qualified personnel, including the data analyst (currently employed by the high school) for state reporting and major data needs; and specialists in academic intervention and social-emotional learning. Staffing plans will clearly designate responsibilities for data review, intervention coordination, and progress monitoring to maximize the impact of assessment data.

**Assessment Selection and Creation:** The SLT will select academic assessments based on alignment with NY State standards, rigor, and validity, involving teachers and staff members in the vetting process. Social-emotional assessments will be chosen for their evidence base and relevance to the school's character education goals. Staff, including mental health professionals and Preceptors, will participate in reviewing and piloting tools to ensure appropriateness and cultural responsiveness. Families and students will be consulted through surveys and focus groups to refine the selection of social-emotional measures, ensuring that assessments reflect their lived experiences and needs.

**Assessment Calendar:** Vertus Middle will maintain a transparent annual assessment calendar that schedules diagnostic screeners at the start of the year, formative assessments weekly, interim benchmarks quarterly, and summative exams per state timelines. Social-emotional

surveys and behavioral data collection will occur quarterly, integrated with the school's mentoring cycle. This calendar will be reviewed annually with staff and posted for families, aligning assessment activities with curriculum pacing and professional development sessions.

The following table identifies Vertus Middle assessments.

Assessment	Purpose	Administration	Frequency
New York State Assessment	To evaluate student proficiency in ELA and math based on state standards; inform school accountability; determine student progress toward grade-level expectations; identify students for additional support or enrichment.	All students.	Annually in spring.
NYS Alternate Assessment (NYSAA) <i>As needed</i>	To assess students with the most significant cognitive disabilities in ELA, math, and science; aligned with NYS learning standards but adapted to individual ability levels; used for accountability and instructional planning.	Students with disabilities per IEP	Annually in spring.
New York State English as a Second Language Achievement Test (NYSESLAT)	To measure English language proficiency in speaking, listening, reading, and writing; used to determine ELL status and inform instructional services; monitors annual progress toward proficiency.	English Language Learners	Annually in spring.
i-Ready	To measure academic progress, learning growth, and placement; assess effectiveness of personalized learning models; identify trends and areas of concern; support instructional planning; standardize baseline and growth data in reading and math; suggest remediation or acceleration as needed.	All students.	Baseline at beginning of year. Two to three times per year.
Exit tickets	To inform differentiation to support mastery and completion, including Do Nows	All students	Daily
Formative and summative assessments, including Edgenuity quizzes, tests	To evaluate how much a student has learned and students' overall performance. Teachers are provided with rubrics, assessment guidelines, and reporting documentation to support the interpretation of student performance	All students	Ongoing: at the end of each unit and/or course

Regents exams	To aid with Federal and State accountability and graduation preparedness; to demonstrate knowledge and skills in ELA, math, science, and social studies as required by the State	8 <sup>th</sup> graders only take them if enrolled in a high school-level course approved for Regents credit.	As students are ready: August, January, and June
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**Valid and Reliable:** Vertus Middle will ensure validity and reliability by selecting state-approved and research-based assessment tools, regularly reviewing assessment data for consistency, and providing staff training on administration protocols. Benchmarking will occur through comparison to local district data, state assessment results, and national norms when available. Data audits and cross-checks will be conducted quarterly by our Assistant Principal to verify accuracy. Additionally, Vertus Middle will partner with external evaluators periodically to validate assessment processes and outcomes.

**Data Processes:** Assessment administration will follow standardized procedures, with clearly assigned roles for testing coordinators, teachers, and data staff. Data will be securely stored in the Edgenuity LMS and other encrypted systems compliant with FERPA regulations. The Director of Curriculum and Assessment, in conjunction with the Assistant Principal, will oversee data integrity and lead quarterly data review meetings with leadership and teaching staff to analyze trends and determine intervention needs. Data dashboards will provide accessible visualizations to inform decision-making in real time.

**Stakeholder Use of Data:** Teachers will use assessment data to tailor instruction, group students for targeted support, and monitor individual progress. Mental health and social work professionals will integrate behavioral and social-emotional data into individualized support plans and referrals. Administrators and the Board will utilize aggregated data to monitor school-wide performance, allocate resources, and set strategic goals. Families will receive regular, clear reports on student progress, with opportunities to engage in conferences and data discussions. Students will be supported in understanding their own data through coaching and goal-setting sessions to foster ownership of their learning and growth.

**Individual, Cohort, and Schoolwide Results:** Individual student data will guide personalized learning plans, interventions, and social-emotional supports. Cohort and subgroup analyses will help identify achievement gaps and inform professional development and resource allocation. Schoolwide data monitoring will align with the school's mission and Pillars, providing actionable insights for continuous improvement in academic achievement, character development, and school climate.

**Goal Setting:** Goal setting will be an integral part of Vertus Middle's culture of continuous improvement and student ownership. Students will work closely with their Preceptors to develop and regularly monitor ILPs, which include both academic and character development goals. These personalized plans will serve as living documents, guiding students in setting meaningful objectives, reflecting on progress, and adjusting their focus as needed throughout the school year. Teachers will engage in goal setting as part of their professional development and evaluation

cycle. Each teacher will establish goals aligned with student achievement data and schoolwide priorities. These goals will be revisited through ongoing coaching and data review sessions to ensure they remain relevant and impactful.

At the leadership level, administrators will use real-time data dashboards and Board feedback to identify annual priorities, monitor schoolwide progress, and inform strategic decision-making. This structured approach to goal setting ensures alignment across all levels of the organization, fostering a shared commitment to growth, accountability, and excellence.

**Informing Families and Students:** Vertus Middle families will receive quarterly formal reports that include academic grades and character benchmarks, supplemented by regular progress updates via email and the Family Portal. Student-led conferences will promote reflection and goal setting, while communication will be accessible in multiple languages and formats to meet the needs of our diverse families. We host at least three Family Nights each year, where we share each student's academic and social-emotional progress. Achieving 100% in-person participation—even if Preceptors must visit families at home—is one of our internal benchmark goals. Regular newsletters, community meetings, and updates through our school website will also keep families informed about overall school performance and key initiatives.

#### **F. PERFORMANCE, PROMOTION, AND GRADUATION STANDARDS**

**Policies and Standards for Promotion:** Vertus Middle's policies for grade-level promotion align with Section 100.4 of the Regulations of the Commissioner of Education and are designed to ensure that students meet both state learning standards and local academic expectations. Students in grades 7 and 8 will be expected to demonstrate satisfactory progress across core subjects—including English language arts, mathematics, science, and social studies—based on multiple measures such as classroom performance, teacher assessments, benchmark tests, and standardized exam results. Promotion decisions will consider academic performance, skill development, attendance, and overall readiness for the next grade. Students must meet established benchmarks across content areas unless otherwise specified in an IEP or 504 Plan. The promotion policy will be documented annually and shared with families through the school website and printed materials. In years when state assessment data is delayed, district-developed performance measures will guide placement and intervention decisions.

**Support for Students Not Meeting Promotion Standards:** Students identified as at risk of not meeting grade-level standards will receive timely and targeted academic intervention. Vertus Middle will follow the two-step identification process established by the New York State Education Department. First, students who score below state proficiency levels in ELA or mathematics will be flagged for possible intervention. Second, the school will evaluate multiple data points—including formative and benchmark assessments, NYSESLAT scores for ELLs, developmental reading assessments, and psychoeducational evaluations—to determine whether additional support is necessary.

Academic interventions will be tailored to each student's specific learning needs and may include small-group instruction, targeted pull-out sessions, or embedded support during regular class time. When appropriate, Vertus Middle will conduct diagnostic screenings to assess whether a disability is contributing to academic challenges.



Vertus Middle's 200-day year-round academic calendar provides built-in opportunities for remediation, enrichment, and extended learning time—ensuring that students have multiple pathways to meet promotion standards and stay on track for high school success. For students requiring AIS under Section 100.2(ee)(2)(i), the school may reduce instructional time in certain non-core areas to accommodate additional support, provided that:

- AIS supplements, rather than replaces, core instruction;
- Reductions in non-core subjects (e.g., world languages) are temporary, minimal, and approved by the school Principal;
- Instructional modifications do not compromise students' ability to meet graduation or promotion requirements;
- Families are notified in writing of any AIS-based instructional adjustments.

**Diploma:** Though Vertus Middle will serve grades 7–8 and not award high school diplomas, students who successfully complete the program and meet promotion criteria will receive a certificate of completion recognizing their readiness for high school and their accomplishments in academics, character development, and career exploration.

## **G. SCHOOL CULTURE AND CLIMATE**

**Vision of School Culture:** At Vertus Middle, our school culture will advance our mission to develop young men of character and academic success. It will be embedded in daily routines, practices, and relationships, anchored by three Pillars: Strong Relationships, Personalized Year-Round Academics, and Character Education. We believe true success blends rigorous academics with strong mentorship that builds resilience, empathy, and leadership. Every student will belong to a small learning team and have daily support from a full-time Preceptor who knows him well and champions his growth. Career Readiness programming will further enrich our culture through real-world experiences and soft-skill development. Weekly culture meetings, led by school leadership, will keep student climate and welfare front and center.

Our approach draws on proven strategies in *Teach Like a Champion 3.0*, training staff in practical techniques that create respectful, engaged classrooms. Character development is woven into daily life through seminars, service-learning, and coaching that emphasize courage, responsibility, and empathy. Discipline is restorative and relational, not punitive by default—students learn to repair harm through circles, peer conferencing, and reflection. A Reflection Room provides a structured reset so students can return to class ready to succeed. Serious misconduct will face swift, fair consequences, including a zero-tolerance policy for weapons, drugs, and violence. Our earned-uniform system, professional norms, and daily affirmations all build pride and maturity.

Staff receive extensive training in culture-building, behavior management, and restorative practices. Culture is monitored through regular surveys, pulse checks, climate reviews, and shared reflections to drive continuous improvement.

Elements of Vertus Middle's culture include:

- **Growth mindset:** We will value effort, resilience, and practice over innate ability.
- **Goal-setting and accountability:** Students will set academic and personal goals through their ILPs. Staff will set professional goals and be held accountable through performance evaluations.



- **Leadership:** Both students and staff will be expected to grow as leaders, take initiative, and positively influence their teams and communities.
- **Consistency in norms:** All Learning Labs will share the same routines and expectations, from how students request help to how they interact respectfully with adults and peers.
- **Restorative justice and behavioral supports for students with disabilities:** The school will work closely with the CSE to ensure appropriate supports, and all staff—including SPED-certified teachers and trained Preceptors—will use strategies tailored to behavioral needs, including de-escalation and trauma-informed practices.

Our vision is a school where every student is known, where discipline is grounded in care and purpose, and where the environment empowers young men to grow in intellect, character, and confidence. Culture will be the engine that drives every aspect of learning at Vertus Middle; results at our high school show it works.

**Research that Supports Culture and Discipline:** Vertus Middle’s school culture and discipline model is grounded in research-based, relational, and restorative practices that reduce exclusionary discipline and keep students engaged in learning. National research shows suspensions do not improve student outcomes and often deepen achievement gaps, especially for Black students and students with disabilities, who face disproportionately higher suspension rates. In Rochester, Black students are suspended at 2.5 times the rate of their white peers. Our model tackles these inequities head-on by providing non-exclusionary, relationship-focused alternatives like Pathways to Success, which keeps students in school with support and reflection rather than removing them from learning. Internal Vertus High data shows this works. Suspension rates decline over time, and behavior improves with proactive engagement. Student and staff surveys reflect strong perceptions of safety. Staff also report high safety and satisfaction. Discipline decisions will be thoughtful and data informed. Suspension decisions will be made by BIS staff, Assistant Principal, and Principal. Our discipline approach is data-driven, restorative, and focused on helping students learn from their choices.

**Responsibility:** Primary responsibility for culture and discipline rests with the CEO, Principal, and Assistant Principal, who oversee design, implementation, evaluation, and improvement. They lead weekly culture meetings to review climate, student welfare, and retention, ensuring the school stays aligned with its Pillars. Teachers and Preceptors implement cultural practices daily and serve as the frontline for relationship-building and behavior support. BIS staff and Preceptors manage behavioral responses, including the Reflection Room and Pathways to Success program. The SLT will monitor trends in suspensions, Reflection Room use, and other indicators, coordinate the Pathways to Success program, and help tailor supports and training for special populations, including students with IEPs.

Families and students help shape culture through regular feedback, leadership opportunities, and open communication with staff. All staff will participate in extensive professional development around school culture, contribute to and be evaluated on their alignment with Vertus Middle’s cultural expectations, be trained to recognize and respond to behaviors connected to disabilities, and work collectively to uphold shared norms and reinforce school-wide consistency in expectations and language. Students will help shape the school culture through leadership roles, goal setting, and active participation in Learning Teams. They will engage in feedback processes

through monthly surveys and restorative practices. Families will also serve as culture partners by offering annual feedback, providing ongoing input, and participating in conversations about culture to help strengthen home-school connections.

**Strategies to Develop and Sustain School Culture:** Vertus Middle will sustain a strong, supportive school culture through clear systems, daily practices, and continuous staff development. The school's tiered discipline framework and restorative supports will keep the focus on accountability and growth rather than removal from learning. Suspensions will remain a last resort, applied only for serious infractions and only after review with the student's Preceptor and school leaders to ensure fairness and consistency. A core element of this approach is the Pathways to Success initiative, Vertus Middle's formal Alternative to Suspension (ATS) program. This program provides students with frequent but non-violent behavioral challenges a structured, supportive way to reflect, reset, and rejoin learning—without being excluded from school. Students will have time to step away briefly, complete reflection assignments, receive coaching, and develop better strategies for success in the classroom.

Vertus Middle will use a robust data system to track key indicators such as ATS participation, time spent out of class, suspension rates, and repeat infractions. The SLT will review trends monthly, disaggregate results to monitor equity for students with disabilities and other subgroups, and adjust supports and staff training as needed.

Professional development will equip teachers, Preceptors, and support staff with concrete tools for prevention, de-escalation, restorative conversations, and effective re-entry strategies. Regular culture meetings will ensure alignment and shared accountability for maintaining a positive, orderly climate. Student, family, and staff surveys will supplement discipline data, capturing whether students feel safe, respected, and supported. These insights, along with logs and classroom observations, will ensure that culture and behavior practices stay aligned with Vertus Middle's mission and core Pillars. Together, these systems will create a learning environment where clear expectations, trusted relationships, and restorative supports help every student grow and stay connected to learning.

**Safe and Orderly School Environment:** Vertus Middle will ensure a safe, orderly learning environment through intentional design, clear expectations, and strong relationships. The school will blend traditional school culture—modeled after high-performing private schools—with a modern, tech-infused academic program. Physical and emotional safety will be prioritized, and all community members will work together to protect the learning environment. Expectations will be clear, fair, and consistently enforced, and equity will be promoted through inclusive practices. Our high staff-to-student ratios will support proactive supervision and early intervention, allowing us to watch carefully for safety threats and address safety and harassment concerns before they escalate. Preceptors and BIS staff will be visible throughout the day, serving as mentors and behavioral supports. Staff will be trained in *Teach Like a Champion 3.0* techniques to maintain engagement, consistency, and respectful communication.

The BIS will lead with empathy and fairness, reinforcing accountability and support. Each day will begin with the Vertus Creed—a shared affirmation of purpose—and character education will be woven into daily routines. Survey data from the high school confirms that students, families, and staff feel safe and supported, and Vertus Middle will build on this success to maintain strong

perceptions of physical safety, respectful behavior, and low rates of bullying. A shared Facilities & Athletics Director will maintain a detailed safety plan, lead annual trainings, and oversee building improvements such as anti-shatter window film. A School Resource Officer will provide additional campus security. Clear building rules outlined in *The Vertus Way* will protect students, staff, and property while promoting cleanliness and professionalism.

Finally, in alignment with NY's Dignity for All Students Act (The Dignity Act, or DASA), Vertus Middle seeks to provide students with a safe and supportive environment free from discrimination, intimidation, taunting, harassment, and bullying on school property, school buses and/or at school functions. Our CEO serves as our DASA Coordinator (or DAC), while our Principal is responsible for a safe, academically focused school culture free from harassment and discrimination. He works with staff, including experienced counselors, who possess an all-around understanding of the physical, emotional, cognitive, and social needs of our young men to ensure that the school has effective, consistent procedures documented in the Vertus Way and accompanied by strong staff training systems to provide a safe environment.

**Social-Emotional Development:** Vertus Middle will promote students' social-emotional development by anchoring the school day in strong adult-student relationships and character education. Each middle school student will be assigned to a small learning team, led by a Preceptor who will provide consistent mentorship, academic support, and behavior guidance. These Preceptors—available to students 24/7—will help students navigate adolescence with empathy, purpose, and support. Character education will include the Vertus Creed, structured SEL lessons, and goal setting through ILPs. Restorative practices such as circles, peer conferences, and daily affirmations will foster accountability, empathy, and inclusion while elevating student voice and addressing inequities.

Trauma-informed training will be provided to staff to support students impacted by adverse experiences and to nurture a culture of care. Surveys will be administered monthly and biannually to assess students' experiences with safety, relationships, and support. Data will be reviewed with students to brainstorm improvements collaboratively, giving them ownership over school climate and SEL-related improvements. Daily classroom visits, teacher surveys, and feedback from the SLT will further guide adjustments to ensure students are emotionally supported and actively engaged in a positive school environment.

**Behavior Management and Discipline for All Students:** The Vertus Middle discipline system will emphasize fairness, empathy, and high expectations through a continuum of tiered supports. Discipline will never be punitive by default, but rather an opportunity to repair harm and build relationships. *The Vertus Way* handbook will outline clear, consistent, developmentally appropriate expectations. Staff will teach and uphold the five school rules, reinforced daily through positive framing, practice, and feedback. Consequences will be tiered and may include restorative conversations, written reflections, temporary removal to the reflection room, loss of privileges, family conferences, and, when necessary, suspension or expulsion. Out-of-school suspensions will be reserved for serious incidents only.

In line with research showing the harm of exclusionary discipline, Vertus Middle will use its *Pathways to Success* program as an alternative to suspension, providing structured support to help students build better behavior skills while staying connected to school. For students with

disabilities, behavior will be addressed through a supportive, understanding lens. Each Learning Lab will include a SPED-certified teacher or AIS staff, and Preceptors will be trained to recognize triggers, de-escalate, and use restorative practices. Vertus Middle will work closely with families and the CSE to ensure IEP-aligned interventions are implemented and that all students have equitable access to a supportive learning environment.

**Monitor and Evaluate Efficacy:** Vertus Middle will evaluate its culture and discipline systems through a combination of surveys, observational data, and disaggregated behavioral analytics. Informal student surveys will be conducted organically with more comprehensive surveys administered biannually. Staff and family surveys will supplement this data annually. Topics will include safety, belonging, respect, emotional support, and fairness of disciplinary systems. The Assistant Principal, supported by the SLT, will analyze this data regularly to identify patterns, track progress toward cultural goals, and guide adjustments in practice or policy.

The school will also track detailed behavioral metrics: number and type of infractions, frequency and duration of reflection room visits, use of suspension and alternative-to-suspension interventions, and data disaggregated by subgroup to monitor for disproportionality. Data from classroom observations and teacher feedback will further guide professional development and targeted coaching. These ongoing monitoring practices will be part of Vertus Middle’s continuous improvement cycle.

## **H. SCHOOL SCHEDULE AND CALENDAR**

**Calendar:** Many of our students will enter below grade level, with significant skill gaps caused by chronic absenteeism, frequent school changes, and inconsistent engagement in traditional school settings. In direct response, Vertus Middle, unlike traditional schools in the district of location, will operate on a year-round calendar designed to break the cycle of learning loss and disengagement by providing consistent structure, strong daily relationships, and academic momentum.

<b>Quarter</b>	<b>Instructional Days</b>	<b>Federal Holidays</b>	<b>Teacher PD</b>
Q1	45	1	4
Q2	45	4	2
Q3	45	0	4
Q4	45	2	2
Summer	20	1	2 or 3 in June; 5 in Aug/Sep
Total days	200	9	19-20

The 2027–28 school year will begin on Wednesday, September 8, 2027, end on Friday, June 23, 2028, and include an additional 20 instructional days in the months of July and August, totaling 200 mandatory instructional days. The year will be divided into four academic quarters, with a mandatory summer session to prevent summer learning loss and keep students connected to school during the months when skill loss is most likely. Breaks and holidays will align with the RCSD calendar so families with children in other schools can coordinate schedules. Scheduled remote learning days during quarter transitions will maintain continuity for students while giving staff dedicated time to analyze student progress, adjust plans, and hold family conferences to keep parents engaged in their child’s success. All school staff will work a full-year schedule aligned

with Vertus Middle’s mission of personalized, relationship-based learning. In the first year, staff will begin work no later than July 28, 2027, providing five weeks of focused pre-opening planning and training before students arrive. In future years, staff will participate in 7-8 days of pre-opening professional development (2-3 in July (depending on the year), 5 in August/September) and 12 days of professional development during the school year. Teachers will participate in 19-20 full days of professional development throughout the year.

**Student Schedule:** (*Attachment 4a and b*) Vertus Middle’s daily schedule will be designed to ensure that all students, whether on grade level, at risk of academic failure, or exceeding expectations, receive the time, structure, and support they need to meet New York State’s middle-level learning standards and unit-of-study requirements while addressing the significant learning gaps and strengths students bring. While the building will open daily at 7:30 AM for breakfast, the instructional day runs from 8:00 AM to 3:00 PM, delivering approximately 345 instructional minutes (nearly six hours) of direct instruction (plus 30 minutes of advisory) each week — exceeding the State’s minimum daily instructional time for grades 7 and 8.

Each day will begin and end with a 15-minute Advisory period with a Preceptor, giving every student daily and consistent time to build relationships, check goals, and ensure readiness to learn. Students will move through seven structured periods:

- ELA and Math will be taught daily in extended blocks (60–75 minutes each), allowing students performing at grade level to engage in rich, standards-based instruction, students at risk of failure to access targeted small-group interventions and skill-building, and advanced learners to deepen their thinking through accelerated and complex tasks.
- Science and Social Studies will rotate daily, delivered through Learning Labs that blend teacher-led instruction with digital tools and projects, enabling all students to build content knowledge at their own pace and ability level.
- PE will be held three times per week, satisfying New York’s requirement for physical education every other day.
- Specials — including Art, Technology/Family and Consumer Sciences, Health, Music, and Library/Information Skills — will be offered twice per week on a rotating basis across quarters. This rotation ensures that students complete at least a half unit of Health, a half unit of Visual Arts, a half unit of Music, and the required time for Career and Technical Education. Library and information skills will be integrated through core classes, the extra Spanish block, and projects at a minimum of one period per week. Instruction is adapted to challenge advanced students while offering scaffolded supports to those who need it.
- World Language will be provided two or three times per week to ensure that students meet the requirement of one unit of study over grades 7 and 8.
- Project Lead the Way (PLTW) will be offered twice per week, giving students early exposure to hands-on STEM learning, supporting Career Development and Occupational Studies (CDOS) requirements.
- Seminar will meet twice per week, focusing on character development, study skills, literacy, workplace readiness, and goal setting through students’ ILPs.
- Learning Lab for Intervention/Enrichment, held twice weekly (Monday and Friday), is tailored to student need: students engage in remediation or extension activities, ensuring

personalized support to close learning gaps or accelerate progress. On-grade-level students receive reinforcement to maintain academic momentum.

Students will have 3-minute transitions between periods to maintain orderly movement and maximize learning time. When the instructional day ends at 3:00 PM, the building will remain open until 6:00 PM. Students may receive academic support, Pathways to Success (ATS) from 3:00-4:30 PM on Tuesday and/or Thursday. They may also participate in clubs and intramural sports such as chess, spoken word, music, video gaming, strength and conditioning, bowling, basketball, golf, and volleyball. These activities provide safe, structured opportunities for students to explore interests and build teamwork and leadership skills. Saturday School is held from 8:00 – 11:00 AM.

**Teacher Schedule:** (*Attachment 3b*) The teacher schedule at Vertus Middle will be intentionally designed to integrate the school’s mission of strong relationships, personalized academics, character development, and early career preparation. Core ELA and Math teachers will deliver direct, standards-based lessons in the teacher-led classroom, using high-quality adaptive tools to personalize learning and target skill gaps in literacy and numeracy. In addition to teaching core subjects, Learning Labs focus on Science, Social Studies, and selected electives, ensuring integrated supports for all students. Teacher teams will coordinate daily planning, co-teaching strategies, and individualized supports aligned with IEPs and 504 plans while students attend Special Rotation/Electives for 100 minutes/day; the time may also be used for collaboration, coaching, and continuous improvement. Professional development will be job-embedded and supported through regular observation and feedback. A weekly 1.5-hour staff meeting (each Wednesday afternoon) will support collaboration, professional development, and shared problem-solving. BIS and Preceptors will supervise lunch, providing teachers with a needed respite; teachers, BIS, and Preceptors will oversee transition periods to maintain a safe, positive school climate and build stronger student relationships throughout the day.

Period	Minutes	Activity
—	15	Planning
1	60	Teacher-Led Core (TLC)
2	60	Learning Lab / Seminar
3	70	Extended Core
4	20	Lunch
5	60	Specials / Planning and Collaboration
6	60	Learning Lab/ Planning and Collaboration
7	60	Advisory
—	16	Student Dismissal

Research from the National Center on Time & Learning shows that extended instructional time—especially in ELA and math—leads to improved outcomes for students who are behind academically.<sup>21</sup> Additionally, studies by the Learning Policy Institute highlight that daily advisory

<sup>21</sup> Farbman, D. A. (2015). *The case for improving and expanding time in school: A review of key research and practice*. National Center on Time & Learning.



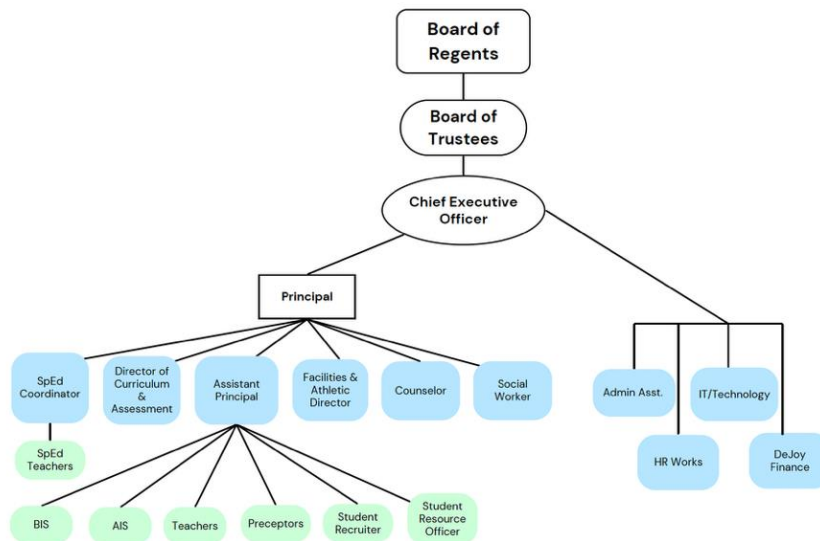
periods strengthen student-teacher relationships, which improves engagement, attendance, and academic performance.<sup>22</sup>

### III. ORGANIZATIONAL AND FISCAL PLAN

#### A. ORGANIZATIONAL STRUCTURE

##### Organizational Chart:

**Rationale for the Organizational Structure:**<sup>23</sup> Vertus Middle will build off the established and high-functioning organizational structure currently in place at Vertus High, ensuring a seamless extension of its effective systems and protocols to ensure successful implementation, evaluation, and improvement of its academic program and operations. As depicted in the organizational chart above, there will be clearly delineated roles for staff, management, and Board members. Vertus Middle will operate under the direction and control of the Board of Trustees, ultimately accountable to the authorizer (Board of Regents). The Board will oversee and delegate responsibility for daily operations to this CEO, who will then report directly to the Board monthly. The CEO will lead the SLT, consisting of the Principal, Assistant Principal, and the Director of Curriculum and Assessment. The SLT will lead the organization’s strategic direction, partnering with the Board to identify pathways for broader and deeper outcomes. SLT members will lead the school and present the vision, strategy, and mission-aligned goals.



The CEO will manage the Principal and the organizational areas such as technology, HR, and finance. The Principal will report to the CEO and oversee the Specialized Services Coordinator, Director of Curriculum & Assessment, Assistant Principal, Facilities & Athletics Director, Counselor, and Social Worker. The Specialized Services Coordinator will oversee the special

<sup>22</sup> Darling-Hammond, L., Flook, L., Cook-Harvey, C., Barron, B., & Osher, D. (2020). *Design principles for schools: Putting the science of learning and development into action*. Learning Policy Institute.

<sup>23</sup> All staff members on the org chart above will be in place throughout the term of the charter except for the Student Recruiter who will be with the school in 2027-28 and 2028-29. Beginning in 2028-29, the school will add more staff to accommodate 8<sup>th</sup> grade. Years 2029-30 through 2031-32, the school will have the same staffing plan.



education teachers. The Assistant Principal will manage and oversee the Behavioral Intervention Services (BIS) staff, AIS staff, teachers, Preceptors, Student Recruiter, and SRO.

Our organizational structure is designed to ensure a cost-effective launch, fulfill our mission, and implement our program. Some SLT members, such as the CEO, Director of Curriculum & Assessment, Principal, administrative assistance, etc., will be shared with Vertus High. However, the Assistant Principal's direct reports shown and described above will be hired solely for Vertus Middle (with the exception of the SRO who will be shared with the high school).

By sharing staff with the successful Vertus High, we can build off the strong systems and structures currently in place at the high school while tailoring staff roles to the unique needs of middle school students. The first year that we serve students (2027-28), we will have a total of 19.30 staff members. The next year we will nearly double our staff, primarily adding teachers, Preceptors, AIS staff, BIS staff, etc. to ensure robust academic and social-emotional support as enrollment grows.

## **B. BOARD OF TRUSTEES AND GOVERNANCE**

**Board Roles and Responsibilities:** The Board is committed to responsible governance, transparency, and accountability for public funds. As stewards of the school's mission, the Board will answer directly to the Board of Regents, the chartering authority for the school that grants the charter, sets terms and conditions, and has the power to renew, revoke, or terminate the charter, and ensure that Vertus Middle fulfills promises made to the families, students, and community. The roles and responsibilities of the Board include setting the mission and goals of the school, adopting an annual budget and ensuring adequate resources to implement the program, providing direction to the school's leader through adoption of clear policies and procedures, advocating for the best interests of the school, and holding school leaders accountable for performance. To carry out its duties, the Board will operate with three officers—Chair, Treasurer, and Secretary—and utilize a committee structure, including Finance, Accountability, Fundraising & Community Engagement, and Governance & Nominating. Each committee will oversee specific functions of the school.

- The **Finance committee** will engage with finance issues not brought to the Board as a whole. The Board Treasurer (and Committee Chair) and the Board Chair will review initial draft budgets and work with the CEO to develop full annual budgets for presentation to the Board.
- The **Accountability committee** will work to engage in meaningful consultation in accountability and improvement planning.
- The **Fundraising & Community Engagement** committee will drive the Board's critical fundraising activities. Members of this committee will oversee the development of fundraising goals, lead activities to meet these goals, hold the collective Board and individual members accountable for gift cultivation, and collaborate with administrators to engage the Board in regular and effective fundraising activities for the school.
- The **Governance & Nominating** committee is tasked with carrying on a continuous scan for potential Board members and training/onboard new Board members as they join.

Once per month the full Board will meet at the school with an agenda set by the Board officers with input from the school's CEO. The Board will monitor, evaluate, and, if necessary, terminate

the CEO, to whom operational responsibilities for the school are delegated. The CEO will provide regular reports to the Board regarding implementation of the academic program, status of the financial and operational health of the school, and progress towards goals. The Board will engage in ongoing communication with the Charter School Office, the administrative arm of the BOR, through submission of annual reports, participation in site visits, etc.

**Governance Practices:** The Vertus Middle Board will be the same as Vertus High and will ultimately consist of 13 Board members, though the by-laws require the Board to be not less than five and no greater than fifteen. The qualifications to be a Vertus Middle Board member include substantial expertise in a field relevant to Vertus Middle, commitment to the Vertus mission and program, willingness to advocate for the school, understanding of the difference between governance and management, and reliable contribution of time, expertise, connections, and/or financial resources to the school.

The Board currently has 11 members and is seeking to recruit two additional Board members: one with expertise in middle school academics and one with expertise in development. New Vertus Middle Board members will be recruited from a pool of local educational, business, and community leaders who commit to preparing leaders of character for the community and the workplace. Vertus Middle will utilize its Governance & Nominating committee, and these members will use existing relationships and networks to identify members that enhance the Board's ability to oversee and support the school. Governance & Nominating committee members hold responsibility for identifying desired skills and perspectives, coordinating outreach, interviewing prospective candidates, and presenting them to the full Board for consideration. Preference will be given to members with demonstrated leadership skills and substantial experience in public, private, and nonprofit management and governance. Once seated on the Board, the Governance & Nominating Committee will also manage their orientation, including providing new members with a Board handbook that includes the charter, Board-approved policies and procedures, and minutes from at least the last six meetings.

Securing members follows a structured process guided by BoardOnTrack's (BoT's) skills matrix. The matrix helps us determine where gaps exist so that we fill the Board with members with a diverse set of skills and expertise that meet the specific needs of the school and represent the community. We take time to ensure that each candidate is fully aware of their role and responsibilities. All candidates must attend a Board meeting, make a school visit, and participate in an interview with the full Board before they can be voted onto the Board. When practicable, existing Board members transition into other roles to support the training of new members. We are also adding non-board members to committees as a pathway to becoming Board members.

All Board members will have three-year terms, which will be staggered to foster stability and prevent sudden loss of institutional memory. The CEO will attend all Board meetings in a non-voting capacity to provide updates, but there are no ex-officio members. All Board meetings will be public, open, held in full compliance with the public meeting law (except when the Board goes into executive session for private matters, such as personnel and contract discussions), and parents and school staff will be encouraged to attend. The Board will include a public comment period in its monthly agenda to hear ideas and concerns. The Board's agenda will be posted at the school and on the school's website at least one week before each meeting, and the Board

Secretary will be responsible for the production and posting of minutes in the school's website as well. The Board will be overseeing two schools: Vertus Middle and Vertus High and will discuss each school at the regularly scheduled Board meetings, with agenda items dedicated to each school.

Through presentations given by a Kirsten Barclay—from Bond Schoeneck & King at monthly Board meetings and through participation in BoT training sessions (virtually and at our annual retreat), Board members engage in ongoing training. As a member of BoT, members benefit from an assortment of BoT resources, including training related to committee performance, school leader evaluation, strategic Board member recruitment, compliance with state open meeting laws, succession planning, and Board engagement.

**Expertise and Backgrounds:** The proposed Board for Vertus Middle is the existing Board of Vertus High. There are currently 11 members, but we are seeking two additional members to have a 13-member Board. We are seeking individuals with expertise in the areas of academics and development. For a detailed description of each Board member, please see *D. Applicant Group History and Capacity*; Board member resumes can be found in *Attachment 5a*.

- Spencer Ash serves as Municipal Attorney for the City of Rochester, offering over 20 years of legal expertise in government and civic affairs.
- Allison Bell, a seasoned financial planner and investment analyst, brings more than a decade of experience helping individuals and organizations achieve financial security.
- Sylvia David-West, a champion of diversity initiatives at L3Harris, combines over 15 years of technical and manufacturing leadership with a strong commitment to equity and inclusion in the workplace.
- Evan Gallina, Board Secretary, contributes over 9 years of experience in facilities management and commercial/industrial real estate, offering critical insight into infrastructure and operational planning.
- Dr. Calvin J. Gantt, a respected higher education leader at Monroe Community College, brings more than 25 years of experience in academic leadership, student success, and educational equity.
- Dekedrian Johnson is a governance, risk, and compliance analyst who actively volunteers to promote financial literacy within the local community, strengthening organizational accountability and financial empowerment.
- Michael Mandina, co-founder and Chairman of Optimax Systems, Inc., brings over 30 years of business leadership and workforce development experience. As the founder of an innovative workforce initiative, he connects schools with careers in advanced manufacturing, fueling talent pipelines across the region.
- John O'Connell, Treasurer of Vertus High, holds an MBA in Finance and brings over 20 years of executive-level experience in the music industry, spanning record labels, publishing, and digital distribution.
- Dr. David Paul, a black male entrepreneur, neurosurgeon, and educator, is an Assistant Professor of Neurosurgery at the University of Rochester and Director of Brain and Spine Trauma at Strong Memorial Hospital. He is deeply committed to increasing diversity in medicine and mentoring underrepresented students in healthcare.

- Victoria Van Voorhis, current Board President, is the founder of Second Avenue Learning, an ed-tech company acquired by ZSpace, Inc. With 17 years of experience in educational technology, she brings a visionary perspective to innovation in learning.
- John Wynn, a seasoned executive with over 30 years of experience across real estate, pharmaceuticals, infectious diseases, and community leadership, is a dedicated advocate for diversity, equity, and inclusion, actively leading initiatives to foster greater access and representation.

**Authority of the Board:** The Board will retain ultimate legal and fiduciary responsibility for the school and will govern the school through oversight of the CEO, to whom daily operational responsibilities for the school will be delegated. As part of the Board’s authority, the Board is responsible for setting the mission and goals of the school, adopting an annual budget and ensuring adequate resources to implement the program, providing direction to the school’s leader through adoption of clear policies and procedures, advocating for the best interests of the school, and holding school leaders accountable for performance. The Board will utilize a committee structure to carry out its duties and ensure effective oversight of the school. As part of the daily operational responsibilities of the school, the CEO will be responsible for accountability, academics, finances and operations, and authorizer relations, and will delegate responsibility to members of her team as appropriate (see *C. Management and Staffing* for more information).

**Holding School Management Accountable:** As noted above, the Board oversees the CEO and delegates responsibility for daily operations to the CEO, who then reports directly to the Board. The CEO, Principal, and outsourced accounting firm, DeJoy & Co., will report to the Board monthly using a “Month at a Glance” and a Board statistics report to share academic, operational, and financial updates. This will provide the Board with the information needed to oversee the school’s program and finances to sustain focus on the school’s goals as well as on the promises the school has made to its authorizer and its families. Data collected presents the Board with the information needed to provide external accountability and internal oversight and for leaders to affirm that the school achieves its mission. To ensure that key assessments (e.g., i-Ready, NYS exams) are included on the Board’s meeting agenda when appropriate, an annual reporting calendar will be included in the Board’s toolkit. This calendar is designed to facilitate year-to-year comparisons as well as the easy identification and monitoring of trends.

The success of Vertus Middle will be judged based on how it succeeds in making progress toward its mission. A clear system based on how the KDEs/Pillars, Organizational Values, and Benchmark Indicators provides the framework for evaluation of all aspects of the school. Finally, the Board conducts a formal evaluation of the CEO using the nationally recognized BoT evaluation tool.

**Principles and Practices of Opportunity & Access:** Given the student population that Vertus Middle seeks to serve, Board members are deeply invested in the principles and practices of opportunity and access in all aspects of their work. As described in the job description for Board membership, Board members “recruit and orient new Board members and assess Board performance.” Key to that is 1) defining Board membership needs in terms of skill, experience, and diversity; and 2) promoting diversity, equity, and inclusion by recruiting and selecting new Board members from a variety of backgrounds, paying particular attention to ensure the Board represents the community that it serves. When it comes to the academic and social-emotional

supports for students and the community we seek to serve, this, also, is fully framed in the principles and practices of opportunity and access. As our mission states, we seek to prepare leaders of character for the community and the workplace, and the student population that we enroll are typically young men who are underserved and at-risk of not graduating from high school. Thus, we embed opportunity and access into all aspects of our application, particularly our academic and social-emotional programming to ensure the young men are prepared and equipped to continue in their trajectory of growth and achievement.

**Training and Supports:** Given that the Board is currently an operating and high-functioning Board, the Board is already regularly engaged in training and supports to ensure effective oversight of the charter school. The Board will continue to retain the services of Kirsten Barclay—from Bond Schoeneck & King—to provide training at monthly Board meetings. Kirsten Barclay, a former educator turned lawyer, brings extensive knowledge and expertise about both education and legal matters. Her training and support have been invaluable to our Board.

Additionally, Vertus will continue utilizing BoT to allow members to participate in training sessions. BoT is a well-regarded, nationally recognized, and highly sought-after Board training organization that provides numerous training opportunities and tools to Boards across the country. As a member of BoT, members benefit from an assortment of BoT resources, including training related to committee performance, school leader evaluation, strategic Board member recruitment, compliance with state open meeting laws, succession planning, and Board engagement. Thus far, both Kirsten Barclay and BoT have been highly instrumental in supporting our Board’s ability to meet our established professional learning goals.

**Evaluating Board Capacity:** The Board will utilize BoT’s skills matrix to evaluate our capacity and identify gaps so that we fill the Board with members with a diverse set of skills and expertise that meet the specific needs of the school and represent the community. We have been utilizing this matrix for several years, and it has aided us in our ability to stay aware of our needs as a Board and recruit high-quality individuals in our area of established need.

**Applicant Group Supports:** The Board is already regularly undergoing training to ensure familiarity with effective Board governance practices, applicable laws, Board of Regents expectations, the dichotomy between governance and management, and other areas integral to the operation of a high-performing charter school Board of Trustees. Each year the Board engages in an annual retreat in September. As part of the retreat, after discussion with school leaders, the Board updates its strategic plan to codify Board responsibilities and systems in addition to identifying strategic priorities for the Board.

### **C. MANAGEMENT AND STAFFING**

#### **Staffing Table:**

<b>Proposed Staffing Chart</b>						
<b>Positions</b>	<b>Avg. Starting Salary</b>	<b>FTE</b>				
		<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Chief Executive Officer (CEO)	\$41,000	0.20	0.33	0.33	0.33	0.33
Director of Curriculum & Assmt.	\$20,000	0.20	0.33	0.33	0.33	0.33
Principal	\$23,500	0.20	0.33	0.33	0.33	0.33

Assistant Principal	\$65,000	1.0	1.0	1.0	1.0	1.0
Administrative Assistant	\$9,200	0.20	0.33	0.33	0.33	0.33
IT/Technology	\$51,500	1.0	1.0	1.0	1.0	1.0
Student Resource Officer	\$11,750	0.20	0.33	0.33	0.33	0.33
Facilities & Athletic Director	\$20,600	0.20	0.33	0.33	0.33	0.33
Student Recruiter (part-time)	\$22,500	0.50	0.50			
Behavioral Intervention Services	\$45,000	2.0	4.0	4.0	4.0	4.0
Teachers	\$50,000	5.0	10.0	10.0	10.0	10.0
Preceptors	\$45,000	5.0	10.0	10.0	10.0	10.0
Special Education Teachers	\$52,000	1.0	2.0	2.0	2.0	2.0
Specialized Services Coordinator	\$15,000	0.20	0.33	0.33	0.33	0.33
Academic Intervention Services	\$40,000	4.0	4.0	4.0	4.0	4.0
Counselor	\$12,500	0.33	0.33	0.33	0.33	0.33
Social Worker	\$12,000	0.33	1.0	1.0	1.0	1.0
<b>Total Staffing</b>		<b>19.30</b>	<b>35.48</b>	<b>35.65</b>	<b>35.65</b>	<b>35.65</b>

**Staffing Plan:** Vertus Middle will begin serving 95 7<sup>th</sup> grade students with 19.30 FTEs. In 2028-29, we will add 8<sup>th</sup> grade and serve a total of 190 students; that year we will nearly double our staff members with 35.48 FTEs. As demonstrated by the staffing chart, many of our staff members will be shared with the existing high school; this will ensure continuity of programming and enable us to meet our mission and fulfill our key design elements.

The average starting salary is the year 1 salary as calculated within the budget for all shared employees. For non-shared employees, the average starting salary is calculated on the pre-opening year salary.

The Assistant Principal will lead the day-to-day operations of the middle school. The Assistant Principal will also be responsible for evaluating and supervising staff, providing job-embedded professional development (in collaboration with members of the SLT), ensuring systems and policies are adhered to, creating and maintaining a positive student and staff culture, among others. The Assistant Principal will oversee teachers, Preceptors, AIS staff, BIS staff, and the student recruiter, as depicted in the organizational chart.

The staffing plan aligns with our key design elements, particularly the strong relationships pillar, as we will utilize Preceptors in equal numbers to teachers to support students, mentor students, and build lasting relationships. Furthermore, with the addition of BIS staff, AIS staff, a counselor, and a social worker, we will be able to meet our mission and serve our projected student population of young men potentially at-risk of not graduating. These added layers of structured, responsive support will enable the school to quickly close the achievement gap and intentionally assist students who are often underserved. Ultimately, this staffing plan ensures that we will have a student-to-staff ratio no greater than 6:1, which will allow the school to achieve our mission and goals.

**School Leader Roles/Responsibilities:** The CEO will be the school leader and will be responsible for the overall success of Vertus Middle; the CEO will report to the Board. As the chief leader of the school, the will CEO set the vision, ensure strong organizational health, drive academic



achievement, develop leadership capacity, and sustain operational and financial strength. The CEO will lead all aspects of the school's academic, character, operational, financial, and external engagement strategies to fulfill the mission and meet charter and accountability obligations. Key responsibilities will include organizational leadership (e.g., leading strategic planning and continuous improvement efforts for the school; fostering a safe, orderly, and inclusive learning environment); staff management & talent development (supervising the hiring, coaching, evaluation, and termination of staff members; providing regular observation and feedback to direct reports, etc.); academic program leadership (implementing the school's educational program with fidelity; utilizing data to improve instruction); family & community engagement (facilitating active parent, community, and partner involvement; serving as the primary liaison to NYSED); finance & budget management (overseeing budgeting and financial management with accounting firm; ensuring compliance with financial policies); operations oversight (ensuring smooth execution of school functions; supporting systems for student enrollment, etc.); external reporting & compliance (making formal reports to the Board; monitoring compliance); and evaluation, reporting, and resource management (evaluating school programs; tracking and monitoring progress). A full job description can be found in *Attachment 8a*.

Desired qualifications include a master's degree in education, administration, or related field (required); New York State School Building Leader (SBL) or School District Leader (SDL) certification (preferred); 7-10+ years of leadership experience in an educational setting, preferably charter or urban education; proven track record of success in improving student achievement and staff performance; strong experience managing high-performing teams, operations, and budgets; deep understanding of academic accountability systems and data-driven instruction; and demonstrated commitment to the success of historically underserved students and families.

**School Leader:** Julie Locey (*see Attachment 8b for full resume*) will be the leader and CEO of Vertus Middle. She currently holds this role at Vertus High (since July 2020) and will expand her role to include overseeing the middle school. Locey is an experienced educator and administrator based in Rochester. She holds a Bachelor of Arts in History with Elementary Education Certification from SUNY Geneseo, a Master's in Secondary Education-Social Studies from SUNY Brockport, and an Administrative Certification from the University of Rochester. Prior to becoming the CEO, she was the Principal at Vertus High from September 2017 to June 2020, where she managed teacher training, curriculum development, and academic performance oversight. Locey also worked as the Special Education Coordinator/Director of Academics at Vertus High from May 2016 to August 2017. From July 2006 to July 2015, she was the Principal at Bishop Kearney High School, where she managed school operations and promoted high academic standards. Locey held various positions at Bishop Kearney High School, including Vice Principal for Student Affairs and Assistant Principal, along with teaching roles at Holy Cross School and Charter School of Science and Technology. Throughout her career, she has emphasized professional development, teacher evaluation, and academic program management to enhance student outcomes.

**Management Roles and Responsibilities:** The CEO will develop and directly supervise key administrators who oversee the education program, school operations, and finance. As denoted in the org chart, the CEO will oversee the Principal, who will then oversee a team of leaders

responsible for implementing the academic program and some operational elements (e.g. the Facilities & Athletics Director will report to the Principal and be responsible for overseeing food service and transportation). Other operational and financial aspects will be overseen by the CEO, who will utilize outside vendors for finance (DeJoy & Co.) and human resources (HR Works); the CEO will also oversee an IT/technology specialist and the administrative assistant.

The Principal's role/responsibilities will include ensuring the school runs seamlessly every day, proactively problem-solving where needed; in partnership with the CEO, implementing the campus-wide strategy that supports the academic and cultural vision of the schools; playing a leadership role in developing the school's strategic annual plan and academic and cultural trajectory; supporting the Assistant Principal in hiring, managing, coaching, and developing school academic team members and school support staff; serving as "admin on duty" in the absence of the CEO and during coverage of athletic events or other extracurricular activities; overseeing the planning and implementation of staff professional development days; and ensuring alignment with the school vision, mission, and strategic outcomes.

The Principal will be supported by 4 key team members: a Director of Curriculum & Assessment, an Assistant Principal, a Facilities & Athletic Director, and a Specialized Services Coordinator.

- The **Director of Curriculum & Assessment** will lead the selection and development of curriculum and assessments for the middle school. This individual also will provide more targeted coaching and development, in collaboration with the Assistant Principal, to teachers needing additional assistance. The Director of Curriculum & Assessment will lead some professional development sessions (depending on the topic), ensuring the curriculum is intentionally implemented. Further, the Director of Curriculum & Assessment will analyze data, along with the Assistant Principal, to determine whether adjustments to the curriculum or supplementary programs and resources need to be made.
- The **Assistant Principal** will oversee the implementation of high-quality instruction, teacher development, and teacher evaluation. The Assistant Principal will ensure that the middle school staff and team members are supported to provide our students with a positive learning environment. The Assistant Principal will be supported by the CEO, Principal, and Director of Curriculum & Assessment; however, the Assistant Principal will be assigned to the middle school solely and not shared with the high school.
- The **Facilities & Athletic Director** will be responsible for facilities, supplies, building security and maintenance, food service, and transportation. This individual ensures the facility is well-maintained, in good repair, and that students arrive to a clean, welcoming environment. This individual also manages the relationship with the RCD transportation and food services departments, as the RCD provides transportation and food service to the school, ensuring that all students in need of bussing or food services receive their appropriate services.
- Finally, the **Specialized Services Coordinator** will be responsible for special populations. The Coordinator will oversee a team of special education teachers and facilitate the related services provided to students per their IEPs. Additionally, this individual will coordinate with the CSE and ensure compliance of all records and documents. See below for more info.

**Management and Staffing Plans for Serving Students with Disabilities and ELLs:** The Specialized Services Coordinator will report to the Principal; the Coordinator will oversee Special Education,

Section 504, and ELLs—as well as staff and students—to ensure that we provide high-quality services to our special populations in compliance with all legal requirements. The Specialized Services Coordinator will also manage student records, develop appropriate curriculum and training, ensure confidentiality, and administer New York State assessments as needed. Ensuring all these are accomplished will guarantee student achievement. The Specialized Services Coordinator will be supported by a team of two special education teachers, who will be responsible for providing instruction to students in alignment with their specific IEPs or ELL plans. We anticipate serving approximately 25% of students with disabilities and 12% ELLs. Accordingly, employing two special education teachers will allow for a case load of no more than 15 students per special education teacher. Given the limited number of ELL students, they will likely receive services from the ENL teacher at the high school or receive support from the foreign language teacher. Should our enrollment indicate a need for a dedicated ENL middle school teacher, we will adjust our staffing plans accordingly. Please see section *D. Special Populations and Related Services* and *Attachment 13* for a complete description of how the school will implement its special education and ESL programs.

**Recruiting and Retaining High Quality Teachers:** To identify top quality candidates who meet our standards and qualifications, Vertus Middle will conduct an extensive recruitment process to ensure that the school has the best pool of candidates from which to select. The school will recruit locally, nationally, and continuously. The leaders and Board will use their networks of national and regional contacts to scout for excellent staff who are passionate about working with at-risk students and want to be part of a nationally recognized innovative school model. In the first year, when the school has relatively few staff and is not yet serving students, significant recruitment for teaching staff, Preceptors, etc., will be done using a “headhunting” model; that is, finding talented individuals who can be successful in the role and recruiting them individually. As more staff are needed, the school will shift more resources into national advertising. Vertus Middle recognizes that it will need to continuously recruit to ensure it has a pipeline of highly effective staff, particularly for hard-to-fill subjects, such as special education. As such, we will be constantly recruiting, attending college recruitment fairs, posting roles nationally, etc.

Once recruited, Vertus Middle will implement a rigorous hiring process to identify team members who share a commitment to our students and school mission. Depending on the exact role, applicants will go through a multi-step process that includes an initial phone screen, committee interview, tour of the high school (and middle school once operational), and either a lesson presentation or job-related performance task. Applicants will also be allowed to shadow a high school staff member for two hours, who will then share feedback about the applicant’s interaction with staff and students. References will be completed before offers are made, and background checks will be completed before a start date. All staff hired at the school will all meet the following standards:

- A passionate belief that children in poverty deserve the same quality schools as affluent children, and that all children can achieve at high levels
- Love of teenagers, especially the ones who struggle; ability to work with a wide range of students from the inner city; demonstrated commitment to social justice and sympathy for the underdog; interest in an all-male school
- Belief in the value of character (for both adults and students)

- Self-starters; independent thinkers; willing to take risks; not stopped by fear; eager to innovate; creative thinkers
- Demonstrated record of accomplishment, including examples of overcoming challenges and setbacks
- Love of problem solving with other adults; willingness to ask for help and to accept feedback
- A growth mindset that values hard work over natural ability
- Willingness to work hard and do what it takes for students to succeed

While we intend to recruit locally and nationally, the school model is specifically built to provide career ladders and career opportunities for staff that are more like those in organizations outside education than those in typical K-12 schools. The organizational structure of the school creates small teams in which leadership can emerge and be nurtured, and professional development will be specifically designed to move staff into the next level job. This will build organizational capacity for Vertus Middle. By internally developing staff for higher levels of responsibility, we will be less dependent on the external labor market. Staff members can begin as Preceptors, a role that does not require a teacher certificate, and we will support them in gaining their certification and eventually growing in their careers to leadership positions. Many of the existing leaders, such as the Principal, were hired originally as Preceptors and advanced their careers through the support provided by Vertus High to become school leaders. We believe that by creating a culture of internal growth and promotion, some of the human resource challenges that many schools often face will be mitigated.

Vertus Middle believes in retaining high-performing staff, including those who have demonstrated the ability to improve student outcomes (such as attendance rates, academic advancement, and character growth). Retention will be prioritized by providing effective leadership, ongoing professional development, a collaborative and supportive work environment (including a “complaints-to-action steps” approach to staff feedback that encourages and empowers staff to drive changes around identified problems), a positive school culture, high levels of collective decision-making, and cross-team working groups. Every Vertus Middle employee will have an opportunity to meet with the Assistant Principal to share concerns, and the Assistant Principal will always stay alert to attrition risks. During mid-year and annual evaluations, employees will be asked about job satisfaction and aspirations for increased responsibility or additional roles. Staff members with performance concerns will be identified by the Assistant Principal and Director of Curriculum & Assessment. Depending on the concern, they will be given verbal and written warnings, as well as stepped-up coaching and supervision to help them improve. If these steps do not result in improvement (or for more serious shortcomings), the staff member will be put on a time-limited written performance plan. Staff who fail to improve as described in the plan will be terminated. The school will also make immediate terminations in the event of significant failures to follow important policies or actions that put our students or school community at risk.

Although Vertus Middle will offer competitive salaries and benefits, the primary factor in attracting and retaining effective staff will be the professional community and the opportunity to work in an innovative school that is closing the achievement gap. The school will offer standard health benefits as well as match up to 4% of salaries for a retirement savings plan. Salaries will

be determined by the CEO based on assessment of expertise and demonstrable impact on student achievement, as well as consideration of resources available. The proposed budget includes a 3% annual increase in salaries, which will be set by the Board each year based on financial conditions. The budget funds a performance-based bonus program, which employees must earn through their performance.

**Promoting Opportunity in Educational Leadership (Q.8 and 9):** Given our mission and our proposed student population, we believe strongly in providing individuals from historically underrepresented communities with opportunities to grow and become educational leaders, and we believe strongly in hiring a teaching staff that reflects our student population. Vertus Middle will raise leaders internally and/or hire very carefully after an extensive vetting process in which we look for skills, fit, as well as a growth mindset. Staff members within the school will be encouraged to grow in their personal development, take on leadership roles, and advance their careers while staying at our school. Many leaders at Vertus High were originally hired as Preceptors. Vertus High provided tuition reimbursement so these individuals could pursue their NYS teacher certification and advance in their careers. Vertus Middle intends to do the same.

The diversity of our team is essential, and we are committed to diversity and inclusion throughout our school to ensure a wide range of experiences, perspectives, and skills to provide better solutions, drive innovation and creativity, and enhance decision making. Diversity is a mission imperative, and we will continuously focus on creating a culture of inclusion that values each individual and promotes collaboration and fairness. As such, Vertus Middle is committed to

- Securing a high-performing workforce drawn from diverse locations and backgrounds.
- Creating a culture that encourages collaboration, flexibility, and fairness to enable individuals to contribute to their full potential, feel valued, and supported.
- Making diversity and inclusion one of our strategic priorities, through continued leadership commitment, accountability, and total workforce engagement.

Ensuring a diverse and inclusive workforce will enable our school to be more responsive to our students and better equipped to fulfill our mission. Achieving diversity and inclusion at our school will be a team effort and we expect and will encourage employees to contribute to this goal. Together, we will create a working environment that offers every individual the opportunity to attain professional goals and contribute to accomplishing our mission.

#### **C.1. COMPREHENSIVE MANAGEMENT SERVICE PROVIDERS – Not applicable**

#### **C.2. PARTNER ORGANIZATIONS– Not applicable**

#### **C.3. NETWORKED SCHOOLS – Not applicable**

### **D. STAFF SUPERVISION AND DEVELOPMENT**

**Instructional Leadership Roles:** The school will utilize a SLT consisting of the CEO, Principal, Director of Curriculum & Assessment, and Assistant Principal to distribute key responsibilities. The CEO will ultimately be responsible for the quality of instruction at the school and will work collaboratively with the members of the SLT to provide instructional leadership to teachers and staff members. Given the distributed leadership model, the CEO will delegate teacher supervision, support, and professional development to the Assistant Principal at the middle school. The

Assistant Principal will observe his/her teachers on a regular basis, conduct formal and informal evaluations, and ensure teachers are growing in their practice by supporting and helping them achieve their personal and professional goals, as described in evaluation above. The SLT will meet regularly to analyze data and assess areas of weakness to determine support and professional development needs. The Assistant Principal, then, will implement the professional development (with the support of the SLT) and ensure that the school continues to grow and increase student achievement.

**Professional Development Plan:** At Vertus Middle, we believe in the importance of continuously developing ourselves, our staff, and our Board members. To develop administrators, we will attend national conferences and participate in the New York State Charter Schools Association (NYSCSA) leadership meetings. These conferences and meetings provide an opportunity to network with other leaders engaged in the same work and learn from one another. Beyond the conferences and NYSCSA meetings, the SLT will be expected to continuously grow and develop, in alignment with the standards we hold for our students and staff. More specifically, continuous development and growth is one of the organizational values and will be included in the mid-year and end-of-year performance conversations.

To develop teachers and other staff, we will provide our teachers, Preceptors, AIS staff, BIS staff, among others, with extensive professional development and coaching. Our philosophy is that development must be continual and ongoing for all staff; it is not an event but a process. Professional development will be job-embedded and delivered throughout the year. However, we will also provide significant training prior to the start of the school year. Our first-year school calendar includes 7 days of professional development prior to opening (five at the end of August 2027 and two in July 2028). In subsequent years, we will provide 7-8 days of pre-opening professional development and 12 days of professional development during the school year. Teachers will participate in 19-20 full days of professional development throughout the year. See topics to be addressed below.

To develop teachers and staff members' expertise (particularly those new to teaching), we have designed a professional development plan that will ensure all teachers and staff are ready to serve our students on day one and throughout the year. During the summer, we will provide training to ensure we are able to implement our key design elements and meet our mission. More specifically, we will provide training focused on the following areas:

**Literacy and math focus:** The school will focus intensively on literacy and math, as evidenced by our additional blocks of ELA and math in the school schedule. We will provide training on the curricula we choose, as well as the intervention programs, to ensure all teachers are prepared and ready to implement our chosen curricula and resources.

**Blended learning:** Vertus Middle administrators, teachers, and Preceptors will receive extensive training and support from Edgenuity. The quality of professional development support was a significant factor in the school's preliminary choice of Edgenuity as on-line lesson provider. Edgenuity's professional development staff is expert in training educators to use its on-line lessons, digital tools, and on-line Learning Management System, as well as in supporting educators who are implementing a blended learning system.



**School Culture:** For Vertus Middle to be successful, all staff will have to work together to ensure a strong, coordinated approach to school culture. This will include instruction and practice in using affective speech, working with students who may be volatile or violent, have learning disabilities, or have limited English proficiency, effective ways to enforce the dress code and discipline policy, and use of restorative justice practices. Preceptors and teachers will have additional instruction and practice as needed, including training in restorative justice.

**Student Engagement:** As articulated in *C. Instruction*, we will seek to ensure strong student engagement. Accordingly, we will provide targeted professional development to all staff members to develop the skills they will need to be effective educators and actively engage students in their own learning. We will provide significant practice on how to actively engage students so that Vertus Middle educators become fluent in a set of standard engagement techniques for teaching.

**Character education:** Preceptors will receive targeted training in implementing the Seminar curriculum. In this training, led by the SLT, Preceptors will learn how to work with students to develop, monitor, and revise ILPs, help students set ambitious yet achievable goals, and develop strategies for getting back on track. They will also receive training on how to teach the Seminar curriculum, grade papers, projects, and presentations, and give students feedback. Preceptors will receive on-going leadership training aimed at building their skills so that they can advance in their careers and take on leadership roles within the school.

**Special Populations:** Specific professional development will be provided prior to the school year to hone teachers' ability to interpret and use IEPs in the development of lessons and intervention programs. Ongoing training will be provided throughout the year by the Specialized Services Coordinator to ensure our special populations of students are well served and thriving, and that all federal and state requirements are met as it pertains to serving students with disabilities and ELLs. These topics will be revisited throughout the school year. During the school year, we will hold all-staff professional development approximately once per month in either whole or half day increments based on the school calendar; these will be held on the remote learning days. These professional development days will be 3-6 hours in length where all staff attend; we will recognize and celebrate our staff members for their growth and achievement; offer development and the opportunity to practice skills, brainstorm, and problem solve; and review procedures and analyze data, among other topics. Further, one professional development day per quarter will be a data day where we conduct a deeper dive into the data, review student work, conduct item analysis, etc., and create action plans for improvement. We will expect all staff members at the school to be well-versed in analyzing and using data to continuously drive improvement.

Additionally, new staff will begin in the summer session and will be given the opportunity to learn their role while shadowing an individual who holds their assigned role. This job-embedded opportunity will provide significant professional development for them and provide a safe opportunity to learn the job while not holding responsibility for all of the job requirements. In essence, new staff will receive five weeks of job-embedded professional development prior to being responsible for the role. Further, we will utilize a mentor system where a mentor is paired with staff members who are new to the school and/or new to teaching. Mentors will regularly meet with mentees to offer support, advice, and resources to ensure each new staff member's

success.

Much of our professional development will be provided by our SLT; however, we will utilize outside vendors specific areas (such as the curricula). We will use outside vendors selectively, working only with those whose programs have achieved proven results in schools such as ours and who can support sustained training that is fully aligned with our goals for our students. To identify topics and diverse needs for PD, data will be collected during daily classroom visits, from teacher surveys, and through the regular analysis of data. School leadership will utilize the information collected to determine professional development offerings and provide teachers differentiated and discrete opportunities to improve in the areas they so desire. Finally, we will provide our staff opportunities to attend professional development outside of the school environment for both academic and social-emotional topics, should the professional development offerings at our school not meet their specific needs.

**Delivery and Differentiation:** Professional development will be overseen by the Assistant Principal; however, any qualified leader at Vertus Middle could deliver professional development depending on the topic addressed or skill being taught. We will utilize a variety of staff to deliver professional development to allow them to continuously grow in their leadership development. Given that it will be a new school, we will provide all teachers and staff with training specific to our curricula, our desired school culture, special populations, and how to implement our specific model as described above. It is essential that as we build the middle school, all staff members have a clear and aligned understanding. Also, new staff members, as noted above, will begin in the summer session and be provided specific training for their assigned role for five weeks. During the school year, there will be opportunities for more differentiated professional development. Teachers will receive targeted professional development in their subject areas throughout the year to continue developing in their knowledge of their content area. Additionally, for staff members such as AIS or BIS, we will provide specific training aligned to their roles, such as training for BIS in restorative practices. As the school grows and staff with varying levels of expertise are hired and retained, we will seek to further differentiate and provide the training they need most.

**Implementation and Evaluation:** All professional development offerings will have specific goals for what participants will learn and/or be able to do, accompanied by ways that goal attainment will be measured. Professional development will be evaluated based on the extent to which they have attained their stated goals. All professional development will include a participant survey to gauge participants' satisfaction with the program and their own assessment of what they gained and accomplished. In addition, wherever possible, there will be a specific assessment of participants' skills and knowledge, not only directly after the session but also over time. These reviews will reveal the strengths and weaknesses in programs and inform the review and improvement. Most importantly, professional development should lead to student results. The entire school model is based on a clear set of goals. In areas where the school does not achieve its goals, professional development offerings will be reviewed and refined until the desired result is reached. Additionally, to address lagging skills for staff, we will offer a Thursday Morning Practice Clinic to allow staff members an opportunity to hone their skills in the specific area.

**Professional Climate:** Vertus Middle will do our very best to hire staff who are committed to serving at-risk males in an innovative school environment, and who are willing to work extremely

hard to ensure all students are successful. Everything the school does and everything staff members do will be expected to be purposeful. If the purpose is not clear, it will be re-examined. Regular weekly staff meetings will provide a forum for all staff to raise questions about school policies, systems, and approaches. The leaders are experienced in creating staff cultures in which talented people collaborate to solve problems of practice, and will build structures, including regular meetings, in which collaboration occurs, as indicated by the successful professional climate at Vertus High. Administrators will survey staff regularly and will review results with all staff to solicit and implement ideas for improvement. The CEO and Board are mindful that in a school like Vertus Middle, staff burnout is a risk. The year-round calendar is unusual and will lead to more days of work than educators typically experience. On the other hand, the school calendar provides more than 30 paid days off in addition to holidays and leave, which is far more than most members of the professional workforce receive. School leaders and the Board will monitor staff retention carefully to determine if staff the school would prefer to retain are leaving, and if so, what can be done to improve retention.

**Teacher Planning and Collaboration:** Vertus Middle will place great emphasis on collaboration among all staff members, since we know that our students will need consistency. Collaboration around the needs of students will be built into our structure. Teachers will meet weekly after school on Wednesdays to collaborate. Teacher meetings will alternate between meetings of all teachers and department meetings. During these weekly meetings, teachers will regularly revisit the curriculum and analyze student success on mastery-based tasks at different levels. Special Education Teachers will be part of the learning teams and attend weekly collaboration meetings to discuss student issues with Preceptors and other teachers. Teachers in the Special Education Department, in addition to joining teacher meetings, will also meet as a team on a weekly basis to write IEPs and monitor student progress towards IEP goals. Staff members (Teachers, Special Education Teachers, Preceptors, BIS) who work with the same teams also will meet during Wednesday collaboration meetings to analyze student attendance, behavior, and academic achievement and discuss common interventions that can improve student outcomes. Further, teachers will collaborate in writing through shared Google Docs as well as email. Finally, the Specialized Services Coordinator will work with the CSE and specialists from the RCSD and other districts of residence to coordinate student services with Special Education Teachers and other staff. Additionally, during the summer, staff members will collaborate to analyze and improve all curricular resources, as described in *B. Curriculum*.

## **E. EVALUATION**

**Evaluation Processes and Procedures:** The school will have a robust evaluation process and follow pre-defined procedures to ensure that the school regularly monitors the performance of the Board, school leaders, staff, and our programs. The Board will conduct an annual self-evaluation and reflection process. The results of the self-evaluation will be discussed annually at the September Board retreat. Action plans will be created to address the areas identified, and the Board, specifically the Governance Committee, will monitor the plan throughout the course of the school year to ensure intentional focus and improvement.

The Board will be responsible for evaluating the school through a formal evaluation of the CEO using the BoT evaluation tool. The CEO's annual evaluation will be designed to ensure

improvement and achievement of the school's mission, goals, and benchmarks in the Framework; given that academic data lags, the evaluation will be based on the school's prior year's progress toward the aforementioned goals. The CEO and school leaders will develop written plans for managing the school each year, including regular communications, meetings, staff training and development, and data reporting. While the exact systems of management fall outside the realm of governance, a review of this system as a whole will provide the Board with the assurance that appropriate management systems are in place to identify strengths, as well as drive the school toward excellence, continuous innovation, and improvement. The CEO will evaluate her direct reports, including the Principal and operations staff; the Principal will evaluate his direct reports, including the Assistant Principal; and the Assistant Principal will evaluate teachers and non-academic staff twice per year. More specifically, all teachers, Preceptors, and staff will receive an informal written evaluation at the end of the second quarter and a formal evaluation at the end of the fourth quarter. Results from all evaluations will be used to hold the Board, school leadership, teachers, and staff accountable for the overall success of the school.

**Holding Teachers Accountable:** Teachers are held accountable through an intensive, supportive evaluation process that includes weekly classroom observations by the Assistant Principal, monthly peer observations, and ongoing feedback from mentor teachers. Each teacher sets performance goals twice annually, aligned with the school's Pillars, Organizational Values, and Benchmark Indicators. They receive a mid-year written evaluation and a summative formal evaluation at year-end, based on instructional quality, student performance data, and demonstrated commitment to the mission. Evaluations draw from a customized framework adapted from the NYS Teaching Standards and EngageNY, tailored to Vertus Middle's values and priorities.

**Evaluating the School's Effectiveness:** The success of Vertus Middle will be judged on how it succeeds in making progress toward its mission. A clear system based on the Pillars, Organizational Values, and Benchmark Indicators provides the framework for evaluation of all aspects of the school. A sample of the system, which will be set by the Board, is shown below:

Benchmark Goals			
The Mission: Preparing Leaders of Character			
The Four KDEs/Pillars			
Strong Relationships	Personalized, Year-Round Academics	Career Preparation	Character Education
Organizational Values and Benchmark Indicators for Each Pillar			
<b>Attendance</b> <ul style="list-style-type: none"> <li>• At school</li> <li>• In class</li> </ul> <b>Engagement</b> <ul style="list-style-type: none"> <li>• Discipline incidents</li> <li>• Grades</li> </ul> <b>Connection</b>	<b>Units of Study</b> <ul style="list-style-type: none"> <li>• Classes passed</li> </ul> <b>State exams</b> <ul style="list-style-type: none"> <li>• Pass rate</li> </ul> <b>Academic Growth</b> <ul style="list-style-type: none"> <li>• i-Ready growth</li> </ul>	<b>Professionalism</b> <ul style="list-style-type: none"> <li>• Internship/work attendance and punctuality</li> <li>• Dress code</li> <li>• Professional behavior</li> </ul> <b>Proficiency</b>	<b>Courage</b> <ul style="list-style-type: none"> <li>• Asking for help</li> <li>• Resolving conflict</li> <li>• Making good decisions</li> </ul> <b>Leadership</b> <ul style="list-style-type: none"> <li>• Role model</li> <li>• Leading teams</li> </ul>

<ul style="list-style-type: none"> <li>• Student, parent, and staff surveys</li> <li>• Student and staff retention and satisfaction</li> </ul>		<ul style="list-style-type: none"> <li>• Career course grades</li> </ul> <p><b>Career Exploration</b></p> <ul style="list-style-type: none"> <li>• Career exploration experiences and activities</li> </ul>	<ul style="list-style-type: none"> <li>• Community service</li> </ul> <p><b>Responsibility</b></p> <ul style="list-style-type: none"> <li>• Participation</li> <li>• Persistence</li> <li>• Setting goals and tracking progress</li> </ul>
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Organizational goals for the Benchmark indicators will be set annually. The Board will approve the Benchmark Indicators, including goals and measures for each indicator, and will monitor progress against the Benchmark Indicator goals throughout the year. The annual Benchmark Indicator goals will be designed so that the school will meet all the Achievement Goals discussed in *A. Mission Statement, Objectives and Goals*. Students will use the Benchmark Indicators as the basis for setting their own goals in their ILP. In addition, staff will refer to the Benchmark Indicators in setting their professional goals. A data dashboard will track progress in Benchmark Indicators at least quarterly, and school leadership will monitor progress in many of the Benchmarks more frequently. Data days during quarterly staff professional development will allow staff to work collaboratively with administrators to review data and create teams and plans for revising policies, curricula, programs, training, coaching, monitoring, staffing, resources, the use of time, or making other adjustments to improve outcomes. Weekly adjustments will also be discussed and confirmed during weekly staff meetings, based on weekly data snapshots. In addition to the data above, Board and management reports will include operations, financial, and compliance data.

**Programmatic Audits:** Vertus Middle is committed to continuous growth and improvement and is constantly analyzing our program and fulfillment of our mission. On an annual basis, Vertus Middle will conduct a more formalized programmatic audit to ensure we are meeting the needs of our young men. We will conduct an audit of Edgenuity for coursework, review curriculum maps and update as needed, and review and update our character curriculum. This is accomplished during summer professional development.

**Monitoring Progress:** Vertus Middle will use a range of qualitative and quantitative metrics to evaluate program success and progress toward our mission and goals. Data on student achievement, including exit tickets, assessments, attendance, and disciplinary referrals will be analyzed to identify trends, inform instruction, and assess the effectiveness of academic programs. Formal and informal surveys of staff, students, and families will be conducted annually to evaluate school culture, program quality, safety, and model effectiveness. The CEO will review data with the SLT to make programmatic changes as needed (e.g. add sports/clubs, etc.), and results will be shared with the Board following each survey. Assessment data will be reviewed during quarterly teacher professional development days, where staff collaborate to identify instructional gaps and improvement strategies. If benchmark goals are not met, the School Leadership Team (SLT) will analyze gaps, develop action plans, and adjust programming during summer PD. The SLT will provide regular progress updates to the Board. Additionally, an annual report will be shared with stakeholders to communicate the school's progress toward its mission and commitment to continuous improvement.



**Family and Student Satisfaction:** Vertus Middle will conduct family and student surveys each fall for students and spring for families to gauge satisfaction at least annually, which will be published in the school's annual report. The school will also use student attrition and parent/guardian grievances as data points with which to evaluate satisfaction and inform schoolwide decision-making. Preceptors will monitor family satisfaction in bi-weekly calls home and raise significant concerns to the Assistant Principal. School leaders will attend and check in with families at family nights so that they also have an informal pulse on family satisfaction. We will formally survey families annually during a family night to assess overall satisfaction with the school. Family survey results will be discussed with the SLT and reviewed with all staff during professional development to inform program improvements in school culture, programming, communication, and family engagement. Findings, both areas of strength and areas in need of improvement, will be shared with the school community through website updates, social media pages, and our annual report demonstrating our commitment to listening and acting on feedback.

**Evaluating Family and Community Involvement:** We will strive to have active parent engagement at our school and ensure families and the community have ample opportunities to be involved. We will host three family nights a year, and our goal will be for 85% of families to attend each family night or to meet with us at an arranged alternative time at school or at home. We will also utilize a data dashboard to track calls home, home visits, family/community volunteer opportunities, and schoolwide events to evaluate family and community involvement.

## **F. FACILITIES**

**Facilities Table:** For facility planning purposes, we estimate that we will need the following to implement our proposed program.

	Year 1	Year 2	Year 3	Year 4	Year 5
Gen Ed classrooms	4	8	8	8	8
Sped Classrooms	0	0	0	0	0
Guidance Offices	1	1	1	1	1
Admin Offices	1	1	1	1	1
Cafeteria	1	1	1	1	1
Auditorium	0	0	0	0	0
Conference Rooms	1	1	1	1	1
Nurses Office	1	1	1	1	1
Learning Labs	2	4	4	4	4
Small Group Pull-Out Space	1	2	2	2	2
Reflection Room	1	1	1	1	1

**Facility Needs:** Integral to Vertus Middle's mission and key design elements is a blended learning program; thus, space is needed for both traditional teacher-led classes as well as larger communal spaces to serve as Learning Labs. Each Learning Lab will have three learning teams assigned to it (approximately 16-20 students), which will necessitate larger spaces for each lab. Our program will also require small group pull-out spaces (2) and a reflection room. These spaces will allow the school to implement our key design elements and ultimately meet our mission. Sports teams will make use of Rochester city athletic fields for outdoor sports activities, a practice



currently in place at the high school.

**Facilities Plan:** Vertus Middle has not yet secured a facility but is considering expanding within the current Vertus High premises at 21 Humboldt St, Rochester, NY 14609. Given the intent to formally merge the two educational corporations, this option would facilitate a seamless experience for students and their families. Lease and utility expenses have been built into the budget and necessary renovations would be paid through financing or fundraising. The CEO, Board, and Facilities Subcommittee led by Board member Evan Gallina, a Partner at Gallina Development Corp, are researching facility options citywide and working with the landlord to assess the feasibility of acquiring more space in the current building. Galina brings over 9 years of experience in commercial and industrial real estate and will assist with contract negotiations. Assuming approval is granted towards the end of December 2025, the Facilities Subcommittee will commence more serious discussions with prospective landlords. The objective will be to secure a facility by June 2026, initiate renovations by September 2026, and obtain our Certificate of Occupancy by May 2027. Vertus Middle will only consider facilities that are or can be made ADA-accessible and provide a clean, safe, welcoming environment with flexible learning spaces that support blended learning.

**Funding Plan:** The budget includes funding for the facility, with annual expenses as follows:

- Rent/lease: \$185,000
- Gas and electric: \$41,000
- Custodial and cleaning: \$90,000
- Repairs and maintenance/other facilities expenses: \$46,000
- Security system: \$3,300

If renovations are required, they will be funded either through financing or fundraising.

## **G. INSURANCE**

Vertus High currently purchases its insurance through Austin & Co., Inc. who is highly experienced in servicing insurance needs of charter schools. Austin & Co. has provided the following quote for insuring the new school (which covers all the required elements) in alignment with enrollment (e.g., protection for up to 190 students), staffing (e.g., Workers' Comp for full and part-time employees), program design (e.g., year-round design), facilities, and budget based on current rates.

Our proposed Budget and Cash Flow indicate that funds have been set aside (lines 89 and 131) for insurance coverage each year. This coverage ensures that Vertus Middle is prepared to mitigate risk associated with operating a public charter school, including but not limited to physical injury, property damage, student accident, and cyber threats. Vertus Middle will maintain the following insurance coverage, which is available in the local market.

**Insurance Estimate Year 1**

*(This is a ballpark estimate and is subject to completed applications and underwriting review. Rates subject to change.)*

For: Vertus Charter School- Middle School		Date Prepared: 06/23/25	
Coverage		Year 1 to	
		Limits	Premium
1 Hartford	<b>Property – Choice Form</b>		
	Business Personal Property (BPP) including Improvements & Betterments, Computer Hardware & Software Replacement Cost & Agreed Value Earthquake & Flood	250,000	\$4,500
		1,000,000	
	<i>Property Deductible:</i>	2,500	
	<i>Earthquake/Flood Deductible:</i>	25,000	
	<b>Equipment Breakdown</b>	Included	
	<b>Business Income with Extra Expense</b>	1,000,000	
	No Coinsurance Provision		
	<b>Crime</b>		
	Employee Theft including ERISA	350,000	
2 Travelers	Forgery	275,000	
	Money & Securities- Inside / Outside	50,000/25,000	
	<b>Automobile</b>		
	Hired & Non-Owned Liability	1,000,000	\$1,000
	Hired Physical Damage - \$500 deductible	ACV	(Incl DMV Fee)
	# of Vehicles	5	
	Comprehensive / Collision Deductible:	1,000/1,000	
	<b>Excess Crime</b>		
	Employee Theft	1,000,000	\$6,000
	<i>Retention:</i>	350,000	
4 Great American	ERISA	500,000	
	Computer Fraud	1,000,000	
	<i>Retention:</i>	2,500	
	Funds Transfer Fraud	1,000,000	
	<i>Retention:</i>	2,500	
	Social Engineering	100,000	
	<i>Retention:</i>	5,000	
	<b>Cyber Risk Coverage</b>		
	Privacy & Security	2,000,000	
	Cyber Extortion	2,000,000	
4 Great American	Public Relations	2,000,000	
	Data Restoration	2,000,000	
	<i>Retention:</i>	10,000	
	Social Engineering	150,000	
	Full Prior Acts	Yes	
	Total Aggregate Limit	2,000,000	
	<b>Directors &amp; Officers</b>		
	Including Educators Legal Liability	1,000,000	\$9,000
	Internet Liability	Included	
	Workplace Violence	100,000 sublimit	
4 Great American	Employment Practices Liability	1,000,000	
	Third Party Liability	Included	
	<i>* Retention:</i>	15,000	
	Fiduciary Liability	1,000,000	
	<i>* Retention:</i>	1,000	
	Defense Cost Outside Limit of Liability		
	<i>*Applies to both Indemnity &amp; Defense Costs</i>		

**Insurance Estimate Year 1**

*(This is a ballpark estimate and is subject to completed applications and underwriting review. Rates subject to change.)*

For: Vertus Charter School- Middle School		Date Prepared: 06/23/25	
Coverage		Year 1 to	
		Limits	Premium
5 United Educators	<b>General Liability</b> Any One Occurrence Annual Aggregate Abuse & Molestation Coverage Corporal Punishment Telehealth Coverage Employee Benefits Liability Pandemic Exclusion <i>Enrollment:</i>	1,000,000 3,000,000 Included Included Included Included Yes <b>95</b>	<b>\$9,000</b>
	<b>Excess Liability</b> Any One Occurrence Annual Aggregate Abuse & Molestation Coverage Corporal Punishment Foreign Hostilities Pandemic Exclusion	10,000,000 10,000,000 Included Included 5,000,000 Yes	<b>\$5,000</b>
	<b>Excess Directors &amp; Officers / ELL</b> Including Educators Legal Liability Employment Practices Failure to Educate	10,000,000	<b>\$4,000</b>
6 Travelers	<b>Excess Fiduciary Liability</b> Annual Aggregate	3,000,000	<b>\$500</b>
7 Hartford	<b>Workers' Compensation &amp; Employers Liability</b>  <i>Class Code</i> <i>Description</i> 8868      School, Professional 9101      School - All Other Experience Modification Workers' Compensation is subject to Audit	1,000,000  <b>\$1,000,000</b> <b>\$0</b> <b>N/A</b>	<b>\$5,000</b>
	<b>Student Accident</b> Accident Medical Expense Accident Dental Expense <i>Deductible (Per Accident):</i> Online Learning - Worldwide Coverage Including Interscholastic Tackle Football Type of Coverage	50,000 Included 0 Yes Yes Full Excess	<b>\$400</b>
9 Philadelphia	<b>Catastrophic Student Accident</b> Accident Medical Expense Accident Dental Expense <i>Deductible:</i> Online Learning - Worldwide Coverage Including Interscholastic Tackle Football Type of Coverage	3,000,000 Included 50,000 Yes Yes Full Excess	<b>\$400</b>
<b>Total Annual Estimated Premium</b>		<b>\$44,800</b>	

## **H. NON-ACADEMIC OPERATIONS**

**Health Services:** Vertus Middle will utilize a part-time RCSD nurse to provide health services at the school. The primary responsibilities of the school nurse will include maintaining students' records, supervising the disbursement of medication, and treating students with minor illnesses or injuries. The nurse will be responsible for all record-keeping and correspondence related to these responsibilities. When the nurse is not on-site, those responsibilities that can be delegated will be assigned to the Assistant Principal. In addition, at least two staff members will be trained in cardiopulmonary resuscitation (CPR) and the use of automated external defibrillator (AED) equipment, which will be accessible during the school day and at any on-site school-sponsored event. Cumulative health records will be stored in locked filing cabinets accessible only by authorized staff members. These records will include proof of immunization and authorization for the administration of medication. All visits to the nurse, including reason and treatment, will be documented in each child's file. The school will also contract with other health providers as needed, as discussed in *Section II.G, Special Student Populations and Related Services*.

The school will implement strict policies and procedures regarding the safe and secure administration of medication, which will be communicated clearly to parents and staff. The school will only administer medication that is necessary to maintain students in school and which must be given during school hours. Only the nurse or licensed practical nurses under the direction of the nurse may administer prescribed medication that requires administration through invasive methods. The nurse may designate other staff to assist self-directed students taking their own oral, topical, and inhalant medication and will provide the training and supervision necessary to perform these tasks in a safe and effective manner. The school will require in writing both orders from a licensed prescriber and permission from parents/guardians to administer medication. Medications will be in locked storage, including refrigeration if required, within a secure health office.

**Food Services:** Vertus Middle will participate in the federal school breakfast and lunch program. Like the high school, we will utilize RCSD's food services to provide our middle school students with hot meals. RCSD participates in the Community Eligibility Option (CEO), allowing our students to receive free meals by default. RCSD cafeteria staff will prepare food on-site for our students. The facility plan will address refrigeration, preparation, and equipment. School meals will adhere to all federal nutrition guidelines and be served by certified food handlers. The school will maintain scrupulous records regarding meals taken and eligibility and has budgeted additional funds for students who may not be eligible for free lunch but are unable to pay. Day-to-day implementation of the school's food services shall be the responsibility of the Facilities & Athletic Director.

**Transportation:** Under state law and RCSD Policy 8000.011, Vertus Middle students will receive transportation services for which similar district students are eligible. For middle school students who live 1.5 miles away from the school, RCSD provides passes for Regional Transit Service (RTS) buses run by the Rochester Genesee Regional Transportation Authority. Students who live within the 1.5-mile radius will be responsible for getting to school on their own. Charter school students must fill out an Application for Transportation on the RCSD website by April 1st each year. The school has budgeted for passes on days when the district is not in session. The Facilities & Athletic

Director will be responsible for coordinating the distribution of bus passes. Transportation for students with special needs is dictated by the student's IEP. This plan is reviewed each year by the CSE to determine appropriate transportation. The Transportation Department must adhere to the transportation requirements set forth in the IEP. If a parent feels transportation does not fit the child's needs, the parent can go before the CSE to request a change to the IEP.

**Non-academic Operations:** The CEO will oversee various individuals/outside vendors who manage and oversee the non-academic operations of the school. The CEO will oversee the IT/Technology employee; the administrative assistant, who will oversee student information and other record-keeping (student enrollment, student records, attendance); and DeJoy & Co., who will oversee procurement, compliance, and reporting. Vertus Middle will utilize PowerSchool to manage student information. The Facilities & Athletic Director will oversee the food service, transportation, and facility, including building security, maintenance, and custodial services.

## **I. FAMILY AND COMMUNITY INVOLVEMENT**

**Involving Families and the Community Pre-Opening:** Vertus Middle has worked actively to involve families and the community in our application process; we have attended community events, posted flyers about our potential school, surveyed families to determine interest in sending their child to our school, shared a form to solicit input and feedback about our school on our social media outlets and at various events such as the Vertus High graduation, the Aberdeen Fair, etc., among other opportunities for involvement. We believe in the power of community and involving our families in our school, as it ultimately leads to higher levels of student success and achievement. As emphasized throughout this application, one of the Vertus Pillars is Strong Relationships, and that drives the vision for family and community involvement. At Vertus Middle, we view families and the larger community as invaluable assets to the success of our students and school. During the pre-opening phase, we will continue fostering the relationships currently in place with our students and families, and with organizations such as the YMCA and the Boys & Girls Clubs, and those who have demonstrated support for Vertus Middle. We will ensure that families, across all demographics, are aware of the new school and are provided opportunities to apply to, visit, and learn more about the school. As described in *F. Enrollment, Recruitment, and Retention*, we will monitor applications and ensure that young men throughout Rochester are aware of the great opportunity of attending our middle school. Furthermore, we will continue to ask questions, listen, and adapt to the feedback and input we receive from families and the community regarding the school and its design.

**Communicating with Families:** At Vertus Middle, communication methods will include regular family nights, newsletter communications, social functions geared toward the community, and an online platform. These methods will be translated by Spanish-speaking staff or hired interpreters. We will also have staff members engage in in-home visits and other direct communications with families to encourage engagement. At the start of each school year, we will work on building relationships with our students and their families through various means. Through our Guardian Promise (in the Student Family Handbook), we promise to communicate with all our families bi-weekly through phone calls or home visits, and we will hold three family nights each year (during August, November, and March), where leaders, Preceptors, teachers, BIS staff, and other staff meet with all families to update them on student progress. The

School/Family/Student Agreement includes a promise to attend family nights. We will devote time on these evenings to establishing a strong channel of communication that will provide the foundation for our students' academic and social-emotional growth. New families will meet Preceptors, teachers, BIS staff, and leadership staff, and become familiar with school policies while also having an opportunity to purchase school uniforms and have dinner. Preceptors will meet individually with the family of each newly enrolled student at least twice before school starts to build the relationship, educate families about our school model, and set expectations. Returning families will be given a clear picture of their student's academic growth and discuss goals for the new school year.

At Vertus Middle, Preceptors will serve as the primary point of contact for students and their families. They are required to call each student's guardian with a progress update at least once every two weeks, with calls logged and reviewed by the Assistant Principal. These check-ins also serve to share school news and prevent the pattern of only calling with problems. When issues arise, Preceptors increase the frequency of communication. Teachers will also reach out to discuss academic strengths and challenges, and in-person family meetings—at school or at home—will be scheduled for students facing serious academic, attendance, or behavior concerns. Our Behavior Intervention Specialist (BIS) will regularly call families to support positive behavior. An automated system will notify guardians of unexcused absences, followed by a Preceptor call. Written Progress Reports will be prepared at the end of each of our five grading periods and reviewed at family nights or hand-delivered to ensure receipt. Reports include grades, assessment results, GPA, and attendance. Families will also have real-time access to student progress through the Edgenuity Parent Portal and an online system with grades, assignments, attendance, calendars, and messaging—ensuring families stay engaged in their child's success.

Vertus High has developed a robust online presence to communicate school updates and happenings with families and the school community; Vertus Middle will do the same. The school's website will be continuously updated to provide various resources. We will create and distribute a quarterly newsletter to families and the school community. Academic data, including i-Ready and state assessment results, will be shared in the newsletter to promote transparency and accountability. Finally, we will actively communicate our successes and celebrate achievements. For example, families of our middle schoolers will be invited to join us at our annual Induction Ceremony, a Saturday ceremony where all students new to Vertus earn the Vertus Blazer. This very well-attended ceremony is an important cultural ritual in which we mark the student's first significant step toward becoming a Vertus man. The ceremony is a strong builder of school culture among students and families.

**Plan for Family and Community Involvement:** Once the school opens, family members and the community will be welcome to visit and volunteer at Vertus Middle. Staff will be expected to respond to parent queries within 24 hours and via each parent's identified preferred method(s); these will be evaluated accordingly. Developing relationships with new families will begin each year in family information meetings (recruitment-related) and continued through the enrollment process, including individual family home visits at the beginning of each school year. Parent satisfaction surveys will inform ongoing quality improvement work and staff evaluations. Families will annually review our Student Family Handbook and our School/Family/Student Agreement and Non-Violence Pledge. We will hold events such as Back to School Night, Black History Month,



among others, to encourage families to visit the school and participate in their students' learning. We will also host speakers from within our community to share their knowledge and expertise with our students and their families. To further engage families with the school community, we will establish Parents on Duty (POD). POD members will share responsibility for coming in to volunteer at events. We recognize that families are busy, and their time resources are limited; thus, the opportunities we provide will be designed to be engaging and informative.

**Helping Their Children Grow and Achieve:** Vertus Middle will work in partnership with families to help their child grow and achieve. We will be in constant communication with families about their child's academic and behavioral progress. To support families in this, we will host three family nights each year; these events will include opportunities for families to learn more about the school, the work students are doing, and how they can support them at home. We will also send weekly updates to families with tips on improving attendance, behavior, and study tactics. Our goal is our students' success, and we will work in collaboration with our families to ensure students have every opportunity to achieve their highest potential.



**Community Resources:** The Board is comprised of members who are well-connected throughout the community and able to identify and facilitate strong partnerships. To date, the Board and the school have secured strong community partners for Vertus High that have aided in our young men's growth and development. Many of those, however, are specifically geared toward high school students (dual enrollment, internships, etc.). Vertus Middle views community partnerships as essential to achieving its mission and meeting the diverse range of student needs. We will explore how some of the existing partnerships could expand to serve younger students. That said, there are several partnerships in place that we intend to continue, such as our partnership with Edceptional, Charter Champions, and Sankofa (provides mental health services, including counseling and trauma-informed care for students). We will keep exploring community partners for middle school students. Community partnerships at Vertus Middle will continue to help Rochester students connect their learning to life, building confidence, and providing additional layers of support to ensure they can succeed in school and beyond.

**Successful Models:** Vertus High has been highly successful when it comes to family and community involvement. Vertus Middle will implement the same approach and expects to yield similar results. To ensure our methods yield positive results, we will evaluate the success of our engagement efforts on a regular basis. We have a goal that 85% of families attend each family night or meet with the school at an arranged alternative time at school or at home; Vertus High has achieved this goal for almost every family night since the school's inception.

Additionally, educational research highlights the importance and benefits of family engagement. However, we know that intentional efforts must be made to ensure parents and families participate in the life of the school. According to research at The Iris Center at Vanderbilt

University's Peabody College of Education and Human Development, "in order to engage families, educators generally must:

- **Get to know families.** This includes their family composition, challenges, and experiences.
- **Build positive relationships.** This entails establishing trust and mutual respect.
- **Meaningfully involve families.** This means actively creating opportunities for parents to collaborate with educators."<sup>24</sup>

Our entire school model is designed to ensure our young men are successful and prepared to be tomorrow's leaders; key to that is developing strong and lasting relationships with the young men and their families centered on trust and respect.

## **J. FINANCIAL MANAGEMENT**

**Annual Budgeting Process:** The school will have an active finance committee that includes three Board members including the Treasurer, the CEO, and the school's outsourced accounting representative from DeJoy & Co. This committee will continue to meet monthly and will be charged with reviewing and providing input into the annual budget, presenting financial recommendations to the Board, and reviewing financials on a regular basis to ensure fiscal viability. The finance committee will review the preliminary annual budgets each year prior to presentation to the full Board and consult with school leaders during the preparation of the budget. Each year, the draft budget will be discussed first with the finance committee and then with the full Board, typically in April, again in May, and then again in June for formal approval. All versions will be sent out in advance. School leaders and Board members share the viewpoint that it is critical to plan the annual budget well and remain within it. If expenses are running high, adjustments will be made immediately to bring the budget back into balance.

**Policies, Procedures, and Systems:** Vertus Middle will contract with a local firm, DeJoy & Co., to provide policy, procedure, and general fiscal advice; complete title and grant budgeting and tagging; assist with audit preparations; be a third party to reconcile bank accounts; collaborate with the CEO and finance committee for annual budgeting; and complete all accounts receivable and payables. Vertus Middle will use accrual basis accounting in accordance with Generally Accepted Accounting Principles (GAAP) for its books, including budget reports, chart of accounts, and the general ledger, all financial statements, and any reporting to the IRS or other governmental entities. The school will adopt the Financial Policies and Procedures manual currently utilized by the high school, and it will follow this when managing the school's finances. The CEO will oversee the accountant and together they will be responsible for administering the school's adopted policies and ensuring compliance with Board-approved procedures.

**Contracted Financial Services:** The accountant's role is described above; the accountant will report to the CEO, serve on the finance committee, attend all Board meetings, and present financial updates to the Board.

**Providing Financial Oversight:** The Vertus Middle Board will provide fiscal due diligence and financial oversight of the school through four primary mechanisms: a finance committee

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<sup>24</sup> The IRIS Center. (2008, 2020). *Family engagement: Collaborating with families of students with disabilities*. Retrieved from <https://iris.peabody.vanderbilt.edu/module/fam/>

(described above); the annual budgeting process (described above); regular reporting to the Board; and an annual fiscal audit (described below). Regarding Board reporting, the accountant will create a formal financial report, which the CEO will send out prior to the Board meeting each month. The report will show the actual spending compared to the budget, highlighting areas where expenses are trending high. The accountant and finance committee representative will present this report at the Board meeting, and Board members will raise any questions or concerns. Furthermore, the finance committee and accountant will ensure all fiscal compliance and reporting requirements are adhered to through its regularly scheduled committee meetings.

**Protecting Student and Financial Records:** The CEO will oversee the IT/Technology employee who will be responsible for maintaining and safeguarding student records. Access to electronic versions of these records will be restricted to the CEO, IT/Technology employee, and other individuals who are authorized as necessary. These records will be protected by passcodes. Hard copies of these records will be securely stored in a locked filing cabinet within the school's offices. Access to these physical files will also be limited to the CEO, IT/Technology employee, and those deemed appropriate, each of whom will possess a key. Additionally, school administrators will manage and oversee attendance records, RCSd will provide the school with free and reduced lunch data, and special education services and records will be overseen by the Specialized Services Coordinator. DeJoy & Co. will maintain all financial records.

**Fiscal Audits:** Toward the end of each fiscal year, our independent audit firm will audit the school in accordance with NYSED procedures and established audit practices. The audit firm will meet with the Board in advance to discuss the audit process, roles and responsibilities, and timelines. During the audit, any issues or questions will be directed to the Treasurer, who can consult with the Board Chair and bring issues to the full Board as needed. The final audit report will be submitted in draft form to the full Board for approval at a Board meeting.

#### **K. BUDGET AND CASH FLOW**

**Budget Narrative:** The CEO of Vertus Middle has extensive experience managing and overseeing a multimillion-dollar budget at Vertus High. As CEO, each year Locey has ensured that the school maintains a balanced budget and has made necessary adjustments to stay within the school's budgeted amount. The proposed budget is based on the target enrollment of 95 students in year one and 190 students in year two (and thereafter). We do intend to over-enroll each year to ensure attrition does not undermine revenue assumptions. In addition to per-pupil revenue, the budget also accounts for \$300,000 of Charter Schools Programming (CSP) grant funding in the pre-opening year, \$250,000 in year one, and \$200,000 in year two of the charter, totaling \$750,000. We intend to apply for a CSP grant to support planning year activities and allow us to hire the necessary staff to begin to build and implement the new middle school; this will also support the purchase of technology, equipment, and software licenses, leasehold improvements.

In order to establish the Pillar of Strong Relationships, the school starts with only one grade, which limits per-pupil revenue. This start, however, is essential to enable the school to create and implement a school culture that ensures students feel cared for, welcomed, and included while also setting high expectations for academic and behavioral performance. The following year, we will add another grade level (grade 8), and that year, the school will reach its full enrollment. By

year 2 of the charter, we will have an enrollment size sufficient to support all infrastructure and personnel costs. By year five, we will have amassed a surplus of nearly \$2.5 million.

**Pre-Opening Budget:** We intend to apply for the CSP and receive \$300,000 for the pre-opening year. The budget also assumes \$150,000 from other grants (Vertus High has been highly successful in writing and securing grants; we anticipate the same will be true for Vertus Middle. Additionally, the school has budgeted funds each year to support grant writing initiatives.), as well as \$100,000 in contributions, donations, and fundraising. Vertus High has a strong history of fundraising and anticipates that given the extensive support we have received for the middle school, we will be able to raise these funds. Thus, the pre-opening budget is based on a revenue of \$550,000.

Expenses accrue primarily to start-up personnel. Because this is an extension of the current high school model, many of our staff members will be employed at Vertus High but supporting the design and start-up of the middle school. These individuals' salaries are calculated on a part-time basis within the budget to reflect the middle school student enrollment. The Assistant Principal will be brought on full-time, and the Student Recruiter will be brought on part-time during the pre-opening year to ensure a successful start-up. The remaining individuals will be shared with the high school, ensuring continuity of operations and a cost-effective launch. During the pre-opening year, the members of SLT will begin developing and customizing the curriculum, preparing the facility and outfitting the Learning Labs, recruiting students and staff, and designing pre-service training during the pre-opening year.

**Year 1 Budget:** The budget anticipates \$1,871,100 in per pupil revenue, with total revenue of \$2,358,500. The school intends to use another \$250,000 of its CSP grant this year. Vertus Middle staff will start work in July, and personnel costs account for 63% of expenditures, with another 5% for contracted services. Some of the most significant non-personnel expenditures include approximately \$1400 per student for hardware and educational software, access to technology, etc. In addition, the school also budgets for books and materials to support project-based learning. Funds for at-risk students include special education certified teachers, contracted services and special education supplies and materials. Facility costs, including lease, maintenance, utilities and supplies amount to 12% of the budgeted expenses. With respect to cash flow analysis, in no month does the school experience a negative ending cash balance. The net income is \$297,240.

**Year 2 Budget:** The biggest change in revenue will be per pupil funds based on enrollment increasing to 190 by Year 2. The budget anticipates \$3,793,800 in per-pupil revenue, with total revenue of \$4,375,600. The school intends to use the final \$200,000 of its CSP grant this year. The last installment of CSP funds will be used in Year 2, and after that, the school's budget will rely on per-pupil, title funds, and contributions and donations through fundraising. Vertus Middle staff will start work in July and personnel costs account for 67% of expenditures, with another 3% for contracted services. Given the addition of the 8<sup>th</sup> grade, some of the most significant non-personnel expenditures include nearly \$200,000 in funding for athletics. Funds for at-risk students include special education certified teachers, contracted services and special education supplies and materials. Facility costs, including lease, maintenance, utilities and supplies amount

to 10% of the budget. With respect to cash flow analysis, in no month does the school experience a negative cash balance. The net income is \$726,600.

**Year 3 Budget:** The budget anticipates \$3,855,200 in per pupil revenue, with total revenue of \$4,249,300. Vertus Middle staff will start work in July and personnel costs account for 68% of expenditures, with another 3% for contracted services. Given that enrollment and staffing remain largely the same, the revenue and expenses are similar to year 2. Facility costs, including lease, maintenance, utilities and supplies amount to 10% of the budget. With respect to cash flow analysis, in no month does the school experience a negative cash balance. The net income is \$490,900.

**Year 4 Budget:** The budget anticipates \$3,913,200 in per pupil revenue, with total revenue of \$4,325,400. Once again, personnel costs account a large percentage of our expenditures (68%), with another 3% for contracted services. Facility costs, including lease, maintenance, utilities and supplies amount to 10% of the budget. With respect to cash flow analysis, in no month does the school experience a negative cash balance. The net income is \$486,000.

**Year 5 Budget:** The budget anticipates \$3,971,800 in per pupil revenue, with total revenue of \$4,403,500. Once again, personnel costs account a large percentage of our expenditures (68%), with another 3% for contracted services. Facility costs, including lease, maintenance, utilities and supplies amount to 10% of the budget. With respect to cash flow analysis, in no month does the school experience a negative cash balance. The net income is \$495,500.

**Budget and Key Design Elements:** In order to achieve the Vertus Middle mission and vision, the budget priorities are as follows:

- Salaries and benefits for a large number of Preceptors (10 once at full enrollment) to provide support to small learning teams; by the end of the first charter term Vertus Middle will be spending over \$2 million on Preceptor salaries alone.
- Sophisticated technology using proven curriculum, instruction, and assessment software to enable Learning Labs to provide highly individualized student experiences.
- AIS and BIS staff members to ensure our male students receive the needed academic and social-emotional support to thrive. These salaries amount to nearly \$2 million over the five years.
- A social worker and counselor to provide an extra layer of support to our students. These salaries are approximately \$330,000 over the 5 years.
- A warm and clean building that will suit Vertus Middle's innovative needs for large labs and small classrooms. By Year 5 Vertus will be spending nearly \$1.75 million on the facility and is planning to build a surplus over time that will allow the school to purchase its own building.

**Contingency Plans:** Vertus Middle has a number of options to address potential budget and cash flow challenges:

- 1) While the school intends to over-enroll (within allowed limits) to address attrition, it could plausibly add another 10 students, raising over \$140,000 (this is using current per-pupil revenue numbers, which will likely be higher at the time of approval).
- 2) The budget shows a positive net income each year of the five years, demonstrating sufficient surplus to be utilized for contingency as needed.

- 3) The school can reduce some non-essential expenses, such as technology upgrades, and limit or reduce benefits, such as retirement contributions.
- 4) The school can also consider reducing staffing levels or delaying hiring decisions in the staffing plan.
- 5) School leaders and the Board can consider a short-term bridge loan.
- 6) Fundraising is an option and is discussed below.

Our goal is to build a school model that is viable on per-pupil revenue alone by Year 2, when the school reaches full enrollment. As the proposed budget demonstrates, once the school reaches enrollment capacity, it will be able to support itself on per-pupil revenue and build a surplus to maintain the health of the school in perpetuity. The budget is conservative and seeks to keep the budget within the 2-4% net income range as a surplus/contingency fund. In addition, Vertus Middle is committed to strong accountability. The Board possesses deep expertise and experience in business and administration and is organized through officers and committees to conduct regular oversight. The school has created adequate administrative positions to manage finances and operations. The school will contract with DeJoy & Co., a qualified accountant currently utilized by the high school, who will present monthly reports to the Board on the financial health of the school. Vertus Middle will be a transparent organization, presenting timely financial reports and annual audits to NYSED. Through the budgeting process and regular oversight, including CEO evaluation, the Board will maintain the financial viability of the school.

The Board and CEO recognize that CSP grant funds are competitive and not guaranteed. CSP funds are included in the attached budget, as are funds for grant writing services. Should these funds not become available, the Board and CEO will seek to raise additional funds for the school to operate in accordance with the proposed budget. Vertus High has an experienced Development Director who will be tasked with supporting fundraising for the middle school as needed.

#### **L. PRE-OPENING PLAN**

Please see *Attachment 11* for our pre-opening plan. This plan provides a timeline with key tasks, anticipated start and end dates, and responsible parties.

#### **M. DISSOLUTION PLAN**

Please see *Attachment 12* for our dissolution plan that aligns with the NYSED Closing Procedures Guide and Education Law, which describes the procedures to be followed in the event of closure or dissolution of the school. The 5-Year Budget includes \$25,000 in each of the first four years in line 141 that will be held in an escrow account to be used only in the event of dissolution.



## **Attachment 1: Vertus Charter Middle School Admissions Policies and Procedures**

### **Eligibility to Enroll**

All male students who reside in the state of New York are eligible to attend Vertus Charter Middle School (Vertus Middle). The school shall be open to any male child who is eligible under the laws of New York State for admission to a public school, and the school shall ensure compliance with all applicable anti-discrimination laws governing public schools. There are no financial or academic requirements for admission to Vertus Middle.

All students must have passed the 6th grade and will be admitted to each grade based on the following criteria:

- 7th grade: Students must be younger than 14 as of September 1 of the school year
- 8th grade: Students must be younger than 15 as of September 1 of the school year

Vertus Middle will accept only 7th graders for the 2027-28 school year and then 7<sup>th</sup> and 8<sup>th</sup> graders for each school year thereafter, to the extent seats are available.

### **Recruitment**

Vertus Middle will target first time middle school students as well as students who are at-risk of dropping out of school. In order to reach this population, the school will cultivate relationships with individuals and organizations that work and communicate with at-risk young men in Rochester, including middle and high school guidance counselors; social service organizations; faith-based organizations; sports leagues and after-school programs; truancy, gang and parole officers; juvenile justice and foster care agencies; and public housing councils. Public outreach and marketing materials will explain the model and clearly indicate that Vertus Middle is a free, public charter school open to all eligible students, including those with disabilities and English language learners. In addition, Vertus Middle will use a website and social media to disseminate information and applications. Outreach materials will be translated into Spanish and other languages if necessary. Vertus Middle will host information sessions in locations throughout the city and meet with families to explain the opportunities. Once Vertus Middle has secured its facility it will also conduct open houses and invite families to tour the school.

### **Applications**

To apply to Vertus Middle, it is only necessary that the school receive a completed application, including a home address (unless the family is unhoused). Applications will require no more information than is necessary under NYSED guidelines and are not considered a pre-registration form. To be eligible for the lottery, applications must be submitted by April 1st by families of students interested in attending the school. Applications must be hand delivered, mailed or e-mailed, and received no later than the admission period deadline listed on the form. The school will provide via e-mail and/or return postcard confirmation of applications received by the deadline.

Vertus Middle will adapt the uniform application form within the following allowable parameters: print the application form with the school's letterhead and/or logo; brand the application form by including the school's mission statement and explanatory information

about the school, and request additional information. All data elements that may be required to be submitted by the applicant will be marked with asterisk and the form will include the following notation: “\* The items marked with an asterisk (\*) are the only items that may be required in order to apply to this charter school. Any items not marked by an (\*) are optional.”

The following statement will also be included in the application form:

***Non-Discrimination Statement:*** *A charter school shall not discriminate against or limit the admission of any student on any unlawful basis, including on the basis of ethnicity, national origin, disability, intellectual ability, measures of achievement or aptitude, athletic ability, race, creed, gender, national origin, religion or ancestry. A school may not require any action by a student or family (such as an admissions test, interview, essay, attendance at an information session, etc.) in order for an applicant to either receive or submit an application for admission to that school.*

## **Preferences**

Vertus Middle will use the following preferences to enroll new students:

- Siblings of students already enrolled in the middle or high school will have an absolute preference.
- English Language Learners will receive an absolute preference, i.e., will be drawn before students living in or outside the district.
- Students residing within the Rochester City School District will receive an absolute preference, i.e., will be drawn before students living outside the district.
- Siblings of students selected in the lottery, i.e., when a student in the lottery with sibling(s) in the lottery is drawn, that student’s sibling(s) will be added next to the list.

## **Lottery**

If the number of applicants is less than the school’s number of available seats, then all applicants will be enrolled in the school. If the number of applicants by April 1 exceeds the school's available seats, a random selection lottery process will be conducted on or about April 15. At least one week’s public notice will be given for the lottery, stating the number of spaces available in each grade. The lottery will be conducted by a third party that has no affiliation with the school. The lottery will be open to the public. After checking the application to ascertain the appropriate entering grade, the child’s name will be entered into the lottery. The following will also be noted for each child entered into the lottery:

- If there are siblings applying, each child’s entry into the lottery will indicate that there is a sibling also applying.
- The home language preference will be noted so that preference can be given to students that are English Language Learners.
- The place of residence will be noted so that preference can be given to students living in the city of Rochester.

The lottery will follow these steps for each grade:

1. Siblings of students already enrolled in the school will be drawn.
2. Students who are English Language Learners.
3. Students who reside within Rochester will be drawn
4. Students who reside outside of Rochester will be drawn

Once the number of students equal to the number of available seats has been drawn, the remaining applicants will be drawn and placed on a waiting list in the order in which they are drawn. After all the names have been chosen, the parents will be notified by letter. For those students who are accepted, the letter will include a list of forms that need to be provided, including proof of age, immunization and residence except in the case of homelessness (residential utility bill, documentation from local, state or federal government agency, lease agreement, property tax bill, or payroll documentation), transcript, and an appointment time to meet with school staff to turn over the forms. Students offered enrollment must accept the offer by providing required forms within 30 days of notification.

### **Waiting List**

For children not selected, the letter will indicate their number on the waiting list and will describe the steps that will take place if a space becomes available. The school will keep accurate records of the waitlist containing the names, home addresses, telephone numbers, and grade levels of students who entered the lottery but did not gain admission. If a student withdraws, the next applicant on the waiting list in that grade will be called and will be offered the space. No new students will be accepted after the end of the third quarter of instruction, unless the Board passes a special resolution to extend the enrollment period later in the year. Student withdrawal will be permitted upon the written request of the parent or legal guardian and proof of enrollment in another school. Following the written request of the admitting school, student records will be transferred. If a student does not return in September, the school will telephone and send the family a certified letter to determine the child's status. When a space opens, the waiting list will then be activated to admit the next child on the same grade level. For applications received after the April 1 deadline, those students will be added to the waiting list in the order they are submitted. The waiting list will expire annually at the lottery drawing for the next school year.

### **Subsequent Enrollment**

After the first year, students returning to the school will be considered to be enrolled in each successive year through the completion of 8th grade. Each year, school personnel will meet with the families of all parents and guardians of currently enrolled students to discuss enrollment plans for the following school year. Parents or guardians must then submit to the school a letter of intent confirming their desire to enroll their child(ren) in the school for the following year.

## Vertus Charter Middle School

**Table 2: Public Outreach Information**

Date(s) of Outreach	Target Stakeholder Group	Description of the Outreach	Location of Outreach	Input Obtained	Action Taken on Input	Number of Attendees
07/01/25	Students	A student focus group was held at the Church of Love by high school social worker, Mr. Daniels.	Church of Love 700 Exchange St, Rochester, NY 14608	Vertus High School social worker, Mr. Daniels, hosted a focus group with 11 students aged 13-17 at his local church where he serves as a Youth Pastor. Students were asked questions to obtain input regarding the proposed middle school, such as what aspects of the program do you like? Students expressed liking the idea of projects and careers, online learning, and “cool programs.” They noted that the difference between Vertus Middle and their current school is that their local school does not offer online learning, career programming, or an all-boys model. 11 students attended, 9 of whom were young men. Of the 9, 5 said they would attend, 2 said maybe, and 2 indicated they would not. They expressed that the location of the school is important.	Students also indicated that sports are important and did not know which sports would be provided. The leadership team will work to ensure students have multiple sports offerings. This will be an area where student feedback is regularly solicited.	11 students aged 13-17
07/01/25	Parents, families, community members	Posted a link to LinkedIn inviting individuals to complete a survey soliciting feedback on the proposed model	LinkedIn	68 individuals completed the survey with 96% of respondents indicating that Vertus has a strong reputation for supporting the academic and character development of young men.	The surveys demonstrated that the community desires a middle school. Thus, the action taken is to submit this application and provide younger male youths with a high-quality educational option.	68 individuals total completed this survey
06/28/25	Parents, families, community members	Shared information about the proposed school at the Vertus High School graduation ceremony. The information, with a QR code to the survey, was presented at the ceremony	Hochstein School of Music 50 N Plymouth Ave, Rochester, NY 14614	The survey was updated to include more questions. On the updated version of that survey, 52 of 55 respondents (95%) indicated that they would recommend Vertus to other families based on their current knowledge of experience. 46 of		640 individuals were in attendance; 68 individuals total completed this survey

## Vertus Charter Middle School

06/23/25	Parents, families, community members	Flyers posted were posted at the following community centers: David Gantt R-Center, Trenton and Pamela Jackson R-Center, Willie Walker Lightfoot R-Center, and Carter Street R-Center	R-Centers throughout Rochester	55 (84%) respondents indicated that they have not heard any concerns or criticisms about Vertus that make them question the expansion. 43 of 55 (78%) respondents noted that if Vertus added a middle school, they would want to be involved in helping shape its design or programming.		68 individuals total completed this survey
06/01/25	Parents, families, community members	Posted a link to Facebook and Instagram inviting individuals to complete a survey soliciting feedback on the proposed model.	Facebook and Instagram			68 individuals total completed this survey
06/17/25	Parents, families, community members	During the June Board Meeting, the Board discussed the proposed school and provided an opportunity for public comment.	Vertus High School	The CEO, Julie Locey, shared information about the proposed school, providing at update to the Board about the application process and community engagement efforts. The Board agenda provided an opportunity for public comment.	The Board was encouraged by the positive momentum and is eager to submit the charter application.	13 individuals, consisting of the Board and school leadership, were in attendance
6/16/25	Parents, families, community members	Met with and obtained a letter of support from Kenneth A. Marvald, a Vertus High donor/supporter and former attorney for Dutch Summers	Vertus Charter School	Mr. Marvald submitted a letter of support for expanding Vertus Charter School's program to the middle grades. As an educational philanthropist, Mr. Marvald has been a part of Vertus since the beginning, supporting the school with donations such as half of a new school bus and setting up an emergency fund to help students with dire needs. Mr. Marvald "strongly support[s] the expansion" of Vertus to the middle grades.	Mr. Marvald's strong support indicates a prevalent need for a school such as ours in the community.	1
6/15/25	Parents, families, community members	Met with and obtained a letter for support from Danny Wegman, Chairman, Wegmans Food Markets, Inc.	Vertus Charter School	Mr. Wegman, a current employer of 35 Vertus students, submitted a letter of support documenting the need for an interest in Vertus expanding its reach to the middle grades.	Mr. Wegman's interest in expanding the school demonstrates need.	1

## Vertus Charter Middle School

6/15/25	Parents, families, community members	Met with and obtained a letter for support from Ty Kelly, Director, Work-Scholarship Program, Wegmans Food Markets, Inc.	Vertus Charter School	A former Vertus board member, Mr. Kelly submitted a letter of support for adding junior high to Vertus to expand the reach of its program.	Mr. Kelly's support for the middle school encourages us to continue in our path toward receiving a charter.	1
6/10/25	Parents, families, community members	Met with and obtained a letter of support from Michael P Mandina, Chairman and Corporate Fellow of Optimax Systems, Inc.	Vertus Charter School	A longstanding advocate for educational innovation and equity in Rochester, Mr. Mandina submitted a letter of support of Vertus to expand its model and open a junior high school. He indicates that he has "witnessed firsthand the powerful and positive impact Vertus has made on the lives of its students and broader community."	Mr. Mandina's support for our school demonstrates there is a need for more schools like ours in the community.	1
6/09/25	Parents, families, community members	Met with and obtained a letter of support from Robert J. Duffy, President/CEO of the Greater Rochester Chamber	Vertus Charter School	Mr. Duffy expressed his support for Vertus to secure ownership of the building they currently occupy and expand the model to serve students in junior high. He notes that "deepening their reach will only strengthen the school's already considerable contribution to Rochester's long-term economic and social health.	Mr. Duffy's letter affirms our desire to expand and serve more students.	1
06/07/25	Parents, families, community members	Attended Aberdeen Square Fair to share information about the new school with the community, as well as to solicit input/feedback into the current school design	Aberdeen Square Fair	We attended the Aberdeen Square Fair and spoke with community members about the potential school. 12 community members indicated Vertus Middle interests them as something new when completing a survey soliciting feedback. We also asked what is most important to you when considering where you/your child goes to school? Respondents indicated items such as community, discipline, safety, quality of education, leadership guidance, positive role models, a staff that cares, among others. When asked if there "is anything missing from the current Vertus School structure/mission that you would like to see implemented?" one respondent indicated a middle school; the majority	This support indicates there is a desire from families to add the middle grades.  Response re: the proposed program and any changes they would suggest are items currently being implemented within the model.	12



## Vertus Charter Middle School

				indicated nothing and to “keep doing what you’re doing!”		
5/26/25	Parents, families, community members	Met with and obtained a letter for support from Bryan Wegman, Vice President of Edceptional, Inc.	Vertus Charter School	As a partner of Vertus High, Mr. Hickman submitted a letter of support describing his interest in Vertus opening a middle school. Mr. Hickman described the challenges of students entering 9 <sup>th</sup> grade far below grade level, as well as the limited space available in local charter schools for families seeking additional options. Mr. Hickman noted that his organization runs GoodSchoolsRoc.org, and the data presented on this page indicates a need; he noted that “Vertus should have no trouble filling the seats of the junior high.”	This support indicates there is a desire from community leaders to add the middle grades.	1
03/29/25	Parents, families, community members	At an open house on March 29, 2025, Vertus Staff asked attendees to complete a short survey indicating interest to enroll.	Vertus Charter School	On the survey, 28 individuals indicated they would support the addition of a middle school (grades 6–8) to Vertus High School in Rochester, NY.  Additionally, 28 individuals indicated that if Vertus were to open a middle school, they would consider enrolling their child or recommending it to other families.	This support indicates there is a desire from families to add the middle grades.	30
03/01/22 – 03/31/25	Parents, families, community members	Over the past 3 years, Vertus has considered expanding its program; thus, we have been actively surveying families about their desire for middle grades. This survey was sent through the school’s newsletter, and over the course of the few years, 87 individuals responded.	Online/Survey	The survey had 4 questions listed and asked the following:  Based on your experience with Vertus High School, if Vertus had a middle school, would you enroll your son? 83 said yes.  If you have a younger son, would you send him to Vertus in 7 <sup>th</sup> and 8 <sup>th</sup> grade? 76 said yes; 7 indicated they do not have a son in 7 <sup>th</sup> or 8 <sup>th</sup> grade.  Do you think Rochester would benefit from a Vertus Middle School? 84 said yes.	This support indicates there has been long-standing support for Vertus Middle.	87

## Vertus Charter Middle School

				Do you think your son would have been better prepared for high school if he could have attended 7th and 8th grade at Vertus? 77 said yes		
08/24/24	Parents, families, community members	Staff members from Vertus Charter School attended the Soul Music Festival and asked community members to sign a petition indicating that "Rochester would benefit from a Vertus Middle School."	Soul Music Festival	Over 150 individuals signed the petition indicating support for the middle school.	This support indicates there is a desire from families to add the middle grades.	150
08/09/23	Community Member/ Leader	Met with and obtained a letter of support from Dr. Shaun Nelms EdD, Vice President of University of Rochester	Vertus Charter School	Dr. Nelms submitted a letter of support for expanding Vertus Charter School's program to the middle grades. He described the school's innovative character curriculum and how it is a hallmark of the school. He noted the consistent recognition of character growth the young men receive and how it encourages students to thrive for their best.	Dr. Nelms' "wholehearted support" for the school demonstrates there is a need for more schools like ours in the community.	1
10/06/22	Community Member/ Leader	Met with and obtained a letter of support from Ken Lee, the Urban District Operations Director for the YMCA of Rochester	Vertus Charter School	Mr. Lee toured Vertus Charter School and shared we shared with him the board's desire to open a middle school and serve more students. Mr. Lee submitted a letter of support on behalf of the proposed middle school and spoke to the need to provide more students with a supportive environment earlier in their educational years. He noted that the addition of the middle school would be a natural progress and would allow a school like Vertus to increase our ability to serve, save, and inspire teens in the Rochester area.	Mr. Lee's support for the middle school validated our desire to move forward and continue seeking community input.	1

## Vertus Charter Middle School

10/07/21	Community Member/Leader	Met with and obtained a letter of support from Dwayne Mahoney, Executive Director of Boys & Girls Club of Rochester	Boys & Girls Club 500 Genesee Street Rochester, NY	Mr. Mahoney submitted a letter of support expressing the need for expanding Vertus Charter School to the middle grades. Mr. Mahoney described how some Vertus students are Club members, and how they are leaders in the Club. He noted that the mission of his organization and Vertus are similar in that they work to ensure students/members are academically prepared to continue to higher education and promote personal growth in an environment of caring professionals.	Mr. Mahoney's endorsement of the middle school initiative motivates us to advance and solicit additional feedback from the community.	1
09/28/21	Community members	Hosted and received a letter of support from State Troopers Nicole Drew, Diane Caraballo, and Jeffrey Gmerek from the New York State Police, Recruitment Unit	Vertus Charter School	<p>The three State Troopers attended a Vertus Charter School event where the staff and students participated in an interactive push up competition. After interacting with the students and staff, the Troopers saw the positive impact the school was having on the students.</p> <p>They submitted a letter of support for expanding to the middle grades and noted that our "desire to reach the youth at an earlier age is commendable. Any early positive impact especially academically, would greatly impact the development of a youth's future and assets."</p>	The support from these three state Troopers to expand to the middle school was encouraging and validating. We will continue to seek more community input.	3
09/24/21	Community Member/Leader	Met with and obtained a letter of support from Michelle Calderon, the recruiter for the Rochester Police Department	Vertus Charter School	Ms. Calderon toured the school on multiple occasions after being invited to tour the school and meet students. She noted the pride the school has in the young men, and the way the school seeks to instill in students the importance of education, as well as other career opportunities (such as military or law enforcement). Ms. Calderon submitted a letter of support indicating that she believes reaching young men early is so crucial in their development.	Ms. Calderon's support for the middle school encourages us to proceed and seek further community input.	1

## Attachment 2b: Evidence of Public Review Process

Vertus Charter Middle School

June 1, 2025

Facebook and Instagram Posts

12:22  
105

Like

Comment

Share



Vertus High School

2m · 🌐



Vertus Middle School Coming Soon!



We're exploring the launch of a Vertus Middle School — and we want to hear from YOU!



Help us expand our reach and be even more effective in building young men of character from an earlier age.



Take our quick survey — your voice matters! Click the link or scan the QR code below to share your thoughts.



Let's shape the future together.

[#VertusMiddle](#) [#MenOfCharacter](#) [#warriorfamily](#)

[https://docs.google.com/forms/d/e/1FAIpQLSfGDtO\\_Zpqh3CWRoecZoVUUO\\_O4jA-b\\_eJxzbUzt3FyBTfi-Q/viewform?usp=sharing&ouid=100596864436218826906](https://docs.google.com/forms/d/e/1FAIpQLSfGDtO_Zpqh3CWRoecZoVUUO_O4jA-b_eJxzbUzt3FyBTfi-Q/viewform?usp=sharing&ouid=100596864436218826906)



Vertus  
MIDDLE SCHOOL

Coming Soon

ADDING 7<sup>TH</sup> AND 8<sup>TH</sup> GRADE



We're exploring the launch of a Vertus Middle School — and we want to hear from YOU! 📶 🔋

📢 Help us expand our reach and be even more effective in building young men of character from an earlier age.

✅ Take our quick survey — your voice matters! Click the link or scan the QR code below to share your thoughts.

👊 Let's shape the future together.  
[#VertusMiddle](#) [#MenOfCharacter](#) [#warriorfamily](#)

[https://docs.google.com/forms/d/e/1FAIpQLSfGDtO\\_Zpqh3CWRoecZoVUUO\\_O4jA-b\\_eJxzbUzt3FyBTfi-Q/viewform?usp=sharing&oid=100596864436218826906](https://docs.google.com/forms/d/e/1FAIpQLSfGDtO_Zpqh3CWRoecZoVUUO_O4jA-b_eJxzbUzt3FyBTfi-Q/viewform?usp=sharing&oid=100596864436218826906)



👍👤 You, Levi Bennett and 1 other

1 share



Vertus Charter Middle School

June 17, 2025

Board Meeting



**Vertus**  
HIGH SCHOOL

## Vertus High School

### Minutes

#### Board Meeting

---

##### **Date and Time**

Tuesday June 17, 2025 at 5:00 PM

---

##### **Trustees Present**

A. Bell, C. Gantt, D. Johnson, D. Paul, J. O'Connell, J. Wynn, V. VanVoorhis

##### **Trustees Absent**

E. Gallina, M. Mandina, S. Ash, S. David-West

##### **Ex Officio Members Present**

A. Brisson, J. Locey, L. Bennett

##### **Non Voting Members Present**

A. Brisson, J. Locey, L. Bennett

---

#### **I. Opening Items**

##### **A. Record Attendance**

##### **B. Call the Meeting to Order**

V. VanVoorhis called a meeting of the board of trustees of Vertus High School to order on Tuesday Jun 17, 2025 at 5:11 PM.

##### **C.**

### **Approve Minutes**

C. Gantt made a motion to approve the minutes from Board Meeting on 05-20-25.

D. Johnson seconded the motion.

The board **VOTED** to approve the motion.

### **D. Behavior & Social Emotional Support Report**

Presented by James Daniels, Social Worker, and Scott Rogerson, Director of Behavior Intervention

Disciplinary Framework: Behavior Intervention via Reflection Room, Parent Guardian Involvement, OSS

Support Services: CPS, Domestic Disputes, Homelessness (30.3%), Mental Health, Other legal issues

Wish List\_ Access to emergency shelter, parent intervention training, counseling for addiction issues, security tech

### **E. Gala Update**

Stephanie Campanelli, Director of Development, presented

November 15- Genesee Valley Club (200 person capacity)

Theme: Warrior Theme (Spartan vs Samurai)

Co-Chairs: Allie Bell, Dr. David & Mrs. Paul

Honoree: Evan Gallina

Gala sponsorship planning underway

## **II. Consent Agenda Items**

### **A. Month At A Glance**

Board will review and follow up with questions.

### **B. Board Statistics**

Board will review and follow up with questions.

### **C. Recruitment Update**

Board will review and follow up with questions.

## **III. Finance**

### **A. Budget vs Actual & Cash Flow**

Presented by Amy Brisson. On track for the end of the school year.

### **B. Investment Policy Vote**

C. Gantt made a motion to Approve the 50/50 allocation split for future investment in our quasi-endowment. 3% Cash equivalents, 50% equity, 47% fixed income.

J. O'Connell seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **C. 2025-2026 Budget**

D. Johnson made a motion to Approve the 25-26 budget with final compensation for the CEO.

V. VanVoorhis seconded the motion.

Executive session to discuss confidential personnel and compensation matters in the final approval of the budget for the upcoming fiscal year.

The board **VOTED** to approve the motion.

### **IV. Discussion Items**

#### **A. Junior High Application Feedback**

Julie Locey provided an update on the timeline and allowed for public comment and questions. There were none

### **V. Committee Reporting**

#### **A. Fundraising Report**

V. VanVoorhis made a motion to Approve Ben Kadar as a staff representative on the fundraising committee.

D. Johnson seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **B. Committee Membership for 25-26 School Year**

Postponed for July session.

### **VI. Closing Items**

#### **A. New Action Item Review & Report Out**

#### **B. Adjourn Meeting**

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 7:22 PM.

Respectfully Submitted,

D. Johnson

---

[info@vertusschool.org](mailto:info@vertusschool.org) | [www.vertusschool.org](http://www.vertusschool.org) | FaceBook/VertusHighSchool



Vertus Charter Middle School

June 23, 2025

Flyer posted at various R Centers throughout Rochester



# Vertus

## MIDDLE SCHOOL

*Coming Soon*

ADDING 7<sup>TH</sup> AND 8<sup>TH</sup> GRADE

Help us expand our reach and be even more effective in developing young men of character from an earlier age.



**WE WANT YOUR  
FEEDBACK**



Vertus Charter Middle School

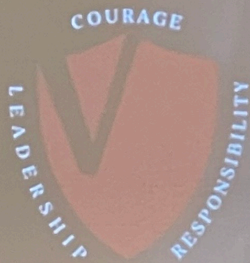
June 28, 2025

Graduation



Help us expand  
our reach and be  
even more  
effective in  
developing  
young men of  
character from  
an earlier age.

*Coming Soon*



**Vertus**  
MIDDLE SCHOOL

ADDING 7<sup>TH</sup> AND 8<sup>TH</sup> GRADE



**WE WANT YOUR  
FEEDBACK**



Vertus Charter Middle School

July 1, 2025

Student Focus Group



## Focus Group Questions



# Vertus

### Questions:

Questions ( <i>modify as appropriate for your stakeholder group</i> )	Responses
What aspects of the academic program do you like? What gives you concern?	<ul style="list-style-type: none"><li>• Like: the idea of projects and careers, online computers, hard to fail, choose what I work on, get to keep trying-like that I could go to the HS after, and they have “cool” programs</li><li>• Concerns: Have to get a 70 to pass, computers are boring (cause it's by myself), all boys</li></ul>
How is the academic design different from what other schools in the area are doing?	<ul style="list-style-type: none"><li>• My school doesn't have online learning or career programs, all boys</li></ul>
What is most important to you when considering where you go to school?	<ul style="list-style-type: none"><li>• Friends, safety, sports, clubs</li></ul>
Do you believe this school will be a good fit for you?	<ul style="list-style-type: none"><li>• 2 girls said no (obviously) out of 9 boys- 5 said yes, 2 said maybe, and 2 said no</li></ul>
Is there anything missing in this school that you would like to see implemented?	<ul style="list-style-type: none"><li>• Girls, don't know what clubs or sports they might have,</li></ul>
Is there anything else you would like to share?	<ul style="list-style-type: none"><li>• Where the school is seemed to be important to the students.</li></ul>

Thank you for your participation!

Your involvement, input, and feedback into this process is essential to the success of the school and creating a strong partnership with families and the community. Thank you for your time and openness.



## Vertus Middle School Focus Group Sign In-Church of Love

July 1, 2025

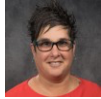
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Vertus Charter Middle School

July 1, 2025

LinkedIn Post



**Julie Locey** • [YouYouCEO and Leader Developer](#)[CEO and Leader Developer](#) 19h • 19 hours ago • Visible to anyone on or off LinkedIn

We're excited to share that we are taking the next step in our mission to develop leaders of character by planning the launch of Vertus Middle School!

For over a decade, Vertus High School has proudly served young men with a unique model focused on character, academic excellence, and strong relationships. Now, we're preparing to reach students earlier—laying the foundation for success before high school begins.

More details to come soon. If you believe in giving every young man a strong start, we'd love to connect.

[#VertusMiddleSchool](#) [#EducationInnovation](#) [#CharterSchools](#) [#DevelopingMenOfCharacter](#)  
[#RochesterEducation](#) [#VertusProud](#)



## Vertus Charter High School

250 followers

6d • 🌐

Vertus Middle School Coming Soon!

We're exploring the launch of a Vertus Middle School — and we want to hear from YOU!

Help us expand our reach and be even more effective in building young men of character from an earlier age.

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Let's shape the future together.

#VertusMiddle #MenOfCharacter #warriorfamily

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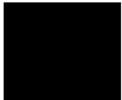
Activate to view larger image,

- [REDACTED], MSL and 32 others
- 7 comments
- 1 repost

## Reactions

[440 impressions](#)

[View analytics](#)



Pastor, Executive & Economic Development Leader, Not for Profit Leader

17h

Awesome news! Great school! Phenomenal leadership! Strategic governance!

**Like**

**Reply** 1 reply 1 Comment on Dr. Fredrick Johnson Sr.'s comment



• 1st

I help charter schools solve problems that prevent them from getting the outcomes kids deserve.

16h



and a great pipeline for future Green Tech Rochester students!

**Like**

2

**Reply**



I help charter schools solve problems that prevent them from getting the outcomes kids deserve.

16h

CONGRATULATIONS!!!

**Like**

1

**Reply**



 • 1st

Empowerer of and Executive Coach for Female Educational Leaders | Sister Leader| Stress Disruptor | Work Life Harmony Creator | Author | Book Coach

12h

Congrats Julie! 🎉 that's such great news! Here to help if you need it. Will definitely be cheering you on !

**Like**

**Reply**



 • 1st

Chief Educational Officer at Renaissance Academy Charter School of the Arts

12h

Congratulations!!! This is so exciting!

**Like**

**Reply**



 • 1st

Development Director | Community Engagement | Events | Philanthropy |Speaker | Marketing | Continual Learner | Positive Leader | Teacher | Engaging Presenter | Coach | Fitness | Yoga | Entrepreneur

10h

Such an exciting time!!!

**Like**

**Reply**



 • 1st

Thrilled to be working with our city's youth and ready to make an impact. #ProfessionalTroublemaker #StatusQuoDisruptor

18h

Absolutely amazing, this will change the education of so many young men in our city, keep doing the good work!! [hashtag#VertusWarriors](#)!!

**Like**

<sup>1</sup>  
**Reply**



## Attachment 2c: Evidence of Community Support

Vertus Charter Middle School

March 2022 – March 2025

Online/Survey

Timestamp	Based on your experience with Vertus High School, if Vertus had a middle school, would you enroll your son?	If you have a younger son, would you send him to Vertus in 7th and 8th grade?	Do you think Rochester would benefit from a Vertus Middle School?	Do you think your son would have been better prepared for high school if he could have attended 7th and 8th grade at Vertus?
3/3/2022 15 22 42	Yes	don't have a son in 7th or	Yes	Yes
3/3/2022 16 04 18	Yes	don't have a son in 7th or	Yes	Yes
3/3/2022 16 13 38	Yes	Yes	Yes	Yes
3/3/2022 16 14 31	Yes	Yes	Yes	Yes
3/3/2022 16 18 28	Yes	Yes	Yes	Yes
3/3/2022 16 18 47	Yes	Yes	Yes	Yes
3/3/2022 16 24 45	Yes	Yes	Yes	Yes
3/3/2022 16 28 53	Yes	Yes	Yes	Yes
3/3/2022 16 32 41	Yes	Yes	Yes	don't know
3/3/2022 16 35 45	Yes	Yes	Yes	Yes
3/3/2022 16 40 22	Yes	Yes	Yes	Yes
3/3/2022 16 40 29	Yes	Yes	Yes	Yes
3/3/2022 16 44 04	Yes	Yes	Yes	Yes
3/3/2022 16 46 15	Yes	don't have a son in 7th or	Yes	Yes
3/3/2022 16 47 54	Yes	Yes	Yes	Yes
3/3/2022 16 48 38	Yes	Yes	Yes	Yes
3/3/2022 16 53 05	Yes	Yes	Yes	Yes
3/3/2022 16 54 55	Yes	Yes	Yes	Yes
3/3/2022 17 00 09	Yes	Yes	Yes	Yes
3/3/2022 17 04 26	Yes	Yes	Yes	Yes
3/3/2022 17 04 34	Yes	Yes	Yes	Yes
3/3/2022 17 05 04	Yes	Yes	Yes	Yes
3/3/2022 17 06 01	Yes	Yes	Yes	Yes
3/3/2022 17 06 16	Yes	Yes	Yes	Yes
3/3/2022 17 08 07	Yes	Yes	Yes	don't know
3/3/2022 17 09 52	Yes	Yes	Yes	Yes
3/3/2022 17 12 38	Yes	Yes	Yes	Yes
3/3/2022 17 18 06	Yes	Yes	Yes	don't know
3/3/2022 17 23 56	Yes	Yes	Yes	Yes
3/3/2022 17 26 14	Yes	Yes	Yes	Yes
3/3/2022 17 26 16	Yes	Yes	Yes	Yes
3/3/2022 17 27 44	Yes	Yes	Yes	Yes
3/3/2022 17 32 40	Yes	Yes	Yes	Yes
3/3/2022 17 35 26	Yes	Yes	Yes	Yes
3/3/2022 17 36 37	Yes	Yes	Yes	Yes
3/3/2022 17 37 26	Yes	Yes	Yes	Yes
3/3/2022 17 44 51	Yes	Yes	Yes	don't know
3/3/2022 17 53 22	Yes	Yes	Yes	Yes
3/3/2022 17 55 28	Yes	Yes	Yes	Yes
3/3/2022 17 55 30	Yes	Yes	Yes	Yes
3/3/2022 17 58 20	Yes	Yes	Yes	Yes
3/3/2022 18 03 34	Yes	Yes	Yes	Yes
3/3/2022 18 06 15	Yes	don't have a son in 7th or	Yes	Yes
3/3/2022 18 10 52	Yes	Yes	Yes	Yes
3/3/2022 18 14 17	Yes	Yes	Yes	Yes
3/3/2022 18 24 19	Yes	Yes	Yes	Yes
3/3/2022 18 24 29	Yes	Yes	Yes	Yes
3/3/2022 18 26 25	Yes	Yes	Yes	Yes
3/3/2022 18 31 29	Yes	Yes	Yes	don't know
3/3/2022 18 39 04	Yes	Yes	Yes	Yes
3/3/2022 18 43 18	Yes	Yes	Yes	Yes
3/14/2022 11 21 25	'm not sure	Yes	Yes	Yes
5/19/2023 16 25 12	Yes	Yes	Yes	Yes
5/20/2023 7 50 23	Yes	Yes	Yes	Yes
5/20/2023 9 45 12	Yes	Yes	Yes	Yes
5/20/2023 9 50 35	Yes	Yes	Yes	Yes

Timestamp	Based on your experience with Vertus High School, if Vertus had a middle school, would you enroll your son?	If you have a younger son, would you send him to Vertus in 7th and 8th grade?	Do you think Rochester would benefit from a Vertus Middle School?	Do you think your son would have been better prepared for high school if he could have attended 7th and 8th grade at Vertus?
5/20/2023 9 51 08	Yes	don't have a son in 7th or	Yes	Yes
5/20/2023 9 51 42	Yes	Yes	Yes	Yes
5/20/2023 9 53 33	Yes	Yes	Yes	Yes
5/20/2023 10 00 54	Yes	Yes	Yes	Yes
5/20/2023 10 03 27	Yes	Yes	Yes	don't know
5/20/2023 10 08 33	Yes	Yes	Yes	Yes
5/20/2023 10 24 34	Yes	Yes	Yes	Yes
5/20/2023 10 26 24	Yes	Yes	Yes	Yes
5/20/2023 10 27 17	Yes	No	Yes	No
5/20/2023 10 44 08	Yes	don't have a son in 7th or	Yes	Yes
5/20/2023 10 48 04	Yes	Yes	Yes	Yes
5/20/2023 11 03 16	Yes	Yes	Yes	Yes
5/20/2023 11 05 28	Yes	Yes	Yes	Yes
5/20/2023 11 43 23	Yes	Yes	Yes	Yes
5/20/2023 12 22 15	Yes	Yes	Yes	Yes
5/20/2023 12 23 09	Yes	Yes	Yes	Yes
5/22/2023 14 01 03	I'm not sure	don't have a son in 7th or	Yes	Yes
5/22/2023 17 05 52	Yes	Yes	Yes	Yes
5/22/2023 17 06 42	Yes	Yes	Yes	Yes
5/23/2023 12 04 14	Yes	Yes	Yes	Yes
5/31/2023 11 25 54	Yes	Yes	Yes	Yes
6/3/2023 14 50 40	Yes	Yes	Yes	Yes
6/20/2023 14 19 03	Yes	Yes	Yes	Yes
6/21/2023 12 38 10	Yes	Yes	Yes	Yes
1/26/2024 7 46 08	Yes	Yes	Yes	Yes
2/7/2024 15 30 16	No	No	No	No
3/18/2024 11 06 38	Yes	Yes	Yes	Yes
4/19/2024 21 41 27	Yes	Yes	Yes	don't know
5/16/2024 17 02 22	No	No	No	No
12/4/2024 10 01 59	Yes	Yes	Yes	Yes
3/6/2025 15 22 04	Yes	No	No	Yes

Vertus Charter Middle School

March 29, 2025

Open House

Timestamp	Would you support the addition of a middle school (grades 6–8) to Vertus High School in Rochester, NY?	If Vertus were to open a middle school, would you consider enrolling your child or recommending it to other families?
3/28/2025 14:05:56	Yes	Yes
3/28/2025 14:06:36	Yes	Yes
3/28/2025 14:06:44	Yes	Yes
3/28/2025 17:33:38	Yes	Yes
3/28/2025 18:36:44	Yes	Yes
3/29/2025 8:14:33	Yes	Unsure
3/29/2025 8:14:47	Yes	Yes
3/29/2025 8:32:15	Yes	Yes
3/29/2025 9:10:28	Yes	Yes
3/29/2025 9:13:35	Yes	Yes
3/29/2025 9:31:32	Yes	Yes
3/29/2025 9:31:54	Yes	Yes
3/29/2025 9:32:04	Yes	Yes
3/29/2025 9:34:16	Yes	Yes
3/29/2025 9:37:04	Yes	Yes
3/29/2025 9:41:20	Yes	Yes
3/29/2025 10:00:07	Yes	Yes
3/29/2025 10:01:04	Yes	Yes
3/29/2025 10:16:07	Yes	Yes
3/29/2025 10:28:59	Unsure	Yes
3/29/2025 10:29:44	Yes	Yes
3/29/2025 10:30:03	Yes	Yes
3/29/2025 10:56:52	Yes	Yes
3/29/2025 10:57:06	Yes	Yes
3/29/2025 11:07:41	Yes	Yes
3/29/2025 11:15:57	Yes	Yes
3/29/2025 11:23:14	Yes	Yes
3/29/2025 11:42:08	Yes	Yes
3/29/2025 11:49:11	Yes	Yes
3/29/2025 12:23:08	No	No

3/29/25  
Open  
House

Vertus Charter Middle School

August 24, 2024

Soul Music Festival

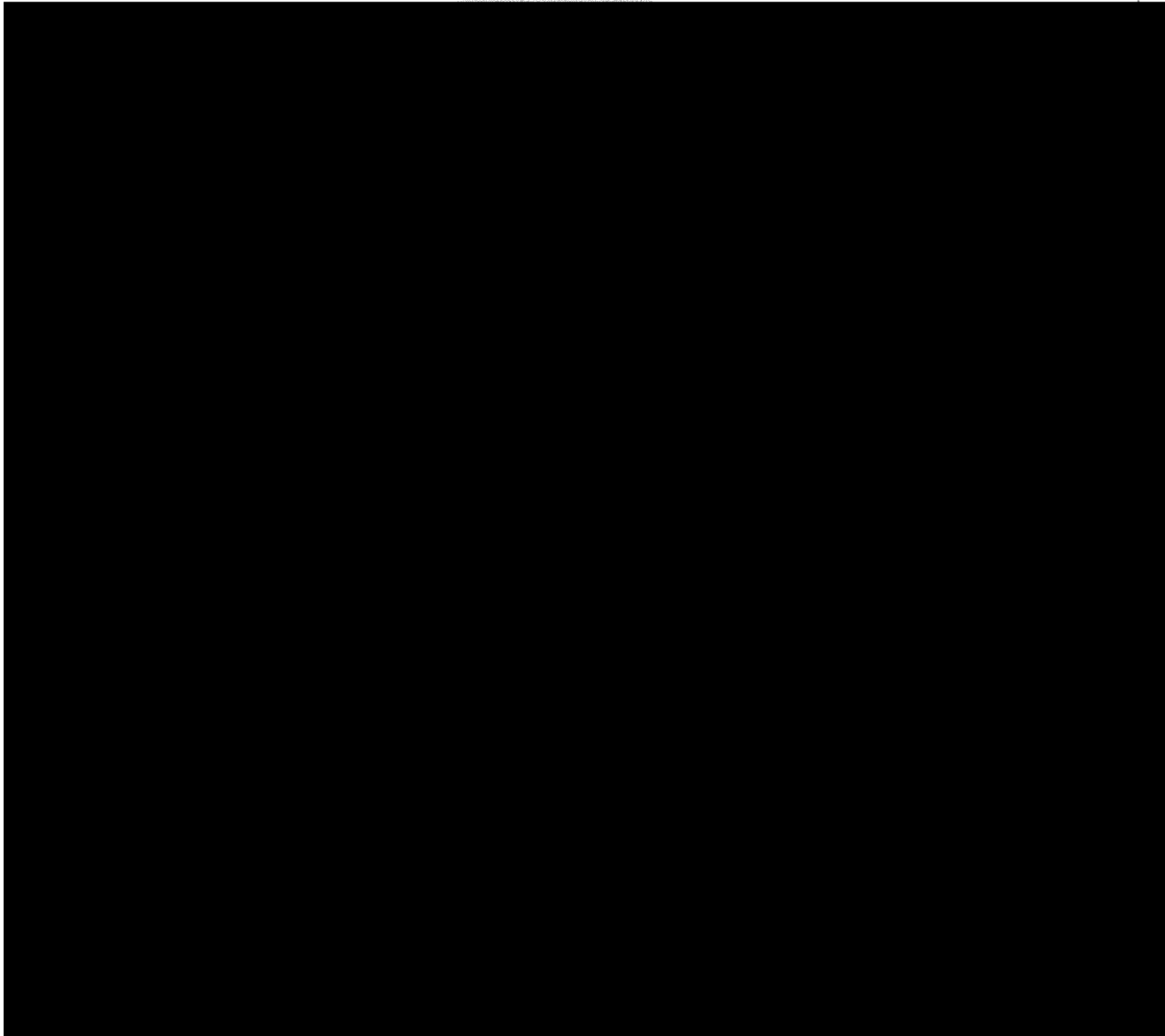
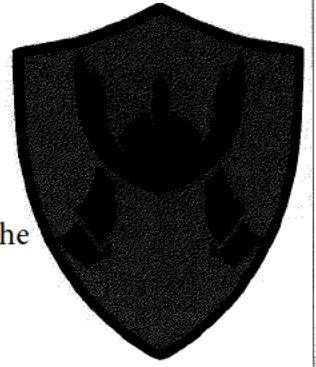


Soul Music Fest.

**Would Rochester benefit from a  
Vertus Middle School?**



This is a copy of the petition we asked individuals to complete at the Soul Music Festival. Over 150 individuals signed the petition indicating support for the middle school.



Vertus Charter Middle School

June 03 - 29, 2025

Recent Survey Results

(posted on Social Media websites and Graduation)

Timestamp	Do you think Vertus has a strong reputation for supporting the academic and character development of young men?	Would you recommend Vertus to other families based on your current knowledge or experience?	Have you heard any concerns or criticisms about Vertus that make you question expansion?	If Vertus added a middle school, would you want to be involved in helping shape its design or programming?
6/3/2025 17:32:28	Yes			
6/9/2025 8:32:10	Yes			
6/9/2025 8:32:40	Yes			
6/9/2025 8:33:12	Yes			
6/9/2025 8:33:56	Yes			
6/9/2025 8:34:21	Yes			
6/9/2025 8:34:45	Yes			
6/9/2025 8:35:13	Yes			
6/9/2025 8:36:10	Yes			
6/9/2025 8:36:45	Yes			
6/9/2025 8:37:50	Yes			
6/9/2025 8:38:20	Yes			
6/9/2025 8:38:56	Yes			
6/20/2025 9:26:19	Yes	Yes	No	Yes
6/20/2025 9:26:48	Yes	Yes	No	Yes
6/20/2025 9:27:08	Yes	Yes	No	Yes
6/20/2025 9:27:32	Yes	Yes	Yes	Yes
6/20/2025 9:27:57	Yes	Yes	No	Yes
6/20/2025 9:28:19	Yes	Yes	No	Yes
6/20/2025 9:28:42	Yes	Yes	Yes	Yes
6/20/2025 9:29:06	Yes	Yes	No	Yes
6/20/2025 9:29:28	Yes	Yes	Yes	Yes
6/20/2025 9:29:47	Yes	Yes	No	Yes
6/20/2025 9:30:15	Yes	Yes	No	Yes
6/20/2025 9:30:34	Yes	Yes	No	Yes
6/20/2025 9:31:12	Yes	Yes	No	Yes
6/20/2025 9:31:37	Yes	Yes	Yes	Yes
6/20/2025 9:31:57	Yes	Yes	No	Yes
6/20/2025 9:32:22	Yes	Yes	No	Yes
6/20/2025 9:32:40	Yes	Yes	No	No
6/20/2025 9:33:03	Yes	Yes	No	Yes
6/20/2025 9:33:43	Vertus is a great school	Yes	No	Yes
6/21/2025 12:00:56	Yes	Yes	No	Yes
6/21/2025 12:35:17	Yes	Yes	Yes	Yes
6/21/2025 12:37:52	Yes	Yes	No	Yes
6/21/2025 12:46:59	Yes	Yes	No	Yes. [REDACTED] 2022 Graduate
6/21/2025 12:57:00	Yes	Yes	Yes	No
6/21/2025 12:57:44	Yes	Yes	No	Yes
6/21/2025 13:01:58	Yes	Yes	No	No
6/21/2025 13:03:19	Yes	Yes	No	Yes
6/21/2025 13:15:52	Yes	Yes	No	Maybe
6/21/2025 13:20:06	Yes	Yes	No	Maybe
6/21/2025 13:32:23	Yes	Yes	No	Maybe
6/21/2025 13:39:49	Yes	Yes	No	Yes
6/21/2025 13:43:37	Yes	Yes	No	Yes
6/21/2025 13:54:12	No	Yes	No	Yes
6/21/2025 14:01:41	Yes	Yes	No	I will sign my son up.
6/21/2025 14:15:57	Yes	Yes	No	No
6/21/2025 14:39:44	Yes	Yes	No	Yes
6/21/2025 14:54:41	No	No	Yes	No
6/21/2025 15:03:33	Yes	Yes	No	Yes
6/21/2025 15:09:49	Yes	Yes	No	Yes
6/21/2025 15:43:48	Yes	Yes	Maybe	No
6/21/2025 18:30:05	Yes	Yes	No	Yes
6/21/2025 19:35:14	Yes	Yes	No	Yes
6/21/2025 19:56:58	Yes	No	No	Yes
6/21/2025 20:00:22	No	No	Yes	No
6/21/2025 21:14:43	Yes	Yes	No	Maybe
6/21/2025 23:34:50	Yes	Yes	No	Yes
6/22/2025 0:07:50	Yes	Yes	No	Yes
6/22/2025 10:09:18	Yes	Yes	No	Yes
6/22/2025 18:08:28	Yes	Yes	No	Yes
6/23/2025 15:59:15	Yes	Yes	No	Yes
6/23/2025 18:28:10	Yes	Yes	No	Maybe
6/23/2025 22:01:37	Yes	Yes	No	Yes
6/28/2025 10:39:48	Yes	Yes	No	Yes
6/28/2025 12:32:37	Yes	Yes	No	Yes
6/29/2025 16:19:33	Yes	Yes	No	Yes

Vertus Charter Middle School

June 07, 2025

Aberdeen Square Fair

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

COMMUNITY, DISCIPLINE, UPLIFTING

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

NOTHING BAD TO SAY.

# Vertus Junior High Feedback

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As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

Safety, Learning

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

Don't know

# Vertus Junior High Feedback

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As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

*Quality of education*

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?



# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

Leadership guidance  
Positive role models

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

N/A

# Vertus Junior High Feedback

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As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

To learn

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?



Education

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

Not Now!

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

Safety

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

N/A



# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

Safety, Quality education, from  
a cultural lens, and staff  
that cares.

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

women lol.

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

The people they'll be around and the new things they'll learn

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

No

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

Teachers

Curriculum

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

Keep doing what you're doing. Great Job.



# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

*The quality of education*

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

*Middle School*

# Vertus Junior High Feedback

Vertus Middle is designed to serve at-risk young men in Rochester, a city facing deep and persistent educational challenges. The proposed school will focus on students with very low levels of academic readiness, histories of significant disciplinary issues, and students who have struggled to succeed in traditional school settings. Currently, 95% of Vertus students live in the city of Rochester, and 86% are classified as economically disadvantaged—a demographic we expect the middle school to mirror. Vertus Middle will offer an alternative, supportive educational environment for young men navigating difficult life circumstances, including periods of homelessness or food insecurity, exposure to violence or addiction, and involvement with the criminal justice system.

As a member of the community, does the Vertus Middle School interest to you as something new when considering the existing public school options in the area?

☒ Yes

☐ No

☐ Maybe

☐ Other:

What is most important to you when considering where you/your child goes to school?

*Children need this program  
+ help*

Is there anything missing from the current Vertus School structure/ mission that you would like to see implemented?

Vertus Charter Middle School

Letters of Support



**City of Rochester**

185 Exchange Boulevard  
Rochester, New York 14614  
[www.cityofrochester.gov](http://www.cityofrochester.gov)



Rochester, NY  
Police Department

To whom it may concern,

I am writing this letter to show our continued support of, Vertus High school, and all they are doing for not only our youth, but our community as a whole. My name is Michelle Calderon, I am the recruiter for the Rochester Police Department. I was contacted by, Joe Carter, in the summer of this year to come speak and meet their students. Mr. Carter shares our vision of repairing relationships within the community and the officers' that serve them. One of his goals is to build trust; therefore, he plans events, such as the push-up challenge to engage the students in a positive activity with police. These activities help to show the students, we are just like them. Forging these relationships is so important and a big step in working towards building trust. On our first visit, Mr. Carter, took us on a tour of the building, and he was approached by several students, all of which he knew by name. Since then, I've been invited to Vertus several times, and each time the students seem to engage us more in conversation. Just walking through the hallway, I was immediately impressed by their pride in all of their students, which was evident by all the pictures and awards. It's obvious he's very passionate about each and every student. I was also impressed by the students being enrolled in school all year long. In my opinion, keeping kids occupied with studies and activities keeps them out of trouble. The last meeting, I noticed all the labs were now named with different themes, such as colleges, military and law enforcement. Again, it goes to show how they are trying their best to instill in each student the importance of an education, as well as several career opportunities afforded to them. I honestly can't recommend this school enough to people I speak with in the community. I graduated from a City of Rochester school, and feel I would have benefited greatly from a program like this, where teachers and staff are so involved. In closing, I am in full support of Vertus expanding to add lower grade levels, because I feel reaching these young men early is so crucial in their development. Thank you, for your consideration.

**Officer Michelle Calderon-Recruitment**

Rochester Police Department  
Community Affairs Bureau  
Office (585) 428-7619



September 28, 2021

Troop E | New York State Police  
1569 Rochester Road  
Farmington NY 14425



Dear Mr. Carter:

The New York State Police has had the pleasure to personally work and interact with the Vertus High School staff and students. We have seen their determination and enthusiasm to conquer many challenges that have come their way through out the school year. We recognize that not every young adult will learn and develop the same way. This school has accepted each student as a special individual with talents that have yet to be uncovered. The staff shows compassion and love to challenge each student to reach their highest potential.

We, here at Troop E in SP Canandaigua of the New York State Police will continue to support your determination to expand the Vertus Community by adding a middle school. Your desire to reach the youth at an earlier age is commendable. Any early positive impact especially academically, would greatly impact the development of a youth's future and assets.

We proudly attended a Vertus High School event where the staff and students participated in an interactive push up competition. From our experience, it is evident that all staff members welcomed every student with open arms and were invested in their education, social and emotional well-being. It was also shared with us how staff are aware of students' home life and will intervene if needed. An example of this was shown by staff transporting students to and from school because of student's transportation hardships. It is dedication like this that will impact these young men to become caring and responsible future citizens who will continue to care about their community.

Sincerely,

Trooper Nicole Drew  
Trooper Diane Caraballo  
Trooper Jeffrey Gmerek  
Recruitment Unit





## BOYS & GIRLS CLUBS OF ROCHESTER

500 GENESEE STREET ROCHESTER, NY 14611 (585) 328-3077 FAX (585) 328-5863 [www.bgcrochester.org](http://www.bgcrochester.org)

October 7, 2021

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Dwayne K. Mahoney  
Executive Director

To Whom It May Concern:

It is with great pleasure that I write this letter in full support of Vertus High School's efforts to add 7<sup>th</sup> and 8<sup>th</sup> grades to an already flourishing high school aligned with best practices as defined by governing charters. Vertus has built a rigorous academic environment preparing leaders of character for the community and the workplace.

Much like the Boys & Girls Clubs of Rochester Vertus High School focuses on providing strong academic support, solid adult mentoring and providing creative opportunities for students to pursue their individual interests and ultimately achieve success. The Boys & Girls Clubs of Rochester has had Vertus High School students as Club members. The young men have been leaders in the Club, participating in Keystone; the Club's service group for teens, actively volunteering at special events and serving as caring and outstanding role models for younger members.

The mission and approach of both the Club and Vertus are similar – work to ensure students/members are academically prepared to continue to higher education and promote personal growth in an environment with caring professionals.

In conclusion I fully support the efforts of Vertus High School as they seek to grow the high school to include grades seven and eight as part of the school's academic development and positive influence with young men in our community.

Sincerely,

A black rectangular box redacting the signature of Dwayne K. Mahoney.

Dwayne K. Mahoney  
Executive Director



A United Way Agency



**FOR YOUTH DEVELOPMENT  
FOR HEALTHY LIVING  
FOR SOCIAL RESPONSIBILITY**

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My name is Ken Lee, and I am the Urban District Operations Director for the YMCA. In my role I have had the opportunity to visit several schools in the Rochester area. So far Vertus high school has displayed the most fervent desire to inspire and motivate young people to succeed. During my visit they made a concerted effort to encourage, acknowledge and include all of their students to develop courage, leadership, and responsibility. The staff was committed to the students and the students walked in the halls with a sense of pride and respect for one another.

I left the school thinking that it would be great if more students were able to attend a school like that. I am aware now that they are seeking to expand their population of students to the 7<sup>th</sup> and 8<sup>th</sup> grade level. This would be a great opportunity to introduce students to such a supportive environment earlier in their educational years. It appears to be a natural progression to allow a school like Vertus to increase their ability to serve, save and inspire teens in the Rochester area.

I am in full support of the Vertus High school serving more young people because what they are doing is in full alignment with the cause to display caring, honesty, respect, and responsibility at the YMCA.

Sincerely

Ken Lee



Shaun Nelms, EdD



August 9, 2023

To whom this may concern,

I am writing to express my wholehearted support for Vertus Charter School and its exceptional commitment to educating and empowering young men in Rochester, NY. Vertus Charter School has consistently demonstrated an unwavering dedication to its students by providing them with valuable and life-changing resources that have a profound impact on their personal growth and development.

The leaders of Vertus Charter School have established an impressive network of support that extends beyond the classroom, fostering a sense of community and partnership. This commitment is truly commendable and serves as a testament to the school's genuine concern for the well-being and success of its students.

One of the hallmarks of Vertus Charter School is its innovative character curriculum, which encourages students to explore the virtues of courage, leadership, and responsibility on a daily basis. This focus on character development instills important values that extend far beyond academics and equips students with the skills they need to thrive as responsible and capable individuals.

The recognition of character growth through weekly awards further reinforces a culture of excellence and encourages students to strive for their personal best. Additionally, the diverse range of opportunities offered, including sports, field trips, extracurricular activities, college courses, and work opportunities, empowers students to gain a holistic understanding of the world around them and nurtures their growth as future leaders.

Vertus Charter School has undeniably made a significant positive impact on the lives of its students and the broader community. It is with great enthusiasm that I wholeheartedly support the continued efforts of Vertus Charter School to provide an exceptional education and transformative experiences for the young men of Rochester, NY.

Sincerely,  
Shaun Nelms, EdD  
Educator & Advocate



16 East Main Street, Suite 925 | Rochester, NY 14614 | [EDceptional.org](http://EDceptional.org)

May 29, 2025

Lisa Long, Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

Dear Ms. Long,

I am writing in support of the Vertus Charter School application to add grades 7 and 8 to their charter. I believe the school has already proved that it works well at the high school level, and I see no reason why the many benefits of its model would not help junior high school students too.

One of the challenges at Vertus is that incoming students are so far behind where they should be that the school must spend a lot of effort on catching students up. If Vertus were to get the students 2 years earlier, the school could feed them into high school better prepared for a rigorous high school curriculum. My organization, EDceptional Inc. has sponsored a series of visits by two teacher coaches this past year to help Vertus teachers with their pedagogy, and they are helping the school revamp its curriculum this summer. We know that the students are smart enough to go on to great success in life; the school just needs more time to prepare them.

EDceptional also runs the [GoodSchoolsRoc.org](http://GoodSchoolsRoc.org) website that informs parents of their charter school choices and provides an online application for all the schools. We had 124,000 visits to our website last year, so parents are clearly eager to find a good school for their children, and more than 6,000 students applied for the approximately 2,000 available seats. Last year there were only 200 seats offered by charter schools for students going into the 7<sup>th</sup> grade, but 600 students applied, and only 80 seats were offered for 8<sup>th</sup> grade, while more than 400 students applied. Vertus should have no trouble filling the seats of the junior high; Rochester's parents need these seats for their children.

Sincerely,

A solid black rectangular box used to redact the signature of Bryan D. Hickman.

Bryan D. Hickman

Vice President, EDceptional, inc.

June 9, 2025

Lisa Long, Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

Dear Ms. Long:

On behalf of Greater Rochester Chamber, I am writing to express our strong support for Vertus High School's efforts to secure ownership of the building they currently occupy. As an all-boys charter school located in the City of Rochester, Vertus has become an anchor institution within our community, providing life-changing educational opportunities to young men who are too often overlooked in traditional systems.

We believe deeply in Vertus's mission of *Developing Men of Character*, and we have seen firsthand the transformative impact this school has had not only on its students, but on families and neighborhoods across Rochester. Over the last ten years, Vertus has demonstrated consistent growth, academic rigor, and a deep commitment to mentorship—qualities that are reflected in its impressive outcomes, including an 85% graduation rate and 80% average attendance.

Vertus has proven that it can succeed in helping young men thrive, and we fully support their efforts to expand this model to serve junior high students. Deepening their reach will only strengthen the school's already considerable contribution to Rochester's long-term economic and social health.

Securing permanent ownership of their building is a logical and necessary step for Vertus to continue and expand this critical work. As a Chamber focused on building a stronger, more inclusive regional economy, we see investment in Vertus's future as an investment in Rochester's future.

We are proud to stand with Vertus High School in this endeavor.

Please do not hesitate to reach out should you have any questions.

Thank you,



Robert J. Duffy  
President/CEO



6367 Dean Parkway Ontario, NY 14519  
P: 585-265-1020 F: 585-265-0793 E: [sales@optimaxsi.com](mailto:sales@optimaxsi.com)  
[www.optimaxsi.com](http://www.optimaxsi.com)

Lisa Long, Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

### **Letter of Support for Vertus Charter School Junior High Application**

Dear Executive Director Long,

I am writing in enthusiastic support of Vertus Charter School's application to expand its model by opening a junior high school. As a longstanding advocate for educational innovation and equity in Rochester, I have witnessed firsthand the powerful and positive impact Vertus has made on the lives of its students and the broader community.

Vertus's mission—to develop Men of Character—has never been more vital. Over the past decade, the school has consistently delivered strong outcomes, including an average 85% graduation rate and 80% attendance, which is particularly notable given the complex challenges facing many of its students. Vertus combines high expectations with deep personal support, and the results speak for themselves.

By extending its reach to serve junior high students, Vertus will be able to engage young men at an earlier and even more formative stage of their development. This expansion will allow the school to build character, academic skills, and habits for success before students enter high school, setting a stronger foundation for long-term achievement.

Additionally, Vertus's growing emphasis on workforce development and Career and Technical Education aligns perfectly with the region's priorities. By integrating these pathways into a junior high model, Vertus is preparing students not only to graduate, but to thrive in meaningful careers.

Having been a part of the school's steady growth and evolution over the past 10 years, I am proud of its leadership, vision, and confident in our capacity to scale this model with the same integrity and excellence already demonstrated.

I urge you to support Vertus in this next chapter. Our young men—and our community—will be stronger for it.

Sincerely,

A black rectangular box redacting the signature of Michael P. Mandina.

Michael P Mandina  
Chairman, Corporate Fellow  
Optimax Systems, Inc.



**June 15, 2025**

Lisa Long  
Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

Dear Ms. Long,

It is with great enthusiasm that I offer my full support for Vertus Charter School's application to expand their model by launching a junior high school. As Director of Wegmans' Work-Scholarship Program, and a former Vertus board member, I've had the privilege of working alongside the school since its founding, and I've seen up close the powerful impact it has had on hundreds of young men in Rochester.

Our organization has supported youth development and workforce readiness for decades, using a model rooted in mentorship, relationship-building, structure, and accountability. From the very beginning, we recognized that Vertus's approach closely mirrored ours with their dedicated preceptors, year-round learning model, and commitment to character education. It's no surprise that many of the young men we work with who attend Vertus thrive.

The school's outcomes are not just promising, they are proven, with an average **85% graduation rate**, consistent **attendance**, and a culture of high expectations and support that reflects the values we share. More than that, Vertus meets young men where they are, provides structure and mentorship, and walks alongside them toward a strong future.

I have no doubt that opening a junior high school will expand their impact in transformative ways. Early intervention is critical. Reaching boys at a younger age with this model will create stronger academic foundations, healthier habits, and deeper trust with adult mentors.

I urge you to approve this new charter and help ensure that Vertus can continue to serve as a critical partner in Rochester's education and workforce ecosystem. Their leadership, results, and values make them one of the most effective institutions I've had the privilege to work with.

Thank you for your consideration.

Warmly,  
**Ty Kelly**  
Director, Work-Scholarship Program  
Wegmans Food Markets, Inc.

**1500 Brooks Avenue • P.O. Box 30844 • Rochester, New York 14603-0844**  
**(585) 328-2550 • (800) WEGMANS (934-6267) Fax: (585) 429-3625**  
**[www.wegmans.com](http://www.wegmans.com)**



June 15, 2025

Lisa Long, Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

Dear Ms. Long,

As a lifelong resident and business leader in Rochester, I am pleased to write in strong support of Vertus Charter School's application to open a junior high school. At Wegmans, a family-founded organization dedicated to workforce development in Rochester, we have seen firsthand how a work-scholarship model grounded in mentorship, personalized relationships, and accountability shapes young lives. We believe in the Vertus model and proudly have 35 Vertus students currently working in our stores.

Vertus's mission, **Developing Men of Character**, mirrors the core values we foster in our own scholarship program. Through their innovative preceptor model and year-round academic structure, they've enabled young men to not only succeed academically but also mature as intentional, workforce-ready individuals.

The results speak volumes:

- **85% average graduation rate.**
- A strong culture of high expectations, character development, and one-on-one support.
- Meaningful connections to the Rochester community and local employers, which includes many of their students participating in our work-scholarship program year after year. Extending this model to empower earlier instruction is both logical and strategic. Junior high is a critical developmental phase, embedding structure, encouragement, and mentorship at that stage will significantly deepen Vertus's lasting impact on its students and, in turn, our local workforce pipeline.

Furthermore, as New York State places a growing emphasis on Career and Technical Education (CTE), Vertus's approach exemplifies early CTE integration by promoting real-world exploration, personalized academics, and long-term planning. Their expansion is aligned with your office's goals and will ensure a robust return on investment for our community.

I respectfully urge the NYSED to approve Vertus's junior high charter application. Thank you for considering this opportunity to invest in the future of Rochester's young men.

Sincerely,

**Danny Wegman**  
Chairman, Wegmans Food Markets Inc.

Wegmans Food Markets Inc.

# KENNETH A. MARVALD

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June 16, 2025

Lisa Long  
Executive Director  
NYSED Charter School Office  
New York State Education Building  
89 Washington Avenue  
Albany, NY 12234

Re: Letter in Support of Vertus Charter School to Serve Junior High Students

Dear Ms. Long,

It is with great enthusiasm that I offer this letter of support for the expansion of Vertus Charter School to serve junior high students.

For context, I spent about a year of my life (some 10+ years ago now) as part of the team that philanthropically acquired: (i) the Hoover Road School (formerly the Greece Odyssey Academy, a 100,000+ square foot world-class school facility on 8.6 acres in the Town of Greece) from the Greece Central School District, now home to two charter schools, the Discovery Charter School and YWCP, and (ii) the Nazareth Academy School and Campus at 1001 Lake Avenue in Rochester from the Sisters of St. Joseph, now home to some 600 students at the Exploration Elementary Charter School for Science & Technology, University Preparatory Charter School for Young Men Grade 6-8, and EnCompass Navigation (a holistic pre-K through graduation pathway which integrates year-round academics, college and career development, and wraparound supports).

I have had the privilege of being connected to Vertus since its founding and have witnessed firsthand the remarkable outcomes this school has achieved, not only for the young men it serves but for the Rochester community as a whole. I have been part of multiple donations supporting Vertus, including most recently paying for half of a new school bus and setting up an emergency fund to help students with dire needs.

Vertus's mission, *Developing Men of Character*, is more than a motto; it is a lived commitment backed by four pillars that shape every student's experience: strong relationships, personalized year-round academics, character education, and career preparation. These values are deeply aligned with my own, which is why I have been honored to contribute both my personal resources and those of a foundation led by my late mentor and former boss to help meet critical student needs, including transportation and emergency support.

Vertus has consistently demonstrated what is possible when young men are held to high expectations and given the tools to succeed. An average 85% graduation rate and strong attendance across years are more than metrics, they are proof that this model works. I have seen the impact of this work in the lives of students who are graduating with purpose and entering college, careers, and service with the confidence and preparation to succeed.

Expanding this model to reach students earlier, starting in junior high, will only deepen that impact. The middle school years are pivotal, and bringing Vertus's proven structure and values to that stage of development is the next logical and necessary step. Our city will benefit for generations to come from young men who have been guided by this mission from a younger age.



Kenneth A. Marvald  
Page 2 of 2

I strongly support this expansion and urge you to do the same. Our community needs more of what Vertus offers: more opportunity, more structure, more hope; and this expansion is a critical way to deliver on that promise.

Sincerely,

A solid black rectangular box used to redact the signature of the sender.

## **Attachment 3: Course Descriptions**

### **English Language Arts (ELA)**

Literacy is a priority at Vertus Middle, where most incoming students arrive significantly behind grade level. To address this, students will engage daily with a high-quality ELA curriculum such as Amplify ELA, aligned to NYSED's Next Generation Learning Standards and grounded in the Science of Reading. Instruction will focus on explicit vocabulary development, fluency, structured routines, and comprehension strategies. Students will engage in a range of reading experiences and texts, write (evidence-based arguments, informative/explanatory texts, narratives, etc.), and develop critical thinking skills through daily lessons and a dedicated Literacy Lab to strengthen foundational reading. As students progress through grade levels, they will encounter increasing text complexity and gain proficiency in key domains: Conventions of English, Knowledge of Language, Comprehension and Collaboration, Research, and Integration and Presentation of Ideas.

### **Mathematics**

Vertus Middle's math program includes Math 7, Math 8, and Pre-Algebra for all students, with Algebra I available to advanced students who demonstrate readiness through diagnostic and interim assessments. Using rigorous curricula like EngageNY/Eureka Math, eMath Instruction, and Illustrative Mathematics, students will build strong conceptual understanding and problem-solving skills. Adaptive tools like Delta Math and GeoGebra will provide targeted practice and extend learning for students ready for accelerated content. Throughout the program, students will develop fluency in key mathematical domains, including ratios and proportional reasoning, the number system (with all operations), expressions and equations, geometry, and statistics and probability. By eighth grade, students will engage with more complex mathematical problems and have increased opportunities to apply their learning to real-world scenarios, preparing them for success in high school math and beyond.

### **Science**

Vertus Middle's science curriculum for grades 7–8 will follow New York State Intermediate Science Standards.

- Grade 7 will focus primarily on Life Science, exploring cells, genetics, human body systems, ecosystems, and the impact of environmental factors. Students will investigate how organisms grow, reproduce, and interact with their environment using inquiry-based labs and Edgenuity's multimedia resources.
- Grade 8 will shift to Physical Science, covering topics like forces and motion, energy, waves, and basic chemistry. Students will apply scientific practices to design experiments, collect and analyze data, and explain real-world phenomena. Edgenuity's embedded assessments, labs, and UDL supports ensure all students can access grade-level science content.

### **Social Studies**

Social studies instruction will also use Edgenuity to deliver engaging, standards-based content.

- Grade 7 covers early U.S. history from pre-Columbian societies through the Civil War and Reconstruction. Students examine historical events, geography, government, and economics, and connect local NYS developments to national trends.
- Grade 8 continues from Reconstruction through the present, exploring industrialization, immigration, social reform, civil rights, and the U.S. as a global power. Students analyze primary sources, make historical connections, and develop civic literacy.

### **Seminar**

Seminar is an advisory course focused on building character, leadership, literacy skills, and workplace readiness. Led by Preceptors, Seminar combines study skills, growth mindset, reflective writing, and public speaking. Each student will maintain an Individual Life Plan to set goals and track progress. The curriculum will draw from Expeditionary Learning, Tuckman's learning strategies, the KIPP character framework, and national career readiness standards.

### **Career & Technical Education (CTE)**

Students will explore career pathways and workplace skills through Project Lead the Way (PLTW) and related hands-on projects. CTE experiences are integrated into Seminar and Learning Labs, preparing students for future high school pathways and real-world problem-solving.

### **Physical Education & Health**

PE and Health instruction focuses on lifelong fitness, teamwork, wellness, and personal goal-setting, aligned to NYSED requirements.

### **Arts (Visual Arts, Music, Rotations)**

Students engage in visual arts, music, or rotating electives to develop creative expression, cultural literacy, and collaboration skills.

### Attachment 3a: A “Day in the Life”: Vertus Middle Student

**7:30 AM:** Anthony, a 7th grader, walks through the cafeteria doors to pick up his free breakfast — He fists pumps and joins peers at a table and listens to a story about a weekend basketball rematch. A staff member stops by to check in, greeting him with his name, and reminds him that he’s going to give his mom a call to tell her about his updated i-Ready scores. At previous schools, no one ever called home with good news — or checked if he was even doing the work. They only called to tell her about negative things. His mom likes that now she always knows where he stands and isn’t worried to answer the phone when Vertus Middle is calling.

**8:00 AM:** He heads to Advisory with his Preceptor, Mr. Shaw — the caring adult who sticks with him from breakfast to dismissal. They set goals for the day, talk through what’s working, and talk about how to tackle what’s not. Before Vertus Middle, Anthony never set goals. School felt boring, no one seemed to care if he did his work, and he often didn’t. He missed days because he didn’t see the point. Now, showing up matters — and he knows Mr. Shaw will notice and hold him accountable if he doesn’t. He has clear goals that feel achievable, and he knows exactly what he’s working toward.

**8:18 AM** — Period 1: Monday starts with Math — always his hardest subject. At his old school, he’d just sit there, zone out, and fall further behind. No one explained things in a way that made sense, and he was too embarrassed to ask. At Vertus Middle, learning is different. It blends live teacher-led lessons, adaptive tools like Delta Math, and hands-on practice that lets Anthony move at his own pace. If he struggles, the system alerts Mr. Shaw and the teacher right away — not months later when it’s too late to catch up. Because intervention is normal here, he doesn’t feel singled out. If his data shows gaps, he goes to a dedicated math intervention class every other day with an Academic Intervention Specialist. Everyone expects him to get help — and get better.

**9:11 AM** — Period 2: Learning Lab: Science/Social Studies. Anthony logs into Edgenuity’s multimedia lessons, answers embedded quizzes and joins a small group for writing practice. When he hits unfamiliar words like *biodiversity*, his teacher pauses for a quick decoding break. They break the word into syllables, practice saying it together, and connect it to root words (a Science of Reading routine that builds decoding and vocabulary skills across content areas). At his old school, he’d just copy answers from a textbook and zone out. Here, real-time data keeps him engaged — and if he slips, someone steps in. The Learning Lab model means he can move ahead if he’s ready or spend more time on what’s hard — without feeling embarrassed. At his old school, he just copied answers from the book and hoped that no one noticed he didn’t get it. Here, there’s no hiding — but there’s no shame either.

On other days (twice a week), Anthony’s team shifts into Seminar — a character-based, SEL-focused class taught by Mr. Shaw. The lesson may start with a short nonfiction passage about a real person who overcame setbacks — connecting literacy to real life. He may write a short reflection, and then talk about how it connects to personal challenges.

**10:14 AM** — Period 3: ELA — a big focus at Vertus because so many students come in grade levels behind. At his previous school, he barely read anything — mostly worksheets — so he learned to fake it and hide. Now, he tackles complex stories using Amplify ELA, builds vocabulary, and writes daily. He also attends Literacy Lab every other day for fluency practice with Achieve3000 and Accelerated Reader 360. Anthony's teacher models annotation and text-based evidence strategies, then checks his understanding with short response writing. For kids like Anthony who didn't learn strong decoding skills before, this structured approach helps him build skills step by step instead of guessing at words. It's more reading than he's ever done, but for the first time he feels like he's getting better — and that someone notices.

**11:32 AM:** Lunchtime. Staff check in, model respectful interactions, and keep things calm. If Anthony has a conflict, he won't just get sent home like before. Instead, *Pathways to Success* helps him learn better behavior skills and fix the issue while staying in class — so he doesn't miss learning time. A staff member asks Anthony what he read today, giving him a chance to practice retelling (a strategy that reinforces comprehension). He feels strange new confidence here, explaining the story in his own words.

**11:55 AM** — Period 4: Learning Lab Intervention/Enrichment. This is where Anthony catches up on or accelerates with specific skills. Anthony works one-on-one with the AIS teacher to build reading fluency flagged in his last benchmark. Another student uses Mathigon Polypad to visualize a tough math problem. At his old school, if you were behind, you stayed behind. Here, help comes to you — every day.

**12:58 PM** — Period 5: PE — a break to move and reset. On other days, Health is addressed or he may attend art or library — things he never liked or cared much about at his old school.

**1:51 PM** — Period 6: Spanish today. Anthony practices greetings and gets feedback right away. On other days, he switches to Project Lead the Way — hands-on STEM projects that connect school to real jobs and keep him interested. His old school didn't talk about careers — just tests. Here, learning feels like it matters.

**2:44 PM** — Period 7: Advisory closes the day. Anthony's team regroups with Mr. Shaw to reflect on what went well and what needs work tomorrow. They plan next steps — he never leaves feeling lost. They update his Individual Life Plan so he can see his progress.

**3:00 PM:** Dismissal — Anthony stays for extra reading help and a game of intramural basketball. At his old school, he'd have gone home to do nothing. Here, staying late means catching up, staying connected, and believing tomorrow will be better.

## **A Day in the Life: Vertus Middle Teacher**

**7:15 AM:** Ms. Jones arrives early to check her Edgenuity and i-Ready dashboards. She scans Anthony's latest fluency scores and notices he struggled with multisyllabic words in yesterday's passage. She adjusts her Literacy Lab plan to include extra decoding practice and prepares a short phonics warm-up with structured, explicit, and focused on building foundational skills.

**7:30 AM:** She circulates through the cafeteria, greeting students, reminding them about today's Seminar topic on self-advocacy. Small check-ins reinforce workplace readiness skills: punctuality, responsibility, communication. At Vertus, showing up ready is part of becoming ready for life.

**8:00 AM:** Ms. Jones joins Advisory with Mr. Shaw's Learning Team. They run a quick goal-setting circle and share wins. She celebrates a student who moved up a Lexile band on Achieve3000. At Vertus, literacy growth is a daily, visible goal — not just something tested once a year. Staff model soft skills, such as “speaking up when you need support” — a simple but important workplace skill. They finish with a short reminder about teamwork and problem-solving.

**8:18 AM — Period 1:** Ms. Jones opens Math with a vocabulary preview and models solving percent problems step by step. While students work through real-world problems, she reminds them how precise calculation and double-checking work mirror real-life workplace tasks. She checks Anthony's progress — if he shows a problem, she provides immediate feedback.

**9:11 AM — Period 2:** In Learning Lab: Science/Social Studies, students complete an Edgenuity module on ecosystems. She observes, monitors progress, and steps in when support is needed.

**10:14 AM — Period 3:** ELA block Ms. Jones uses Amplify ELA's structured routine: daily phonics/word study for struggling readers, explicit vocabulary instruction for Tier 2 and Tier 3 words, and guided close reading of grade-level complex texts. She models annotation strategies, uses think-alouds to show how skilled readers make meaning, and breaks the class into leveled groups. Frequent checks for understanding and evidence-based responses keep every student engaged.

**11:32 AM:** Lunch. Ms. Jones checks in with a student who was off-task earlier. She uses a restorative conversation — calmly asking what happened, what the impact was, and what they'll do differently. The student apologizes to a classmate he interrupted. Ms. Jones praises the repair — showing students that accountability and respect are workplace habits too.

**11:55 AM — Period 4:** Literacy Lab Intervention/Enrichment. Ms. Jones partners with the AIS to deliver explicit, small group reading intervention. Students practice reading aloud with guided correction — building confidence and reading stamina.

**12:58 PM — Period 5:** In Collaboration Block, Ms. Jones meets with the Special Education Teacher and the AIS to review this week's intervention groups. Together, they compare i-Ready data, classroom formative checks, and Edgenuity progress to see which students need new goals or

adjustments in supports. They plan tailored small-group lessons for the next Literacy Lab and decide who will lead explicit decoding, who will handle comprehension scaffolds, and how to align supports with each student's IEP or RtI plan.

**1:51 PM — Period 6:** Prep time — Ms. Jones uses it to review i-Ready growth reports, adjust reading groups for the next week, and plan new decodable practice activities. She meets briefly with the AIS and Mr. Shaw to compare notes on students' progress and share strategies that align with Science of Reading routines across subjects.

**2:44 PM — Period 7:** Ms. Jones rejoins Advisory to help close the day. She encourages students to share reading wins and talks through reflection questions that tie back to goal setting and accountability — reinforcing that literacy success is a daily part of their personal growth.

**3:00 PM:** Dismissal — but Ms. Jones stays to run a small after-school reading group.



### Attachment 3c: Exit Standards

Vertus Middle is committed to ensuring that all students meet grade-level exit standards that are fully aligned with the New York State Education Department's Next Generation Learning Standards. Through a rigorous and supportive academic program, we prepare students in grades 7–8 with the knowledge, skills, and habits necessary for success in high school and beyond.

#### **Sample Exit Standards Grade 7 ELA** (See 6-8 Next Generation ELA Standards at a Glance<sup>1</sup>)

Mathematical Practices	
1. Make sense of problems and persevere in solving them.	5. Use appropriate tools strategically.
2. Reason abstractly and quantitatively.	6. Attend to precision.
3. Construct viable arguments and critique the reasoning of others.	7. Look for and make use of structure.
4. Model with mathematics.	8. Look for and express regularity in repeated reasoning.

In Grade 7, instructional time should focus on three areas: (1) developing understanding of and applying proportional relationships; (2) developing understanding of operations with rational numbers and working with expressions and linear equations; and (3) drawing inferences about populations based on samples. Please note that while every standard/topic in the grade level has not been included in this overview, all standards should be included in instruction.

1. Through their learning in the ***Ratios and Proportional Relationships*** domain, students:

- extend their understanding of ratios and develop understanding of proportionality to solve single- and multi-step problems;
- use their understanding of ratios and proportionality to solve a wide variety of percent problems;
- solve problems about scale drawings by relating corresponding lengths between the objects or by using the fact that relationships of lengths within an object are preserved in similar objects;
- graph proportional relationships and understand the unit rate informally as a measure of the steepness of the related line; and
- distinguish proportional relationships from other relationships.

2. Through their learning in the ***Number System*** and the ***Expressions, Equations, and Inequalities*** domains, students:

- develop a unified understanding of number, recognizing fractions, decimals (that have a finite or a repeating decimal representation), and percents as different representations of rational numbers;
- extend addition, subtraction, multiplication, and division to all rational numbers, maintaining the properties of operations and the relationships between addition and subtraction, and multiplication and division;
- explain and interpret the rules for adding, subtracting, multiplying, and dividing with negative numbers by applying properties of operations, and view negative numbers in terms of everyday contexts; and
- use the arithmetic of rational numbers as they formulate expressions and equations in one variable and use these equations to solve problems.

3. Through their learning in the ***Statistics and Probability*** domain, students:

- build on their previous work with single data distributions to compare two data distributions and address questions about differences between populations;
- begin informal work with random sampling to generate data sets and learn about the importance of representative samples for drawing inferences; and

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<sup>1</sup> <https://www.nysed.gov/sites/default/files/68elastandardsglance.pdf>

- extend previous understandings of simple probabilities in grade 6 to calculate probabilities of compound events.

### **Sample Exit Standards Grade MATH** (See NYSED Next Gen Grade 8 Crosswalk<sup>2</sup>)

<b>Mathematical Practices</b>	
1. Make sense of problems and persevere in solving them.	5. Use appropriate tools strategically.
2. Reason abstractly and quantitatively.	6. Attend to precision.
3. Construct viable arguments and critique the reasoning of others.	7. Look for and make use of structure.
4. Model with mathematics.	8. Look for and express regularity in repeated reasoning.

In Grade 8, instructional time should focus on three areas: (1) formulating and reasoning about expressions and equations, including modeling an association in bivariate data with a linear equation, and solving linear equations and systems of linear equations; (2) grasping the concept of a function and using functions to describe quantitative relationships; (3) analyzing two- and three-dimensional space and figures using distance, angle, similarity, and congruence, and understanding and applying the Pythagorean Theorem. Please note that while every standard/topic in the grade level has not been included in this overview, all standards should be included in instruction.

- Through their learning in the **Number System**, the **Expressions, Equations, and Inequalities**, and the **Probability and Statistics** domains, students:
  - recognize equations for proportions ( $y/x = m$  or  $y = mx$ ) as special linear equations ( $y = mx + b$ ), understanding that the constant of proportionality ( $m$ ) is the slope, and the graphs are lines through the origin;
  - understand that the slope ( $m$ ) of a line is a constant rate of change, as well as how the input and output change as a result of the constant rate of change;
  - interpret a model in the context of the data by expressing a linear relationship between the two quantities in question and interpret components of the relationship (such as slope and y-intercept) in terms of the situation;
  - solve systems of two linear equations in two variables and relate the systems to pairs of lines in the plane; these intersect, are parallel, or are the same line; and
  - use linear equations, systems of linear equations, linear functions, and their understanding of slope of a line to represent, analyze, and solve a variety of problems.
- Through their learning in the **Functions** and the **Expressions, Equations, and Inequalities** domains, students:
  - grasp the concept of a function as a rule that assigns to each input exactly one output;
  - understand that functions describe situations where one quantity determines another; and
  - translate among representations and partial representations of functions (noting that tabular and graphical representations may be partial representations of the function), and describe how aspects of the function are reflected in the different representations.
- Through their learning in the **Geometry** domain, students:
  - use ideas about distance and angles, how they behave under translations, rotations, reflections, and dilations, and ideas about congruence and similarity to describe and analyze two-dimensional figures and to solve problems;
  - show angle sums and parallel lines;
  - understand the statement of the Pythagorean Theorem.

<sup>2</sup> <https://www.nysed.gov/sites/default/files/programs/curriculum-instruction/nys-math-standards-grade-8-crosswalk.pdf>

## **Attachment 4: Student Discipline**

Vertus Middle will implement the same student discipline policy currently in effect at Vertus High. The full policy is greater than 5 pages; however, key aspects of the policy can be found below, with a complete policy found [here on their website](#).

### **Student Discipline Code**

This policy has been designed to create a safe learning environment. Rules are consistently enforced. Student disciplinary offenses are those actions or inactions that violate the Discipline Code or interfere with the delivery of educational services, jeopardize the health, safety, and welfare of any member of the school community, or threaten the integrity and stability of the school.

- A disciplinary offense may occur while the student is: at school and/or on, or adjacent to school grounds; participating in a school-sponsored activity; walking to or from school or a school-sponsored event; walking to or from, waiting for, or riding on school-provided transportation; or walking to or from, waiting for, or riding on public transportation to and from school or a school-sponsored activity conducted off school grounds.
- School-related disciplinary offenses may also include misconduct outside the school, such as the misuse of social media that could reasonably affect the school or learning environment. School administration will use their professional judgment in determining which disciplinary action(s) will be most effective in dealing with the student's misconduct.

**Disciplinary Offenses:** The following list is a sample of offenses contained within the policy; it is not exhaustive but provides examples of violations that may result in disciplinary action. The list may be modified from time to time and/or supplemented by Vertus staff with notice to students.

#### **1. DISRUPTING THE SCHOOL ENVIRONMENT**

- 1.1 Arriving Late to School or Class:** Student tardiness disrupts class, inconveniences others, and often results in academic difficulties. Students may not be late to school or class.

#### **2. ASSAULT, BATTERY, BODILY HARM, INAPPROPRIATE TOUCHING, AND/OR THREATS**

- 2.1 Engaging in Shouting or Threatening Verbal Exchanges:** Students may not engage in shouting or threatening verbal exchanges with another student, employee or another person. Students participating in verbal exchanges which require staff intervention may be required to participate in mediation or mandated to meet with a staff member to de-escalate the tension. This offense may result in suspension and/or expulsion or other disciplinary consequences, depending on the circumstances.

#### **3. POSSESSION OR USE OF FIREARMS, WEAPONS, AND/OR DANGEROUS OBJECTS**

- 3.1 Possession or Use of a Firearm:** Students may not possess or use a firearm. In compliance with Gun Free schools Act, 20 U.S.C. § 7151, the school will expel from school for a period of not less than 1 year a student who is determined to have brought a firearm to a school, or to have possessed a firearm at school, except that the Principal may modify such expulsion requirement for a student on a case-by-case basis if such modification is in writing.

#### **4. POSSESSION, USE, OR DISTRIBUTION OF CONTROLLED SUBSTANCES, ALCOHOL, AND TOBACCO**

- 4.1 Using or Possessing Drugs or Alcohol:** Students may not use or possess any non-

prescribed controlled substance, narcotic drug, hallucinogenic drug, amphetamine, barbiturate, marijuana, alcoholic beverage, or intoxicant of any kind. Prescribed and over-the-counter drugs must be delivered to the designated school staff person by the guardian with a signed medication authorization form, unless the school nurse approves possession of prescribed or over-the-counter drugs with appropriate authorization. This offense may result in suspension and/or expulsion or other disciplinary consequences, depending on the circumstances. In addition, the student may be enrolled in counseling and a group which supports adolescents struggling with drug-abuse.

**5. HARASSMENT AND VIOLATIONS OF CIVIL RIGHTS**

**5.1 Violating the Civil Rights of Others:** Students may not violate the civil rights of others. This offense may result in suspension and/or expulsion or other disciplinary consequences, depending on the circumstances.

**6. THEFT OR VANDALISM**

**6.1 Theft, Loss, or Destruction of Personal or School Property:** Students may not steal, lose, or damage someone else's property or school property. In addition to facing other consequences for violation of this rule, students are expected to return property to its rightful owner in its original condition or to reimburse the owner and/or the school for lost, damaged, or stolen property. This offense will result in suspension and/or expulsion or other disciplinary consequences, depending on the circumstances.

**7. FAILURE TO COMPLY WITH SCHOOL-IMPOSED CONSEQUENCES:** Students must comply with school-imposed consequences. This offense may result in suspension and/or expulsion or other disciplinary consequences, depending on the circumstances.

**8. REPEATED VIOLATIONS OF THE CODE OF CONDUCT:** Progressively more serious disciplinary consequences shall be imposed upon any student who repeatedly commits one or more disciplinary offenses.

**Consequences for Violations of Policy**

**Detention:** A student may be removed from class or issued a detention for violations of the Code, including but not limited to: disruption to the school environment, tardiness, off-task behavior in class, lack of preparation for class, excessive talking or any type of disruption in class, failure to follow school/classroom rules or norms, insubordinate behavior, or obscene or abusive language or gestures. All Vertus staff members may remove a student from class for a student's misbehavior.

**Suspensions:** Suspensions are a severe form of disciplinary action. Important information regarding suspensions is provided below.

- Before the student is permitted to return to school, a mandatory meeting must take place. The student, the guardian, an administrator and the staff member involved in the dispute should be present. Failure to attend the meeting can result in additional days of suspension.
- Depending on the nature of the suspension, a student may be placed on a Behavior Contract or Behavior Improvement Plan. This plan will outline specific behaviors that the student will address with their Preceptor/Teachers and work to improve.
- Throughout the duration of their suspension, students are not permitted on school grounds for any reason other than a pre-arranged meeting with Vertus staff. Failure to adhere to this

policy will result in an additional day of suspension.

- Any student receiving a suspension will be offered alternate instruction either on school or at an alternate location throughout the duration of the suspension. Students and guardians will be given instructions in how to access on-line classes so that academic progress will not be impeded.

**Short-Term Suspension:** A short-term suspension refers to the removal of a student for a period of up to ten days. The Principal and/or his designee determine the duration of short-term suspension on a case-by-case basis. The Principal or his or her designee may impose a short-term suspension, and shall follow due process procedures consistent with federal case law pursuant to *Goss v. Lopez* (419 U.S. 565). Before imposing a short-term suspension, the Principal/designee shall provide notice to inform the student of the charges against him or her, and if the student denies the charges, an explanation of the evidence against the student will be provided. The student will also be provided with the opportunity to present his or her version of the events. Before imposing a short-term suspension, the Principal/designee shall immediately notify the guardian that the student may be suspended from school. Written notice shall be provided by personal delivery or express mail delivery within 24 hours of the decision to impose suspension. The delivery will be sent to the last known address of the guardian(s). Where possible, notification also shall be provided by telephone. Such notice shall provide a description of the incident(s) for which suspension is proposed and shall inform the guardian(s) of their right to request an immediate informal conference with the Principal/designee. Such notice and informal conference shall be in the dominant language or mode of communication used by the guardian. Guardians are encouraged to make an appointment with the Principal should they disagree with the Principal/designee's decision to impose a short-term suspension. In addition, the Complaint procedures are available to guardians who want to challenge a short-term suspension decision.

**Long-Term Suspension/Expulsion:** A long-term suspension is the removal of a student from Vertus for a period of more than ten days. An expulsion is the permanent removal of a student from Vertus. A long-term suspension or expulsion may be imposed by a hearing officer ("Hearing Officer"). The Hearing Officer shall be the Principal, his or her designee, or a member of the school's Board. Students may receive long-term suspensions or expulsions for serious and/or repeated violations of the Code of Conduct. The Hearing Officer has the discretion to determine whether a long-term suspension or expulsion is warranted on a case-by-case basis, taking into account all relevant factors, and considering the evidence presented at a Formal Disciplinary Hearing.

Prior to the imposition of a long-term suspension or expulsion, students are subject to the following due process procedures, consistent general due process protections and with those laid out in *Goss v. Lopez*, 419 U.S. 565 (1975). If a student commits an offense that calls for long-term suspension or expulsion, the following steps are taken:

- If necessary, the student will be immediately removed from class and/or school.
- Upon determining that a student's action warrants a possible long-term suspension, the Principal/designee shall verbally inform the student that he or she is being suspended and is being considered for a long-term suspension (or expulsion) and state the reasons for such actions.

- The guardian will be notified in writing by Vertus. Written notice shall be provided by personal delivery or express mail delivery within 24 hours of the decision to impose suspension. The delivery will be sent to the last known address(es) of the guardian(s). Where possible, notification also shall be provided by telephone. Such notice shall provide a description of the incident or incidents which resulted in the suspension and shall indicate that a Formal Disciplinary Hearing will be held on the matter that may result in a long-term suspension or expulsion. The notification provided shall be in the dominant language used by the guardian(s). At the Formal Disciplinary Hearing, the student shall have the right to be represented by counsel, to question witnesses, and to present evidence.
- The school will set a date for a Formal Disciplinary Hearing. The student's guardian(s) will be notified in writing of the date and time, place, right to representation by legal counsel, right to present evidence and question witnesses, and right to request a record.
- The Hearing Officer shall have the authority to hear and render a decision on the matter. The Hearing Officer shall oversee the Formal Disciplinary Hearing and listen to both sides, asking clarifying questions as needed.
- A written decision shall be issued to the student by the Hearing Officer that indicates a finding of the facts on the charge(s) and the disciplinary decision reached. This written decision shall be sent to the student and guardian(s) within seven days after the Formal Disciplinary Hearing.

The decision to impose a long term suspension or expulsion may be appealed to the Board of Trustees. A request for an appeal must be received by the Board of Trustees within two weeks of the Hearing Officer's written decision. On appeal, the Board, or a Board appointed sub-committee, will review the record of the Formal Disciplinary Hearing and any exhibits presented there, and the student and the school will each have an opportunity to present a summary of their positions along with any additional documentary evidence they consider probative. The Board may elect to ask questions of the parties as well. The Board will provide the student with a written decision within seven days of the appeal hearing. The decision of the Board shall be final, except where violations of law or of the school's charter are alleged. In such cases, the matter may be further appealed to the school's authorizer, as discussed in the Formal Complaint Policy.

**Discipline for Students with Disabilities:** In addition to the discipline procedures applicable to all students, the school will follow all applicable provisions of law relating to students with disabilities. A student not specifically identified as having a disability but whose school district of residence or charter school, prior to the behavior which is the subject of the disciplinary action, has a basis of knowledge—in accordance with 34 CFR 300.534—that a disability exists may request to be disciplined in accordance with these provisions. The school shall comply with sections 300.530-300.536 of the Code of Federal Regulations. The school shall maintain written records of all suspensions and expulsions of students with a disability including the name of the student, a description of the behavior engaged in, the disciplinary action taken, and a record of the number of days a student has been suspended or removed for disciplinary reasons.

For infractions that do not constitute a change in placement or that constitute a change in placement for 10 days or less (cumulative), students with disabilities shall be subject to the same



disciplinary policy as students without disabilities. Students will receive the same legally required compensatory education as other students. If a student identified as having a disability is suspended during the course of the school year for a total of more than 10 days, such student will immediately be referred to the CSE of the student's district of residence so that the CSE can determine whether the behavior is a manifestation of the student's disabilities. In addition to the manifestation determination, the CSE may reconsider the student's educational placement. Such a student shall not be suspended for a total of more than ten days during the school year without the specific involvement of the CSE of the student's district of residence prior to the eleventh day of suspension, because such suspensions may be considered to be a change in placement.

In considering the placement of students referred because of disciplinary problems, the CSE of the students' district of residence is expected to follow its ordinary policies with respect to parental notification and involvement. The CSE will be notified in the event of:

- The commission of an infraction by a student with a disability who has previously been suspended for the maximum allowable number of days
- The commission of any infraction by a disabled student, regardless of whether the student has previously been suspended during the school year if, had such infraction been committed by a non-disabled student, the school would seek to impose a suspension in excess of 10 days.

Students with IEPs who are removed for a period of fewer than ten days will be able to access all core classes on-line from home or a public library. Classroom assignments will be provided. An assigned educator will monitor the student's progress and provide alternate instruction so that the student is given full opportunity to complete assignments and master the curriculum, including additional instructions, phone assistance, computer interaction and/or home or in-school appointments.

Students with IEPs who are removed for more than ten days which is determined to be a change in placement will receive services to the extent determined necessary to enable the child to appropriately progress in the general curriculum and in achieving the goals of his IEP. During any removal for drug or weapon offenses pursuant to 34 CFR Sec. 300.530 (g), services will also be provided to the extent necessary to enable the student with an IEP to appropriately progress in the general curriculum and in achieving the goals of his IEP. These service determinations will be made by the CSE. Students will be placed in interim alternative educational settings as appropriate per 34 CFR Sec. 300.520(g).

Students with 504 plans will be subject to the same disciplinary policies as students with IEPs, with the exception that in the case of a change in placement totaling more than 10 days, the student shall not be referred to the CSE. The school will conduct its own hearing to determine if the behavior is a manifestation of the disability.



#### 4a: Sample Student Schedule\*

	Period	Monday	Tuesday	Wednesday	Thursday	Friday
7:30 - 8:00 (30 mins)		<b>Breakfast</b>	<b>Breakfast</b>	<b>Breakfast</b>	<b>Breakfast</b>	<b>Breakfast</b>
8:00 - 8:15 (15 mins)		Advisory	Advisory	Advisory	Advisory	Advisory
8:18 - 9:08 (50 mins)	1	Math	ELA	Math	ELA	Math
9:11 - 10:11 (60 mins)	2	Learning Lab Science / Social Studies	Seminar	Learning Lab Science / Social Studies	Seminar (CTE)	Learning Lab Science / Social Studies
10:14 - 11:29 (75 mins)	3	ELA (intervention included)	Math (intervention included)	ELA (intervention included)	Math (intervention included)	ELA (intervention included)
11:32 - 11:52 (20 non-inst. mins)		<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>
11:55 - 12:55 (60 mins)	4	Learning Lab Intervention/ Enrichment	Learning Lab Science / Social Studies	Learning Lab Science / Social Studies	Learning Lab Science / Social Studies	Learning Lab Intervention/ Enrichment
12:58 - 1:48 (50 mins)	5	PE	Rotation	PE	Rotation	PE (Health)
1:51 - 2:41 (50 mins)	6	World Language	PLTW	World Language	PLTW	World Language or Rotation
2:44 - 3:00 (16 mins)	7	Advisory (go back to lab for dismissal)	Advisory (go back to lab for dismissal)	Advisory (go back to lab for dismissal)	Advisory (go back to lab for dismissal)	Advisory (go back to lab for dismissal)

\*Sample: The Principal will create the schedule prior to school's opening.

Instructional Minutes		
ELA	<ul style="list-style-type: none"> <li>Period 1 on Tuesday and Thursday (50 minutes each)</li> <li>Period 3 on Monday, Wednesday, and Friday (75 minutes each)</li> <li><b>Total Weekly Minutes: 325 minutes</b></li> </ul>	1 unit of study per year – 180 minutes/week
Math	<ul style="list-style-type: none"> <li>Period 1 on Monday, Wednesday, Friday (50 minutes each)</li> <li>Period 3 on Tuesday and Thursday (75 minutes each)</li> <li><b>Total Weekly Minutes: 300 minutes</b></li> </ul>	1 unit of study per year – 180 minutes/week
Science	<ul style="list-style-type: none"> <li>Period 2 on Monday and Friday (60 minutes each)</li> <li>Period 4 on Wednesday (60 minutes each)</li> <li><b>Total Weekly Minutes: 180 minutes</b></li> </ul>	1 unit of study per year – 180 minutes/week
Social Studies	<ul style="list-style-type: none"> <li>Period 2 on Wednesday (60 minutes each)</li> <li>Period 4 on Tuesday and Thursday (60 minutes each)</li> <li><b>Total Weekly Minutes: 180 minutes</b></li> </ul>	1 unit of study per year – 180 minutes/week
CTE	<ul style="list-style-type: none"> <li>Period 6 on Tuesday and Thursday (PLTW 50 minutes each)</li> <li>Period 2 build in 60 minutes/week</li> <li><b>Total Weekly Minutes: 160 minutes</b></li> </ul>	0.875 unit of study/year –157.5 minutes/week
PE	<ul style="list-style-type: none"> <li>Period 5 on Monday, Wednesday, and Friday (60 minutes each)</li> <li><b>Total Weekly Minutes: 180 minutes</b></li> </ul>	Every other day
Rotation	<ul style="list-style-type: none"> <li>Period 5 on Tuesday and/or Thursday (50 minutes each)</li> <li><b>Total Weekly Minutes: 100 minutes</b></li> </ul>	.25 Health or Library and Info (45 minutes/week per year) .25 Visual and .25 Music – 45 minutes/ week each per year
LOTE (Spanish)	<ul style="list-style-type: none"> <li>Period 6 on Monday, Wednesday, and Friday (50 minutes each)</li> <li><b>Total Weekly Minutes: 150 minutes</b></li> </ul>	1 unit of study over 2 years –180 minutes per week
Learning Lab	<b>Intervention or Enrichment</b> <ul style="list-style-type: none"> <li>Period 4 on Monday and Friday (60 minutes each)</li> <li><b>Total Weekly Minutes: 120 minutes</b></li> </ul>	N/A
Advisory	<ul style="list-style-type: none"> <li>Periods 1 and 7 Monday through Friday (15 minutes each)</li> <li><b>Total Weekly Minutes: 150 minutes</b></li> </ul>	N/A
Seminar (CTE)	<ul style="list-style-type: none"> <li>Period 2 on Tuesday and Thursday (60 minutes each)</li> <li><b>Total Weekly Minutes: 120 minutes</b></li> </ul>	N/A

<b>Total</b>	<b>1875 minutes per week with advisory</b> <b>1725 minutes per week not including advisory</b>	<b>1,147.5 minutes per week (minimum)</b>
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Over two years:

- English language arts, two units of study;
- Social studies, two units of study;
- Science, two units of study;
- Mathematics, two units of study;
- Career and Technical Education, one and three quarters unit;
- Physical education as required by section 135.4(c)(ii) of Commissioner's Regulations (basically, every other day);
- Health education, one half unit of study as required by section 135.3(c) of Commissioner's Regulations;
- The arts, including one half unit of study in the visual arts, and one-half unit of study in music;
- Library and information skills, the equivalent of one period per week in grade seven and eight;
- Languages other than English pursuant to section 100.2(d) of Commissioner's Regulations; - ONE UNIT OF STUDY over 2 years
- Career development and occupational studies.

## Attachment 4b: Sample Teacher Schedule

Sample Teacher Schedule

Period	Time	Min	Activity
	8:00 to 8:15	15	Planning
1	8:18 to 9:08	50	Teacher-Led Classroom
2	9:11 to 10:11	60	Teacher-Led Classroom
3	10:14 to 11:29	75	Extended Core (Teacher-Led)
4	11:32-11:52	20	Lunch & Duty
5	12:58-1:48	65	Specials: Planning
6	1:51-2:41	50	Collaboration for Teachers or Teacher-Led Classroom
7	2:44-3:00	16	Advisory
	3:00		Student Dismissal

# Vertus Middle - DRAFT Proposed 1st Year Calendar

## 2027-2028 School Calendar

August 2027						
Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

September 2027						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

October 2027						
Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

November 2027						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

December 2027						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

January 2028						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

February 2028						
Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29				




March 2028						
Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	




April 2028						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						


May 2028						
Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June 2028						
Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

July 2028						
Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

 School Closed  
 Early Release Day  
 Remote Learning Day/Teacher PD

 Staff Only  
 Report Cards  
 First and Last Day of School

 Marking Period Ends

Aug 30	Sep 2	Pre Service Teacher PD (4 days)
Sep 3	6	Labor Day Break
Sep 7		Pre Service Teacher PD (1 day)
Sep 8		Fall Semester Begins
Sep 24		Remote Learning Day / Teacher PD
Oct 8		Remote Learning Day / Teacher PD
Oct 11		Indigenous Peoples' Day
Oct 22		Remote Learning Day / Teacher PD
Nov 2		Remote Learning Day / Teacher PD
Nov 11		Veteran's Day
Nov 22	26	Thanksgiving Break no school
Dec 3		Remote Learning Day / Teacher PD
Dec 22	31	Winter Break no school
Jan 17		MLK Jr. Day no school

Jan 31		Remote Learning Day / Teacher PD
Feb 11		Remote Learning Day / Teacher PD
Feb 14	18	Winter Recess no school
Feb 25		Remote Learning Day / Teacher PD
Mar 17		Remote Learning Day / Teacher PD
Apr 3	7	Spring Break no school
Apr 21		Remote Learning Day / Teacher PD
Apr 28		Remote Learning Day / Teacher PD
May 26		Remote Learning Day / Teacher PD
May 29		Memorial Day no school
Jun 19		Juneteenth
Jun 23		Last Day of School
Jul 20	21	Pre Service Teacher PD (2 days)
Jul 24		Summer Session Begins (20 days)

# Application: Vertus Charter Middle School

Locey Julie - jlocey@vertusschool.org  
New Charter School Applications

## Summary

ID: 7879213348  
Status: Full Application Review  
Last submitted: Jul 6 2025 08:13 PM (EDT)

## Table 1: Applicant Group Information

Completed - Apr 22 2025

### [Applicant Instructions](#)

**Ia. Applicant Group Members:** Using **Table 1**, provide the name, contact information, current employment, the current or prospective role, and the relevant experience, skills, and/or qualifications in the proposed school for all members of the applicant group, which includes the initial proposed board of trustees and any known proposed school employees. Table 1 is a fillable table within the portal.

## Table 1: Applicant Group Information

Must include a minimum of 5 members proposed as Trustees

## 1a. Applicant Group Information

The term “applicant group” includes those actively participating in the planning of the application to establish the proposed charter school; those individuals who will comprise the initial board of trustees; and those individuals (if any) who will become school employees. (Employees cannot are not permitted to serve on the Board of Trustees of Regents-authorized charter schools, including as ex-officio members).

	Name/Phone/Email Address	Current Employment	Relevant Experience/Skills and Role on Applicant Group	Proposed Role in School (e.g., trustee, employee, none)	Proposed Position on Board (Officer, Trustee, Constituent Rep)
1	Sylvia David-West [REDACTED] [REDACTED] [REDACTED]	Program Manager, L3Harris; Northeast Regional Director, L3Harris Employees of African Descent ERG	Over 15 years of technical and manufacturing experience; manages and coordinates cross-functional teams; active member of various professional and diversity organizations; strong commitment to leadership, development, and fostering a culture of continuous improvement	trustee	trustee
2	Evan Gallina [REDACTED] [REDACTED] [REDACTED]	Partner, Gallina Development Corp	Partner at Gallina Development Corp; has been involved in the Commercial/Industrial Real Estate market for over 9	secretary and trustee	secretary and trustee



			years and brings facilities management and real estate expertise to the board		
3	Calvin J. Gantt [REDACTED] [REDACTED] [REDACTED]	Vice President - Diversity, Equity and Belonging/Executive Director, Downtown Campus, Monroe Community College, Rochester, New York	VP for Diversity, Equity, and Belonging and Executive Director for the Downtown Campus; serves as member of the President's Cabinet; brings experienced and collaborative leadership as well as a strategic vision to the College; oversees specific functional areas; and oversees the services and operations of the Downtown Campus	trustee	trustee
4	Dekedrian Johnson [REDACTED] [REDACTED] [REDACTED]	Cybersecurity Risk Analyst, Fanatics, Inc.	6-year background in information security, IT audit and risk management in the financial service, banking, telecommunication, manufacturing, and technology industries	trustee	trustee
5	Julie Locey [REDACTED]	CEO, Vertus Charter School	Current CEO at Vertus Charter	CEO, employee	n/a

	<a href="mailto:jlocey@vertusschool.org">jlocey@vertusschool.org</a>		School for past nearly 4 years; at Vertus 9 years total; experienced leader with proven track record		
6	John O'Connell [REDACTED] [REDACTED] [REDACTED]	Sr. Contracts Manager & Team Lead, Music Legal, Google	MBA with a specialization in finance; advises on and negotiates contracts for Google	Treasurer and Trustee	Treasurer and Trustee
7	David A. Paul, MD [REDACTED] [REDACTED] [REDACTED]	Neurosurgeon and Entrepreneur	Higher education board experience; background in leadership and healthcare; chairs the Fundraising Committee for Vertus High School	trustee	trustee
8	Victoria Van Voorhis [REDACTED] [REDACTED] [REDACTED]	Vice President of Product Strategy ZSpace, Inc.	Founder & CEO of Second Avenue Learning (recently acquired by ZSpace, Inc.); she brings more than 17 years of Ed-Tech experience to her organization, Second Avenue, and brings valuable leadership expertise to the	Board Chair and Trustee	Board Chair and Trustee

			current board of Vertus Charter School		
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#### **Ib. Public Contact**

**This information is captured in the Basic Letter of Intent Form to include the phone number and/or email address to which public inquiries about the proposed charter school may be addressed. This contact information will be public and available on the NYSED CSO website.**

### **Ic. Application History**

Identify whether any member of the current applicant group has ever applied to this or another charter entity to open this proposed school or another charter school, either in New York State or outside of New York State. Indicate the date on which the application(s) was/were submitted and to which charter entity; briefly describe the outcome of the charter entity's decision; and provide a concise description of significant modifications made in this LOI and application (if applicable)

The members of this group have never applied to this or another charter entity to open this or another school.

*Thank you!*

### **Application History**

Identify whether any member of the current applicant group has ever applied to this or another charter entity to open this proposed school or another charter school, either in New York State or outside of New York State. Indicate the date on which the application(s) was/were submitted and to which charter entity; briefly describe the outcome of the charter entity's decision; and provide a concise description of significant modifications made in this application (if applicable).

The members of this group have never applied to this or another charter entity to open this proposed school or any other charter school.

**NEW YORK STATE EDUCATION DEPARTMENT  
CHARTER SCHOOL OFFICE**

**ATTACHMENT 5a: NEW APPLICANT AND PROSPECTIVE  
SCHOOL TRUSTEE BACKGROUND INFORMATION SHEET  
(For New School Applications Only)**

**Applicant Group Members ("AG"):** The term Applicant Group is newly applied to include those individuals formerly identified as *lead applicants* and those participating in the planning of the application to establish the proposed charter school; those who will comprise the initial board of trustees; and those who will become school employees—anyone who is involved in the development of the Letter of Intent and the Full Application. All members, including prospective board members, must provide the background information where indicated for Applicant Group Members.

**Prospective BOT Members ("BOT"):** Service on a public charter school board of trustees ("board") is a position of great trust and responsibility. As a member of a public charter school's board, you are charged with overseeing the education of all students enrolled in the school, as well as the expenditure of public monies directed to the charter school. To properly evaluate proposed board members, please provide full and complete background information where indicated for proposed board members.

Note: Additionally, prospective members of the Board of Trustees are required to undergo a criminal background check via a fingerprint scan arranged by and at the expense of the State Education Department. ***The inability or unwillingness of any member of the applicant group to promptly undergo the required criminal background check via fingerprint scans within the timeframe requested in advance of the Board of Regents meeting shall be grounds for terminating an application or denying a charter recommendation.***

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**CONTACT INFORMATION FOR ALL APPLICANT GROUP MEMBERS**

**Member Name:** Spencer Ash

**Proposed Charter School Name:** Vertus Charter Middle School

**E-Mail Address:** [REDACTED]

**Home Telephone:** [REDACTED]

**Home Address:** [REDACTED]

**Business Telephone:** 585-428-6699

**Business Address:** 30 Church Street Rochester NY 14613

Please note that this document is considered a public record and as such, may be made available to members of the public upon request under the Freedom of Information Law. Personal contact information provided above will be redacted.

### Background Information – All Applicant Group Members

1. Please provide your educational and employment history. You may do so by attaching a résumé. **Note:** Individuals are not required to have degrees or education credentials to serve on a charter school's Board of Trustees. This documentation is for identify verification only.

☒ Résumé Attached

☒ Copy of Diploma, Transcript or Supporting Documentation Attached

☐ If education credentials are not available, please submit a signed and notarized letter stating the highest level of education obtained and the reason why the documentation cannot be provided.

2. Please indicate how you became aware of the opportunity to join the applicant group.  
I sit on the Board of Vertus High School and it was discussed and brought to my attention there.

3. Please affirm that you have read Article 56 of the New York State Education Law and understand the relationship between a charter school and the authorized chartering entity as defined in that statute.

☒ I affirm.

4. Please affirm that you have read and understand the charter school application, the charter school board's by-laws and all proposed policies. If your team has not yet submitted a full application, please affirm that you will commit to read and understand the charter school application, the charter school board's by-laws and all proposed policies at the time of its submission for review.

☒ I affirm.

## Statement of Intent—All Applicant Group Members

5. Please provide a personal statement regarding the experience and skills that you bring to the table.

As an African-American lawyer, I not only bring my legal expertise, but also represent the students we serve. My lived experience can serve as an example for the students

6. Please provide a personal statement regarding your role, responsibilities, and commitment in relation to the development and preparation of the application (as a member of the applicant group), and/or in relation to the operation of the charter school (if you are a member of the proposed initial board of trustees).

I will serve as a trustee on the proposed board. My legal expertise will provide a solid background for any questions or policies that come up with a legal bent. I recognize that this will be a governance role providing accountability and support to the Board and school personnel.

7. Please provide any other information that you feel is pertinent to the Department's review of your background.

Spencer Ash

Printed Name

[Redacted Signature]

Signature

6/17/25

Date



### Background Information—Proposed Board of Trustees Only

8. Please affirm that you are or will be at least eighteen years old at the time of your appointment/election to the board.

☒ I affirm.

9. Please indicate whether you have ever been convicted of a misdemeanor and/or felony in state or federal court in any jurisdiction.

☒ This does not apply to me. ☐ Yes.

If the answer to this question is yes, please provide the following details regarding your conviction(s): (1) the name of the criminal offense(s); (2) whether the criminal offense(s) was a misdemeanor or felony; (3) the facts and circumstances surrounding your conviction(s); (4) the date(s) of your conviction(s); and (5) the date(s) of disposition(s).

10. Please indicate if you currently have any criminal charge(s) pending against you in state or federal court in any jurisdiction.

☒ This does not apply to me. ☐ Yes. If yes, please provide an explanation.

11. What board position(s) and/or offices(s) will you hold? (e.g., member, parent representative, vice-president, Finance committee, etc.):  
Trustee/Member \_\_\_\_\_

12. Please explain why you wish to serve on the board. I feel an affinity for the school's population and know that what we are achieving at the high school can make a positive impact on the younger students as well as addressing the educational deficiencies that exist in RCSD.

13. Please indicate whether you have previously served or are currently serving on a board of a school district, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 1, above). In addition, please describe any other experience, knowledge or skills you feel is relevant to service on the charter school board.

☒ This does not apply to me. ☐ Yes. (Include description here):

### Conflict of Interest - Proposed Board of Trustees Only

14. Please indicate whether you, your spouse, or other family member knows any of the other prospective board members.

☒ I / we do not know any such persons. ☐ Yes.

If your answer is yes, please indicate the precise nature of your relationship here:

15. Please indicate whether you, your spouse, or other family member knows any person who is a proposed charter school employee.

☒ I / we do not know any such persons. ☐ Yes.

If yes, please indicate the precise nature of your relationship here:

16. Please indicate if you, your spouse, or other family member or any corporation, business or other entity in which you, your spouse or other family member serve as an employee, officer, or director or own a controlling interest in, plans to contract or do business with, the proposed charter school, including but not limited to, the lease of real or personal property to the proposed charter school.

☒ No. ☐ Yes.

If yes, please describe the nature of the contract or business and, if applicable, the relationship of the person to the corporation, business or entity involved:

17. If the charter school is partnered with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you, your spouse, or any family member knows any employees, officers, owners, directors or agents of that provider. If your answer is in the affirmative, please describe any such relationship.

☐ Yes.

☒ Not applicable because the School does not/will not contract with a management company or charter management organization.

☐ I / we do not know any such persons.

18. If the charter school is partnered with an educational service provider, please indicate whether you, your spouse or other family member has a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ Yes.

☒ Not applicable because the School will not contract with a management company or charter management organization.

☐ I / we have no such interest.

19. If the charter school is partnered with an educational services provider, please indicate if you, your spouse or other family member anticipates conducting, or is conducting, any business with the provider. If so, please indicate the precise nature of the business that will be conducted.

☐ Yes.

☒ Not applicable because the School will not contract with a management company or charter management organization.

☐ I / we do not anticipate conducting any such business.

20. Please indicate the potential ethical or legal conflicts of interests (if any) that would, or are likely to, exist should you be approved for service on the charter school's board.

☒ None ☐ Yes

21. Please explain how you would handle a situation in which you believe one or more members of the charter school's board are involved in working for their own benefit, or the benefit of their friends and family. I would report it to the Board Chair and or NYSED.

22. Please indicate whether you, your spouse or other family member is a director, officer, employee, partner or member of, or is otherwise associated with, any organization which filed an application in conjunction with the charter school, i.e., is partnered with the charter school. To the extent you have provided this information in response to the previous items 16-23, you may so indicate.

☒ This does not apply to me, my spouse or other family members.

☐ Yes.

### **Educational Philosophy -Proposed Board of Trustees Only**

23. Please explain your understanding of the charter school's mission and/or philosophy.

The philosophy and mission of the Vertus Charter Middle School is the same as that of the high school: developing men of character. The school will allow for more time with our young men to build the foundational character traits associated with our shared mission.

24. Please explain your understanding of the educational program of the charter school.

The academic program will be scaled to include components of Vertus High School's blended learning program with an emphasis on literacy and foundational math skill building. Current data shows that students from the Rochester City School District lag behind the state in ELA and Math, and the personalized year-round academic program at Vertus Charter Middle School will target those deficits to move them to

grade level in the two years they are attending.

25. Please indicate what you believe to be the characteristics of a successful charter school. Please provide the specific steps you think the board of the charter school will need to take to ensure that this charter school is and remains successful.

Our board structure, with standing accountability, finance, and governance committees, is in place to ensure school success.



25/01/11

**STATEMENT OF ASSURANCE—PROPOSED TRUSTEES ONLY**

I, Spencer Ash (name of proposed board member) state that I am the applicant for board member approval and I have read the questionnaire and any supporting documents and know the contents thereof; that the same is true to my knowledge except as to the matters therein stated to be alleged upon information and belief, and as to those matters I believe it to be true and further acknowledge that I am aware of the fact that, pursuant to Penal Law §175.30, a person who knowingly offers a false instrument for filing to a public official or public servant is guilty of Offering a False Instrument for Filing in the 2<sup>nd</sup> Degree, a Class A Misdemeanor.

  
\_\_\_\_\_  
Signature

6/17/25  
\_\_\_\_\_  
Date



NEW YORK STATE EDUCATION DEPARTMENT  
CHARTER SCHOOL OFFICE

BACKGROUND INFORMATION SHEET FOR PROPOSED BOARD OF TRUSTEES  
MEMBER

(For Existing Board of Regents-Authorized Charter Schools)

**Proposed Board of Trustees Members:** Service on a charter school board of trustees ("board") is a position of great trust and responsibility. As a member of a charter school's board, you would be charged with overseeing the education of all students enrolled in the charter school, as well as the expenditure of public monies directed to the charter school. To enable the State Education Department's Charter School Office ("CSO") to properly evaluate proposed board members, please provide full and complete background information. If additional space is needed, please attach pages as necessary to completely answer all questions.

Note: Additionally, proposed board members are required to undergo a criminal history record check via fingerprinting arranged by and at the expense of the charter school.

CONTACT INFORMATION

Charter School Name: Vertus High School

Proposed Board Member Name: Allison Bell

Proposed Board Member E-Mail Address: [REDACTED]

Proposed Board Member Home Telephone: [REDACTED]

Proposed Board Member Home Address: [REDACTED]

Proposed Board Member Business Telephone: 585-267-4911

Proposed Board Member Business Address: 67 Monroe Ave Pittsford NY 14534

*Please note that this document is considered a public record and, as such, may be made available to members of the public upon request under the Freedom of Information Law. Personal contact information provided above will be redacted.*



### Background Information

1. Please provide your educational and employment history. You may do so by attaching the required résumé or curriculum vitae.

☒ Attached

2. Please indicate how you became aware of the charter school and the opportunity to serve as a member of its board. *I toured the building with colleagues and was made aware at that time*
3. Please affirm that you have read Article 56 of the New York State Education Law and understand the relationship between a charter school and the charter entity as defined therein. A copy of Article 56 can be found on the CSO website.

☒ I affirm. Initials AB

4. Please affirm that you have read and understand the charter, including the Bylaws, and all policies of or relating to the charter school.

☒ I affirm. Initials AB

5. Please affirm that you are or will be at least 18 years old at the time of your appointment/election to the board.

☒ I affirm. Initials AB

6. Please provide as an attachment and affirm that the academic and/or professional credential(s) or qualification(s) presented herein is/are true, accurate, and genuine.

☒ I affirm. Initials AB

7. Please provide a copy of your diploma and official transcript from your highest level of education (e.g. high school). If such documents cannot be provided, provide a signed and notarized letter setting forth the highest level of education obtained and the reason why these documents cannot be provided, including a description of the good faith efforts made to obtain them.

☒ Attached. Initials AB





8. Have you ever had any application for a teaching, professional, or vocational credential (i.e. license, certificate, or registration) in New York or any other jurisdiction denied?

☒ No.

☐ Yes.

If yes, please provide an explanation.

9. Have you ever surrendered a teaching, professional, or vocational credential (i.e. license, certificate, or registration) or had such credential revoked, suspended, invalidated, or otherwise subjected to a disciplinary penalty in any jurisdiction?

☒ No.

☐ Yes.

If yes, please provide an explanation.

10. Are you the subject of any pending investigation and/or disciplinary charge(s) for professional misconduct in any jurisdiction?

☒ No.

☐ Yes.

If yes, please provide an explanation.

11. Please indicate whether or not you have ever been convicted of a misdemeanor and/or felony in a State or federal court in any jurisdiction.

☒ No.

☐ Yes.

If the answer to this question is yes, please provide the following details regarding your conviction(s): (1) the name of the criminal offense(s); (2) whether the criminal offense(s) was a misdemeanor or felony; (3) the facts and circumstances surrounding your conviction(s); (4) the date(s) of your conviction(s); and (5) the date(s) of disposition(s).



Your response to question 11 may also include any relevant written information that you wish to be considered, including, but not limited to: certificates of conviction; any parole or probation documentation; any certificates, including any certificates of relief from disabilities; any proof of counseling and/or rehabilitation; any documentation attesting to your good conduct or good character; and any letters of support from friends, family, co-workers, employers, etc.

12. Please indicate if you currently have any criminal charge(s) pending against you in a State or federal court or in any jurisdiction.

☒ No.

☐ Yes.

If yes, please provide an explanation.

13. What board position(s) and/or offices(s) will you hold on this board? (e.g. member, parent representative, vice-president, finance committee, etc.).

Board member, finance committee member

14. Please indicate whether you have previously served or are currently serving on a board of a school district, a non-public school, or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 1, above). In addition, please describe any other experience, knowledge, or skills you feel is relevant to service on the board.

☒ No.

☐ Yes. (Include description here):



### Statement of Intent

15. Please provide a personal statement regarding the experience, skills, and commitment that you bring to the board and why you wish to serve.

I have been in the finance industry for over 10 years (started at an endowment) and hope my experience can be shared to support VERTUS. I am a charitably inclined individual and passionate to volunteer my time.

16. If applicable, please provide any other information that you feel is pertinent to the CSO's review of your background.

Instrument committee member of the YWCA (local).

### Conflict of Interest

17. Please indicate whether you, your spouse, or other family member know(s) any of the past, current, or proposed board members.

☒ No.  
☐ Yes.

If yes, please indicate the precise nature of your relationship:

18. Please indicate whether you, your spouse, or other family member know(s) any person who is a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO") (as defined by the guidance from the CSO entitled *Definition of an Entity that Provides Comprehensive Management Services*), whether for-profit or not-for-profit, which contracts with the charter school or education corporation.

☒ No.  
☐ Yes.

If yes, please indicate the precise nature of your relationship.



19. Please indicate if you, your spouse, or other family member, or any corporation, business or other entity in which you, your spouse, or other family member serve(s) as an employee, officer, or director, or own a controlling interest in, contracts or does business with, or plan(s) to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities.

☒ No.

☐ Yes.

If yes, please describe the nature of the contract or business and, if applicable, the relationship of the person to the corporation, business or entity involved.

20. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member know(s) any employees, officers, owners, directors, or agents of the CMO.

☒ No.

☐ Yes.

If yes, please indicate the precise nature of your relationship.

21. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member have/has a direct or indirect ownership, employment, or contractual or management interest in the CMO.

☒ No.

☐ Yes.

If yes, please provide a detailed description.



22. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member anticipate(s) conducting, or is conducting, any business with the CMO.

☒ No.

☐ Yes.

If yes, please indicate the precise nature of the business that is, or will be, conducted.

23. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the board.

N/A

24. Please explain how you would handle a situation in which you believe one or more members of the board are involved in working for their own benefit, or the benefit of their friends and family.

I would professionally bring it to the attention of our board chair and CEO, as appropriate.

25. Please indicate whether you, your spouse or other family member is a director, officer, employee, partner or member of, or is otherwise associated with, any organization which filed an application in conjunction with the charter school, i.e., is partnered with the charter school. To the extent you have provided this information in response to the previous items 17-24, you may so indicate.

☒ No.

☐ Yes.

If yes, please indicate the nature of your relationship:

### Educational Philosophy



26. Please explain your understanding of the charter school's mission, philosophy, and educational program.

Vertus High School is determined to help young men in the city of Rochester achieve their full potential as leaders of character. The school wishes to collaborate with students, families, and the Preceptors to foster an environment of growth, academically and personally. They have a variety of electives to support this growth to encourage real-world skills and readiness for work, college, military, etc. The Vertus Creed is the lifeblood of the organization and summarizes the philosophy and strong moral compass of the organization: "Their Brothers' Keeper, Leaders of Character, and most importantly, Vertus Men."

27. Please indicate your understanding of the role of the board and the relationship with the charter school's charter entity.

The role of the board is to support Vertus as a whole and ensure the success of the organization. We will ensure we are properly focused on the mission of the school and to use this to guide decision making across the board. Part of that responsibility is to oversee the CEO along with supporting the CEO. Board members should assist with organizational planning and oversee the functions of the program to ensure collaboration with the mission and the creed. Having ethical integrity alongside these goals is imperative. A large part of my involvement will be engaging with the community whenever possible to further the mission of the school.

28. Please indicate what you believe to be the characteristics of a successful charter school. In particular, please provide the specific steps you think the board of a charter school will need to take to ensure that the school is and remains successful.

Ensuring that the mission is adhered to and revisited to grow alongside the goals of the school is vital as Vertus grows. I think actively involving staff and preceptors in the conversations around the organization is additive to the success of everyone underneath the Vertus umbrella. A strong board and community support are large facets of a successful charter school and ensuring the success of students to encourage attendance and graduation rates. Having board members that are charitably inclined and have a passion for the mission will be the most successful in supporting the growth of the school. Ensuring to revisit financial structure and other goals (expansion, real estate etc.) in line with the mission is crucial. Supporting the decisions after a vote is casted and seeing them through is also important.

29. Please provide any other information that you feel is pertinent to SED's review.



## STATEMENT OF ASSURANCE

I, Allison Bell (name of proposed board member) declare and affirm that the statements made herein, including any accompanying documents, are true, complete, and correct. I understand that any false or misleading information or documentation contained herein may be grounds for disapproval of my appointment, and may result in criminal prosecution.

This form must be signed and dated in the presence of a notary public.

[Redacted Signature] 4/22/25  
Signature Date

State of Monroe New York Brent

)ss.:

County of Monroe

**BENJAMIN BENTLEY**  
Notary Public, State of New York  
Qualified in Monroe County  
Reg. No. 01BE6403366  
Commission Expires Jan. 21, 2028

On the 22 day of April in the year 2025, before me, the undersigned notary public, personally appeared Allison Bell, personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

[Redacted Signature] Notary Public

*last revised 08/21/2018*



**NEW YORK STATE EDUCATION DEPARTMENT  
CHARTER SCHOOL OFFICE**

**ATTACHMENT 5a: NEW APPLICANT AND PROSPECTIVE  
SCHOOL TRUSTEE BACKGROUND INFORMATION SHEET  
(For New School Applications Only)**

**Applicant Group Members ("AG"):** The term Applicant Group is newly applied to include those individuals formerly identified as *lead applicants* and those participating in the planning of the application to establish the proposed charter school; those who will comprise the initial board of trustees; and those who will become school employees—anyone who is involved in the development of the Letter of Intent and the Full Application. All members, including prospective board members, must provide the background information where indicated for Applicant Group Members.

**Prospective BOT Members ("BOT"):** Service on a public charter school board of trustees ("board") is a position of great trust and responsibility. As a member of a public charter school's board, you are charged with overseeing the education of all students enrolled in the school, as well as the expenditure of public monies directed to the charter school. To properly evaluate proposed board members, please provide full and complete background information where indicated for proposed board members.

**Note:** Additionally, prospective members of the Board of Trustees are required to undergo a criminal background check via a fingerprint scan arranged by and at the expense of the State Education Department. ***The inability or unwillingness of any member of the applicant group to promptly undergo the required criminal background check via fingerprint scans within the timeframe requested in advance of the Board of Regents meeting shall be grounds for terminating an application or denying a charter recommendation.***

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**CONTACT INFORMATION FOR ALL APPLICANT GROUP MEMBERS**

**Member Name:** \_\_\_\_\_ **Michael Paul Mandina**

**Proposed Charter School Name:** \_\_\_\_\_

**E-Mail Address:** \_\_\_\_\_

**Home Telephone:** \_\_\_\_\_

**Home Address:** \_\_\_\_\_

**Business Telephone:** \_\_\_\_\_

**Business Address:** \_\_\_\_\_ **6367 Dean Pkwy, Ontario, NY 14519**

*Please note that this document is considered a public record and as such, may be made available to members of the public upon request under the Freedom of Information Law. Personal contact information provided above will be redacted.*

### **Background Information – All Applicant Group Members**

1. Please provide your educational and employment history. You may do so by attaching a résumé. **Note:** Individuals are not required to have degrees or education credentials to serve on a charter school's Board of Trustees. This documentation is for identify verification only.

X Résumé Attached

☐ Copy of Diploma, Transcript or Supporting Documentation Attached

☐ If education credentials are not available, please submit a signed and notarized letter stating the highest level of education obtained and the reason why the documentation cannot be provided.

2. Please indicate how you became aware of the opportunity to join the applicant group.

Invited by a manufacturing industry leader.

3. Please affirm that you have read Article 56 of the New York State Education Law and understand the relationship between a charter school and the authorized chartering entity as defined in that statute.

X I affirm.

4. Please affirm that you have read and understand the charter school application, the charter school board's by-laws and all proposed policies. If your team has not yet submitted a full application, please affirm that you will commit to read and understand the charter school application, the charter school board's by-laws and all proposed policies at the time of its submission for review.

X I affirm.

### Statement of Intent—All Applicant Group Members

5. Please provide a personal statement regarding the experience and skills that you bring to the table.

I have decades long track record engaging with academia, government and industry to help build a workforce pipeline for our region. All academic achievement is important; however, I have been especially keen on skilled workforce development. Education of a STEAM nature that fully prepares youth for today's higher tech jobs.

My experience starting and leading a manufacturing company in addition to participating in key industry and government boards, makes me well suited to assist Vertus.

6. Please provide a personal statement regarding your role, responsibilities, and commitment in relation to the development and preparation of the application (as a member of the applicant group), and/or in relation to the operation of the charter school (if you are a member of the proposed initial board of trustees).

My role is to help establish relationships with community and industry partners to further the development of our regional education institutions, particularly Charter Schools.

7. Please provide any other information that you feel is pertinent to the Department's review of your background. **THIS IS NA**

Michael Paul Mandina

Printed Name

Signature

4/21/2025

Date

### **Background Information—Proposed Board of Trustees Only**

8. Please affirm that you are or will be at least eighteen years old at the time of your appointment/election to the board.

X ☐ I affirm.

9. Please indicate whether you have ever been convicted of a misdemeanor and/or felony in state or federal court in any jurisdiction.

X ☐ This does not apply to me. ☐ Yes.

If the answer to this question is yes, please provide the following details regarding your conviction(s): (1) the name of the criminal offense(s); (2) whether the criminal offense(s) was a misdemeanor or felony; (3) the facts and circumstances surrounding your conviction(s); (4) the date(s) of your conviction(s); and (5) the date(s) of disposition(s).

10. Please indicate if you currently have any criminal charge(s) pending against you in state or federal court in any jurisdiction.

X ☐ This does not apply to me. ☐ Yes. If yes, please provide an explanation.

11. What board position(s) and/or offices(s) will you hold? (e.g., member, parent representative, vice-president, Finance committee, etc.): \_

Fund Raising Committee, board member

12. Please explain why you wish to serve on the board.

I believe that in order for our city to prosper, the youth must be better educated. Historically, the RCSD has failed to meet the challenge, so I am hopeful to further improve outcomes for many city youth through my work with Vertus.

13. Please indicate whether you have previously served or are currently serving on a board of a school district, a non-public school or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 1, above). In addition, please describe any other experience, knowledge or skills you feel is relevant to service on the charter school board.

☐ This does not apply to me. X ☐ Yes. (Include description here):

**Please see resume attached.**

### **Conflict of Interest - Proposed Board of Trustees Only**

14. Please indicate whether you, your spouse, or other family member knows any of the other prospective board members.

X ☐ I / we do not know any such persons. ☐ Yes.

If your answer is yes, please indicate the precise nature of your relationship here:

15. Please indicate whether you, your spouse, or other family member knows any person who is a proposed charter school employee.

X ☐ I / we do not know any such persons. ☐ Yes.

If yes, please indicate the precise nature of your relationship here:

16. Please indicate if you, your spouse, or other family member or any corporation, business or other entity in which you, your spouse or other family member serve as an employee, officer, or director or own a controlling interest in, plans to contract or do business with, the proposed charter school, including but not limited to, the lease of real or personal property to the proposed charter school.

X ☐ No. ☐ Yes.

If yes, please describe the nature of the contract or business and, if applicable, the relationship of the person to the corporation, business or entity involved:

17. If the charter school is partnered with an educational service provider (a management company, whether for-profit or not-for-profit), please indicate whether you, your spouse, or any family member knows any employees, officers, owners, directors or agents of that provider. If your answer is in the affirmative, please describe any such relationship.

☐ Yes.

X ☐ Not applicable because the School does not/will not contract with a management company or charter management organization.

☐ I / we do not know any such persons.

18. If the charter school is partnered with an educational service provider, please indicate whether you, your spouse or other family member has a direct or indirect ownership, employment, contractual or management interest in the provider. For any interest indicated, please provide a detailed description.

☐ Yes.

X ☐ Not applicable because the School will not contract with a management company or charter management organization.

☐ I / we have no such interest.

19. If the charter school is partnered with an educational services provider, please indicate if you, your spouse or other family member anticipates conducting, or is conducting, any business with the provider. If so, please indicate the precise nature of the business that will be conducted.

☐ Yes.

☒ Not applicable because the School will not contract with a management company or charter management organization.

☐ I / we do not anticipate conducting any such business.

20. Please indicate the potential ethical or legal conflicts of interests (if any) that would, or are likely to, exist should you be approved for service on the charter school's board.

☒ None ☐ Yes

21. Please explain how you would handle a situation in which you believe one or more members of the charter school's board are involved in working for their own benefit, or the benefit of their friends and family.

They would need to resign from the board.

22. Please indicate whether you, your spouse or other family member is a director, officer, employee, partner or member of, or is otherwise associated with, any organization which filed an application in conjunction with the charter school, i.e., is partnered with the charter school. To the extent you have provided this information in response to the previous items 16-23, you may so indicate.

☒ This does not apply to me, my spouse or other family members.

☐ Yes.

### **Educational Philosophy -Proposed Board of Trustees Only**

23. Please explain your understanding of the charter school's mission and/or philosophy.

My view of the Vertus mission is to prepare young men for living wage professions and/or college. Essentially become contributing members of society. Given the demographic of Rochester city youth, this population is challenging in many ways. I believe that a significant amount of Vertus's role is to develop character, pride and responsibility. Vertus graduates are men of character.

24. Please explain your understanding of the educational program of the charter school.

It is a blended mix of technology assisted learning and traditional student-teacher classes. In addition, the Preceptor role is a much-needed position that provides the encouragement, caring and adult role-model that inspires the students to achieve at a higher level while building in a mechanism for accountability.

**25. Please indicate what you believe to be the characteristics of a successful charter school. Please provide the specific steps you think the board of the charter school will need to take to ensure that this charter school is and remains successful.**

**A successful charter school will have high graduation rates, be fiscally sound and be first choice among parents in its community.**

**In order to remain successful, the school must operate at a high level by maintaining a high quality, highly motivated staff that exemplifies and models the "Brother's Keeper" culture.**

**This likelihood of success will be enhanced by recruiting financial benefactors who share the Vertus vision and are willing to provide resources because of the proven benefits and success of Vertus graduates.**



**STATEMENT OF ASSURANCE—PROPOSED TRUSTEES ONLY**

I, Michael Paul Mandina state that I am the applicant for board member approval and I have read the questionnaire and any supporting documents and know the contents thereof; that the same is true to my knowledge except as to the matters therein stated to be alleged upon information and belief, and as to those matters I believe it to be true and further acknowledge that I am aware of the fact that, pursuant to Penal Law §175.30, a person who knowingly offers a false instrument for filing to a public official or public servant is guilty of Offering a False Instrument for Filing in the 2<sup>nd</sup> Degree, a Class A Misdemeanor.

  
\_\_\_\_\_  
Signature

4-22-25  
\_\_\_\_\_  
Date



**NEW YORK STATE EDUCATION DEPARTMENT  
CHARTER SCHOOL OFFICE**

**BACKGROUND INFORMATION SHEET FOR PROPOSED BOARD OF TRUSTEES  
MEMBER  
(For Existing Board of Regents-Authorized Charter Schools)**

**Proposed Board of Trustees Members:** Service on a charter school board of trustees ("board") is a position of great trust and responsibility. As a member of a charter school's board, you would be charged with overseeing the education of all students enrolled in the charter school, as well as the expenditure of public monies directed to the charter school. To enable the State Education Department's Charter School Office ("CSO") to properly evaluate proposed board members, please provide full and complete background information. If additional space is needed, please attach pages as necessary to completely answer all questions.

Note: Additionally, proposed board members are required to undergo a criminal history record check via fingerprinting arranged by and at the expense of the charter school.

**CONTACT INFORMATION**

Charter School Name: Vertus Charter School

Proposed Board Member Name: Jeffrey Wynn

Proposed Board Member E-Mail Address: [REDACTED]

Proposed Board Member Home Telephone: [REDACTED]

Proposed Board Member Home Address: [REDACTED]

Proposed Board Member Business Telephone: (585) 415-9152

Proposed Board Member Business Address: 217 W Main St. Roch, 14614

*Please note that this document is considered a public record and, as such, may be made available to members of the public upon request under the Freedom of Information Law. Personal contact information provided above will be redacted.*



### Background Information

1. Please provide your educational and employment history. You may do so by attaching the required résumé or curriculum vitae.

☒ Attached

2. Please indicate how you became aware of the charter school and the opportunity to serve as a member of its board. *Go Beyond non-profit organization*

3. Please affirm that you have read Article 56 of the New York State Education Law and understand the relationship between a charter school and the charter entity as defined in therein. A copy of Article 56 can be found on the CSO website.

☒ I affirm. Initials *JW*

4. Please affirm that you have read and understand the charter, including the Bylaws, and all policies of or relating to the charter school.

☒ I affirm. Initials *JW*

5. Please affirm that you are or will be at least 18 years old at the time of your appointment/election to the board.

☒ I affirm. Initials *JW*

6. Please provide as an attachment and affirm that the academic and/or professional credential(s) or qualification(s) presented herein is/are true, accurate, and genuine.

☒ I affirm. Initials *JW*

7. Please provide a copy of your diploma and official transcript from your highest level of education (e.g. high school). If such documents cannot be provided, provide a signed and notarized letter setting forth the highest level of education obtained and the reason why these documents cannot be provided, including a description of the good faith efforts made to obtain them.

☒ Attached. Initials *JW*



8. Have you ever had any application for a teaching, professional, or vocational credential (i.e. license, certificate, or registration) in New York or any other jurisdiction denied?

☒ No.  
☐ Yes.

If yes, please provide an explanation.

9. Have you ever surrendered a teaching, professional, or vocational credential (i.e. license, certificate, or registration) or had such credential revoked, suspended, invalidated, or otherwise subjected to a disciplinary penalty in any jurisdiction?

☒ No.  
☐ Yes.

If yes, please provide an explanation.

10. Are you the subject of any pending investigation and/or disciplinary charge(s) for professional misconduct in any jurisdiction?

☒ No.  
☐ Yes.

If yes, please provide an explanation.

11. Please indicate whether or not you have ever been convicted of a misdemeanor and/or felony in a State or federal court in any jurisdiction.

☒ No.  
☐ Yes.

If the answer to this question is yes, please provide the following details regarding your conviction(s): (1) the name of the criminal offense(s); (2) whether the criminal offense(s) was a misdemeanor or felony; (3) the facts and circumstances surrounding your conviction(s); (4) the date(s) of your conviction(s); and (5) the date(s) of disposition(s).



Your response to question 11 may also include any relevant written information that you wish to be considered, including, but not limited to: certificates of conviction; any parole or probation documentation; any certificates, including any certificates of relief from disabilities; any proof of counseling and/or rehabilitation; any documentation attesting to your good conduct or good character; and any letters of support from friends, family, co-workers, employers, etc.

12. Please indicate if you currently have any criminal charge(s) pending against you in a State or federal court or in any jurisdiction.

☒ No.

☐ Yes.

If yes, please provide an explanation.

13. What board position(s) and/or offices(s) will you hold on this board? (e.g. member, parent representative, vice-president, finance committee, etc.).

*member*

14. Please indicate whether you have previously served or are currently serving on a board of a school district, a non-public school, or any not-for-profit corporation (to the extent not otherwise indicated in your response to Item 1, above). In addition, please describe any other experience, knowledge, or skills you feel is relevant to service on the board.

☐ No.

☒ Yes. (Include description here):

*Allendale Columbia School*



### Statement of Intent

15. Please provide a personal statement regarding the experience, skills, and commitment that you bring to the board and why you wish to serve.

My wife & I have raised 2 daughters; I helped my sister who is a single mother raise my 2 nephews. I'm passionate about helping young men of color succeed in life.

16. If applicable, please provide any other information that you feel is pertinent to the CSO's review of your background.

### Conflict of Interest

17. Please indicate whether you, your spouse, or other family member know(s) any of the past, current, or proposed board members.

☒ No.

☐ Yes.

If yes, please indicate the precise nature of your relationship:

18. Please indicate whether you, your spouse, or other family member know(s) any person who is a past, current, or prospective employee of the charter school, education corporation, and/or an entity that provides comprehensive management services ("CMO") (as defined by the guidance from the CSO entitled *Definition of an Entity that Provides Comprehensive Management Services*), whether for-profit or not-for-profit, which contracts with the charter school or education corporation.

☒ No.

☐ Yes.

If yes, please indicate the precise nature of your relationship.



19. Please indicate if you, your spouse, or other family member, or any corporation, business or other entity in which you, your spouse, or other family member serve(s) as an employee, officer, or director, or own a controlling interest in, contracts or does business with, or plan(s) to contract or do business with, the charter school, education corporation, and/or a CMO, whether for-profit or not-for-profit, including, but not limited to, the lease of real or personal property to the said entities.

☒ No.

☐ Yes.

If yes, please describe the nature of the contract or business and, if applicable, the relationship of the person to the corporation, business or entity involved.

20. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member know(s) any employees, officers, owners, directors, or agents of the CMO.

☒ No.

☐ Yes.

If yes, please indicate the precise nature of your relationship.

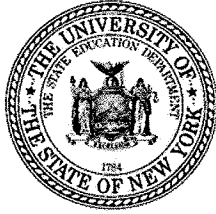
21. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member have/has a direct or indirect ownership, employment, or contractual or management interest in the CMO.

☒ No.

☐ Yes.

If yes, please provide a detailed description.





22. If the charter school is partnered with a CMO, whether for-profit or not-for-profit, please indicate whether you, your spouse, or any family member anticipate(s) conducting, or is conducting, any business with the CMO.

☒ No.  
☐ Yes.

If yes, please indicate the precise nature of the business that is, or will be, conducted.

23. Please indicate any potential ethical or legal conflicts of interests that would, or are likely to, exist should you be approved for service on the board.

*N/A*

24. Please explain how you would handle a situation in which you believe one or more members of the board are involved in working for their own benefit, or the benefit of their friends and family.

*Address the situation by approaching/  
calling a meeting with that individual to discuss.*

25. Please indicate whether you, your spouse or other family member is a director, officer, employee, partner or member of, or is otherwise associated with, any organization which filed an application in conjunction with the charter school, i.e., is partnered with the charter school. To the extent you have provided this information in response to the previous items 17-24, you may so indicate.

☒ No.  
☐ Yes.

If yes, please indicate the nature of your relationship:

### **Educational Philosophy**



26. Please explain your understanding of the charter school's mission, philosophy, and educational program.

*Preparing leaders of character.*

27. Please indicate your understanding of the role of the board and the relationship with the charter school's charter entity.

*Be an active advocate + ambassador for Vertus' Values, mission + vision.*

28. Please indicate what you believe to be the characteristics of a successful charter school. In particular, please provide the specific steps you think the board of a charter school will need to take to ensure that the school is and remains successful.

*Effective planning, utilizing resources + managing them effectively, maintain integrity + accountability, be a pillar in the community.*

29. Please provide any other information that you feel is pertinent to SED's review.

*I've had multiple opportunities to be involved with the school + see firsthand what the mission is + I feel based on my background, I could add value to what the school + the direction.*



## STATEMENT OF ASSURANCE

I, Jeffrey Wynn (name of proposed board member) declare and affirm that the statements made herein, including any accompanying documents, are true, complete, and correct. I understand that any false or misleading information or documentation contained herein may be grounds for disapproval of my appointment, and may result in criminal prosecution.

**This form must be signed and dated in the presence of a notary public.**

[Redacted Signature] 5/7/25  
Signature Date

State of New York

)ss.:

County of Monroe

On the 7<sup>th</sup> day of May in the year 2025, before me, the undersigned notary public, personally appeared Jeffrey Wynn, personally known to me or proved to me on the basis of satisfactory evidence to be the individual(s) whose name(s) is (are) subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

[Redacted Signature]

Notary Public

*last revised 08/21/2018*

LORI FISCHER  
Notary Public, State of New York  
No. 01FI6359448  
Qualified in Monroe County  
Commission Expires 5/30/2025

**BY-LAWS OF VERTUS CHARTER MIDDLE SCHOOL**  
A New York Education Corporation

**ARTICLE I NAME**

Section 1.1 Name. The name of this corporation is Vertus Charter Middle School (the “Corporation”).

**ARTICLE II PURPOSE**

Section 2.1 Purpose. The Corporation has been organized as set forth in the Articles of Incorporation. The Corporation will take no action that is inconsistent with the Articles of Incorporation or these Bylaws.

**ARTICLE III OFFICE**

Section 3.1 Offices. The Corporation’s principal office shall be located at 21 Humboldt St., Rochester, N.Y. 14609. The Board may change the location of the Corporation’s principal office.

**ARTICLE IV BOARD OF TRUSTEES**

Section 4.1 Powers. Subject to any limitations in the Articles of Incorporation, all powers and activities of the Corporation shall be exercised and managed by the Board of Trustees of the Corporation (the “Board”). Trustees shall have no power as individual trustees and shall act only as members of the Board. The Board may delegate the management of the activities of the Corporation to others, so long as the affairs of the Corporation are managed, and its powers exercised, under the board’s ultimate jurisdiction.

Section 4.2 Number of Trustees. The authorized number of trustees shall be not less than five and no greater than fifteen, with the exact number of authorized trustees to be fixed by the Board from time to time. The number of trustees elected at the most recent election shall constitute the exact number of trustees, unless otherwise fixed by Board resolution.

Section 4.3 Chief Executive Officer. The Chief Education Officer shall be the Chief Executive Officer of the Education Corporation and the Chief Education Officer and shall be responsible for the day-to-day decision making for the School.

Section 4.4 Term of Office. Each trustee shall be elected for a term of 3 years and shall hold office until a successor has been elected and qualified. New Board members may be elected at any time to fill vacancies. If a Board member is elected at a time other than the annual meeting, his or her 3-year term shall be calculated starting from the date of the upcoming annual meeting.

Section 4.5 Resignation. A trustee may resign at any time by giving written notice to the Chair of the Board or the Secretary. Any resignation shall take effect upon receipt of notice or at any later time specified in that notice. Unless otherwise specified in the notice of resignation, affirmative acceptance of the resignation shall not be necessary to make it effective. If the resignation specifies a later effective date, a successor may be elected prior to such effective date to take office when the resignation becomes effective.

Section 4.6 Removal. A trustee may be removed from office at any time by a vote of a majority of the trustees then in office in accordance with the process required by NY Education Law 226(8).

Section 4.7 Vacancies. A vacancy in the Board shall be deemed to exist in the event that the actual number of trustees is less than the authorized number for any reason. The Board may declare vacant the office of any trustee who has been declared of unsound mind by a final order of court or has been convicted of a felony. Vacancies on the Board may be filled by approval of the Board of Trustees or, if the number of trustees then in office is less than a quorum, by (1) unanimous written consent of the trustees then in office, (2) a vote of a majority of the trustees then in office at a meeting called in accordance with Sections 6.3 and 6.4, or (3) a sole remaining trustee. Each trustee elected or appointed to fill a vacancy shall hold office for the unexpired portion of the term, or until his or her death, resignation, or removal from office.

Section 4.8 Compensation of Trustees. Trustees shall not receive any compensation for their services as trustees or for any other goods or services. The Board may authorize the advance or reimbursement to a trustee of actual reasonable expenses incurred in carrying out his or her duties as a trustee.

Section 4.9 Committees of the Board. A committee of the board shall have the authority to bind the corporation and shall be comprised solely of Trustees. The Board shall elect trustees to serve on an Audit and Finance Committee of the Board. The Board may establish other Committees of the Board consisting of at least three Trustees with such powers and duties and the Board may prescribe.

4.9(a) Election of Members to Committees of the Board. The members of each Committee of the Board shall be elected by a majority of the entire Board. The Board may choose to elect alternate committee members.

4.9(b) Audit and Finance Committee of the Board. The board shall have an Audit and Finance Committee that shall consist of at least three (3) Trustees. The Committee shall:

1. Advise the Treasurer and Board regarding the investments and general fiscal policies of the School;
2. Oversee the accounting and financial reporting processes of the School;
3. Oversee the audit of the School's financial statements;
4. Annually review or retain an independent auditor;
5. Review with the independent auditor the scope and planning of the audit prior to the audit's commencement;
6. Upon completion of the audit, review the results of the audit and any related management letter with the independent auditor including:
  - a. Any material risks and weaknesses in internal controls identified by the auditor;
  - b. Any restrictions placed on the scope of the auditor's activities or access to requested information;
  - c. Any significant disagreements between the auditor and management; and
  - d. The adequacy of the corporation's accounting and financial reporting processes.
7. Annually consider the performance and independence of the auditor; and
8. Report on the Committee's activities to the Board.

Section 4.10 Committees of the Corporation. The Board by resolution may appoint from time to time any number of persons as advisors of the Corporation to act as a committee or committees of the Corporation. No such committee shall have the authority to bind the Board. Each advisor shall hold office during the pleasure of the Board and shall have only the obligations as the Board may from time to time determine.

4.10(a) No Compensation. No advisor to the Corporation shall receive, directly or indirectly, any salary or compensation for any service rendered to the Corporation as a member of a Committee of the Corporation, except that the Board may authorize reimbursement of expenditures reasonably incurred on behalf of the activities for the benefit of the Corporation and authorized in advance by the Board.

## **ARTICLE V MEETINGS**

Section 5.1 Annual Meeting. An annual meeting of the Board shall be held in May each year and will coincide with the regular meeting.

Section 5.2 Regular Meetings. Regular meetings of the Board shall be monthly throughout the year and at other times as the Board determines. Meetings shall be at the principal office or at such other place as the Board may designate and shall be open to the public in accordance with NY Open Meetings Law requirements.

Section 5.3 Quorum and Voting. A majority of the total number of seated trustees shall constitute a quorum for the transaction of business. The vote of a majority of the trustees then in office shall be the act of the Board. Except as otherwise provided in these Bylaws or in the Articles of Incorporation of this Corporation, or by law, no business shall be considered by the Board at any meeting at which a quorum is not present, and the only motion which the Chair of the Board shall entertain at such meeting is a motion to adjourn. The trustees present at a duly called and held meeting at which a quorum is initially present may continue to do business notwithstanding the loss of a quorum at the meeting due to a withdrawal of trustees from the meeting, provided that no action may be taken by the Board without a majority vote of the trustees then in office, or the Articles of Incorporation or these Bylaws.

Section 5.4 Video Participation in Meetings. A quorum of Trustees must be present, in person or via videoconferencing in accordance with Article 7 of the Public Officers Law, to lawfully conduct a Board meeting. If videoconferencing is used to conduct a meeting, the public notice for the meeting shall inform the public that videoconferencing will be used, identify the locations for the meeting, including the videoconferencing site, and state that the public has the right to attend the meeting at any of the locations. Once a quorum is present, additional Trustees may participate in a Board meeting through the use of conference telephone or similar communication equipment to the extent permitted by Article 7 of the Public Officer's Law, so long as all Trustees participating in such meeting can hear one another and there is no objection from any Trustee or any person in the public audience. The Board may also adopt the hybrid meeting procedures pursuant to New York Open Meetings Law 103-a(2) by resolution of the Board of Trustees.

Section 5.5 Notice and Waiver of Notice. Notice of the time and place of every meeting of the Board shall be mailed not less than five (5) nor more than ten (10) days before the meeting to the usual address of every Trustee, unless notice is waived. Notice will be deemed given when deposited in the United States mail, addressed to the Trustee at the address showing for the Trustee in the Corporation's

records, first-class postage pre-paid; when personally delivered in writing to the Trustee; or when faxed, e-mailed, or communicated orally, in person or via telephone, to the Trustee. Public notice of Board meetings shall be consistent with Article 7 of the Public Officers Law (Open Meetings Law). Notice of a meeting of the Board need not be given to any Trustee who submits a waiver of notice before or after such meeting, or who attends the meeting without protesting, prior thereto or at its commencement, the lack of notice to such Trustee. The waiver of notice may be written or electronic. If written, the waiver must be executed by the applicable Trustee by any reasonable means, including but not limited to facsimile signature. If electronic, the transmission of the waiver must be sent by electronic mail and must contain or be accompanied by information reasonably showing that the transmission was authorized by the Trustee. A waiver of notice may provide for notice of a meeting of the Board via alternate means, including, but not limited to four (4) days' notice of the meeting via first-class mail or two (2) days' notice of the meeting via telephone, e-mail, facsimile or personal delivery. The Secretary shall incorporate all such waivers, consents and approvals into the minutes of the meeting. This provision shall not permit waiver of the public notice provisions contained in Article 7 of the Public Officers Law. Where a meeting is scheduled within one week of the meeting date, Trustees shall be notified of such meeting as soon as practicable, and notice shall be published and given to the news media within a reasonable time before the meeting.

## **ARTICLE VI CERTAIN MATTERS**

Section 6.1 Board-Approved Policies. The Board may adopt additional governance and management policies as it deems appropriate.

Section 6.2 Executive Compensation Review. The Board (or a Board Committee) shall establish and review any compensation package (including all benefits) of the Chief Executive Officer. The Board shall approve such compensation only after determining that the compensation is just and reasonable. This review and approval shall occur annually, as well as when such CEO is hired, when the term of employment of such CEO is renewed or extended, and when the compensation of the CEO is modified, unless the modification applies to substantially all of the employees of the Corporation.

## **ARTICLE VII OFFICERS**

Section 7.1 Officers. The officers of the Corporation shall be a Chair of the Board, a Secretary, and a Treasurer. The Corporation may also have such other officers as may be determined by the Board. One person may hold two or more offices, except that neither the Secretary nor the Treasurer may serve concurrently as the Chair of the Board.

Section 7.2 Election and Term. The officers of the Corporation shall be elected by the Board at an annual meeting and shall serve at the pleasure of the Board.

Section 7.3 Chair of the Board. The Chair of the Board shall, if present, preside at all meetings of the Board, and shall exercise and perform such other powers and duties as may be prescribed by these Bylaws or the Board.

Section 7.4 Secretary. The Secretary shall keep or cause to be kept a full and complete record of the proceedings of the Board and its committees, shall give or cause to be given notice of all Board meetings as required by law or these Bylaws, and in general shall exercise and perform such other powers and duties as may be prescribed by these Bylaws or the Board.

Section 7.5 Treasurer. The Treasurer shall be the chief financial officer of the Corporation. The Treasurer shall keep and maintain, or cause to be kept and maintained, adequate and correct books and records of account. The Treasurer shall send or cause to be given to the trustees such financial statements and reports as are required to be given by law, the school's Authorizer, and as may be prescribed by these Bylaws or the Board. The books of account shall be open to inspection by any trustee upon request at all reasonable times. The Treasurer shall deposit, or cause to be deposited, all money and other valuables in the name and to the credit of the Corporation with such depositories as designated by the Board, shall disburse or cause to be disbursed the Corporation's funds as ordered by the Board, shall render to the Board, upon request, an account of the Treasurer's transactions as Treasurer and of the financial condition of the Corporation, and shall exercise and perform such other powers and duties as may be prescribed by these Bylaws or the Board.

Section 7.6 Resignation. A Trustee may resign by giving written notice to the Chair or the Secretary. The resignation is effective upon receipt of such notice, or at any later date specified in the notice. The acceptance of a resignation by the President or the Secretary shall not be necessary to make the resignation effective, but no resignation shall discharge any accrued obligation or duty of a Trustee. If any Trustee shall fail to attend three (3) consecutive meetings without an excuse accepted as satisfactory by the Board, he or she shall be deemed to have resigned, and the vacancy shall be filled.

Section 7.7 Removal. Officers may be removed from office by the Board by a vote of a majority of the trustees present.

Section 7.8 Vacancies. A vacancy in any office for any reason shall be filled by the Board at any regular or special Board meeting upon motion.

## **ARTICLE VIII INDEMNIFICATION**

Section 8.1 Definitions. For purposes of this Article, "Agent" means any person who is or was a trustee, officer, employee or other agent of the Corporation, or is or was serving at the request of the Corporation as a trustee, officer, employee or other agent of another foreign or domestic corporation, partnership, joint venture, trust or other enterprise; "Proceeding" means any threatened, pending or completed action or proceeding, whether civil, criminal, administrative or investigative; and "Expenses" includes, without limitation, attorneys' fees and any expenses incurred in establishing a right to indemnification under Section 9.2 of this Article.

Section 8.2 Right to Indemnity. The Corporation may, to the fullest extent permitted by law, indemnify any person who was or is a party or is threatened to be made a party to any Proceeding by reason of the fact that such person is or was an Agent of the Corporation, against Expenses, judgments, fines, settlements and other amounts actually and reasonably incurred in connection with the Proceeding.

Section 8.3 Approval of Indemnity. On written request to the Board by any Agent seeking indemnification, to the extent that the Agent has been successful on the merits, the Board shall promptly authorize indemnification in accordance with law. Otherwise, the Board shall promptly determine, by a majority vote of a quorum consisting of trustees who are not parties to the Proceeding, whether, in the specific case, the Agent has met the applicable standard of conduct stated, and, if so, may authorize indemnification to the extent permitted thereby.



Section 8.4 Advancing Expenses. The Board may authorize the advance of Expenses incurred by or on behalf of an Agent of the Corporation in defending any Proceeding before the final disposition of such Proceeding, if the Board finds that:

- a) the requested advances are reasonable in amount under the circumstances; and
- b) before any advance is made, the Agent submits a written undertaking satisfactory to the Board, in its sole discretion, to repay the advance unless it is ultimately determined that the Agent is entitled to indemnification for the Expenses under this Article.

Section 8.5 Insurance. The Board shall have the power to purchase and maintain insurance on behalf of any Agent against any liability asserted against or incurred by the Agent in such capacity or arising out of the Agent's status as such, whether or not the Corporation would have the power to indemnify the Agent against such liability under this Article.

#### **ARTICLE IX FISCAL YEAR AND REPORTING OBLIGATIONS**

Section 9.1 Fiscal Year. The fiscal year of the Corporation shall begin on July 1 and end on June 30.

#### **ARTICLE X GIFTS, GRANTS, CONTRACTS, INVESTMENTS**

Section 10.1 Gifts. The Board may accept on behalf of the Corporation any contribution, gift, bequest or devise for the general purposes or for any specific purpose of the Corporation. The Corporation shall retain complete control and discretion over the use of all contributions it receives.

Section 10.2 Grants. The Board shall exercise itself, or delegate, subject to its supervision, control over grants, contributions, loans, and other financial assistance provided by the Corporation, including, without limitation, fiscal sponsorship relationships. The Board shall not authorize any grants, contributions, loans, or any other form of financial assistance to any trustee, officer or employee of the Corporation.

Section 10.3 Contracts. The Board shall authorize the Chief Executive Officer, in the name of and on behalf of the Corporation, to enter into any contract or execute any instrument by majority vote of the Board. Any such authority may be general or confined to specific instances, or otherwise limited. Consistent with actions by the Board, the Chair of the Board is authorized to execute such instruments on behalf of the Corporation.

Section 10.4 Payment of Money. Unless otherwise determined by the Board, all checks, drafts or other orders for payment of money out of the funds of the Corporation and all notes or other evidences of indebtedness of the Corporation may be signed on behalf of the Corporation by the Treasurer.

Section 10.5 Deposits. The funds of the Corporation not otherwise employed, including any amounts in any reserve fund, shall be deposited from time to time to the order of the Corporation in such banks, trust companies or other depositories as the Board may select.

Section 10.6 Investments. In investing, reinvesting, purchasing, acquiring, exchanging, selling and managing the Corporation's investments, other than assets which are directly related to the Corporation's public or charitable programs, the Board shall avoid speculation, looking instead to the permanent disposition of the funds, considering the probable income, as well as the probable safety of

the Corporation's capital. No investment violates this Section where it conforms to provisions authorizing the investment contained in an instrument or agreement pursuant to which the assets were contributed to the Corporation.

## **ARTICLE XI RELATED PARTY TRANSACTIONS**

Section 11.1 General. The Corporation shall not enter into a Related Party Transaction (as such term is defined herein), unless such Related Party Transaction is determined by the Board to be fair, reasonable and in the Corporation's best interest at the time of such determination.

Section 11.2. Definitions. For purposes of this Article XI, the following definitions shall apply:

- a) *"Related Party Transaction"* means any transaction, agreement or any other arrangement in which a Related Party (as such term is defined herein) has a financial interest and in which the Corporation or any Affiliate (as such term is defined herein) of the Corporation is a participant.
- b) *"Related Party"* means any (i) any Trustee, Officer or Key Employee of the Corporation or any Affiliate of the Corporation, (ii) any Relative (as such term is defined herein) of any Trustee, Officer or Key Employee of the Corporation or any Affiliate of the Corporation or (iii) any entity in which any individual described in (i) or (ii) above has a thirty-five percent (35%) or greater ownership or beneficial interest or, in the case of a partnership or professional corporation, a direct or indirect ownership interest in excess of five percent (5%).
- c) *"Relative"* of an individual means his or her spouse, ancestors, brothers and sisters (whether whole or half-blood), children (whether natural or adopted), grandchildren, greatgrandchildren and spouses of brothers, sisters, children, grandchildren and great- grandchildren and domestic partner.
- d) *"Key Employee"* means any person who is in a position to exercise substantial influence over the affairs of the Corporation.
- e) *"Affiliate"* of the Corporation means any entity controlled by, in control of, or under common control with the Corporation.

Section 11.3 Procedure. Any Trustee, Officer or Key Employee (as such term is defined herein) who has an interest in a Related Party Transaction shall promptly disclose in good faith to the Board, or an authorized committee thereof, the material facts concerning such interest prior to the Corporation entering in such transaction. Such disclosure shall include all relevant and material facts known to such person regarding the transaction which might reasonably be construed to be adverse to the Corporation's interest. The Board shall determine, by majority vote, whether the Related Party Transaction is fair, reasonable and in the Corporation's best interest at the time of such determination. In the event a Trustee is a party to a Related Party Transaction, such Trustee shall not vote on, nor use his or her personal influence on, nor be present during the discussion or deliberations with respect to, such Related Party Transaction (other than to present factual information or to respond to questions prior to the discussion). The minutes of the meeting shall reflect that the disclosure was made, the vote thereon and, where applicable, the abstention from voting and participation. In addition to the requirements of this Article XI, the Board has adopted conflict of interest policies (a) requiring that, among other things, prior to any formal action by the Board, any Trustee, Officer and Key Employee shall disclose existing and potential conflicts of interest, and (b) providing corrective and disciplinary actions with respect to transgressions of such policies.

Section 11.4 Extraordinary Related Party Transactions. With respect to any Related Party Transaction in which a Related Party has a substantial financial interest, the Board shall: (1) prior to entering into the transaction, consider alternative transactions to the extent available; (2) vote on the transaction, the standard for approval of which shall be a majority vote of the Board, as applicable; and (3) contemporaneously document in writing the basis for the Board's approval, including its consideration of any alternative transactions. The Related Party may not participate in the discussion or vote on the transaction.

## **ARTICLE XII OTHER PROVISIONS**

Section 12.1 Rights of Inspection. Every trustee shall have the right at any reasonable time to inspect and copy all books, records and documents, and to inspect the physical properties of the Corporation.

Section 12.2 Electronic Transmissions. Unless otherwise provided in these Bylaws, and subject to any guidelines and procedures that the Board may adopt from time to time, the terms "written" and "in writing" as used in these Bylaws include any form of recorded message in the English language capable of comprehension by ordinary visual means, and may include electronic transmissions, such as facsimile or email, provided (i) for electronic transmissions from the Corporation, the Corporation has obtained an unrevoked written consent from the recipient to the use of such means of communication; (ii) for electronic transmissions to the Corporation, the Corporation has in effect reasonable measures to verify that the sender is the individual purporting to have sent such transmission; and (iii) the transmission creates a record that can be retained, retrieved, reviewed, and rendered into clearly legible tangible form.

## **ARTICLE XIII AMENDMENTS**

Section 13.1 Amendment of Bylaws. Except as otherwise provided by law, these Bylaws may be amended or repealed and new bylaws may be adopted by approval of the Board and the school's Authorizer.

\* \* \* \* \*

## **CERTIFICATE OF SECRETARY**

I, \_\_\_\_\_ hereby certify:

That I am duly elected and acting Secretary of Vertus Charter Middle School, and that the foregoing Bylaws constitute Bylaws of Vertus Charter Middle School, as duly adopted at the meeting of the Board held on \_\_\_\_\_. IN WITNESS WHEREOF, I have hereunder subscribed my name this \_\_\_\_ day of \_\_\_\_\_, 2025.

\_\_\_\_\_  
Secretary

## **Attachment 5c: Vertus Charter Middle School Code of Ethics**

The public purpose and tax-exempt status of charitable organizations imposes a special obligation to maintain the public trust. The Board of Trustees and senior staff of Vertus Charter Middle School (Vertus Middle) must conduct their affairs in the best interests of the school; avoid conflict, or the appearance of conflict, between their personal interests and those of Vertus Middle; and ensure that they do not receive improper personal benefit from their positions. Accordingly, the Vertus Middle Board of Trustees (the “Board”) has adopted the following procedures to govern decision-making processes. Moreover, Board Members, experts, advisors, and Vertus Middle staff of any level are subject to the gift policy set forth below.

- Trustees, officers, or employees of any external organization shall hold no more than 40 percent of the total seats comprising the Board of Trustees.
- Trustees shall make all appropriate financial disclosures whenever a grievance of conflict of interest is lodged against them.
- Trustees, officers, and employees may never ask a subordinate, a student, or a parent of a student to work on or give to any political campaign.
- Trustees, officers, and employees will exercise the highest degree of care not to disclose confidential information including, but not limited to:
  - Student records
  - Financial information
  - Personnel records
  - Payroll records
- Trustees, officers, and employees will observe rules of behavior and conduct. Unacceptable conduct includes, but is not limited to:
  - Theft or inappropriate removal or possession of property
  - Falsification of documents
  - Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace or while on duty
  - Use of tobacco or tobacco products on school grounds
  - Insubordination or other disrespectful conduct
  - Violation of safety or health rules
  - Sexual or other unlawful or unwelcome harassment
  - Excessive absenteeism or any absence without notice

### **Conflict of Interest Procedures and Definitions**

1. Board Members shall disclose to the Board their Interest, as defined below, with respect

to a transaction the Board is considering. Such transactions include contracts and the provision of services. The disclosure of an Interest may be made orally or in writing. A Board Member has an Interest if the Board Member or, to the Board Member's knowledge, the Board Member's Family Member (including parent, grandparent, spouse, sibling, child, grandchild, niece, or nephew), or close business associate (i) is employed by, or (ii) holds a fiduciary, significant owner, or senior position with, any entity or person with which Vertus Middle is considering a transaction. Unless the Board requests their presences, Board Members with Interests shall recuse themselves from the Board's consideration of the relevant transaction. In no event shall Board Members vote on transactions in which they have a financial interest. The nature of the Interest and the individual's recusal, or Board determination not to recuse, shall be recorded in the appropriate minutes. In addition, the Board expects Board Members to disclose close friendships with (a) any person with whom Vertus Middle is considering a transaction, and (b) any person who has a significant position in an entity with which Vertus Middle is considering a transaction.

2. Vertus Middle senior staff (including, but not limited to, the CEO or any other employee, expert or advisor who is in a position to influence a decision in which he/she has an Interest) shall disclose to the CEO (or CEO's designee), orally or in writing, any Interest as defined above, and shall, unless the CEO (or CEO's designee) determines otherwise, recuse her- or himself from the decision-making process. The Procedures set forth in the preceding sentence shall also apply to any Board Member who has knowledge that he/she has an Interest in a transaction being considered by Vertus Middle below the Board level. The nature of the Interest and the individual's recusal, or the Chair's determination not to require recusal, shall be memorialized in writing. In addition, the persons listed in the first sentence of this paragraph shall disclose close friendships with (a) any person with whom Vertus Middle is considering a transaction, and (b) any person who has a significant position in an entity with which Vertus Middle is considering a transaction.
3. No Board Member or staff member shall accept or solicit payments for expenses associated with Vertus Middle-related travel, meals, or other professional activity from actual or potential suppliers of Vertus Middle. No person listed in the previous sentence shall receive or solicit a gratuitous payment or article of monetary value worth \$50 or more from actual or potential suppliers of services or goods for Vertus Middle, except (a) gifts presented to Vertus Middle where the recipient is representing Vertus Middle and thereafter presents the gift to Vertus Middle, or (b) gifts that are motivated solely by a family or personal relationship, but are in no way connected with the recipient's official Vertus Middle duties. In general, a recipient should make every effort to decline to accept gifts on behalf of Vertus Middle, but, in cases where it would be considered ungracious to do so, should make clear that the gift is being accepted on behalf of, and will be given to, Vertus Middle.
4. Additional Conflict of Interest Provisions for all Trustees, Officers and Employees
  - a. The conflict of interest provisions of the New York General Municipal Law are

applicable to charter schools to the same extent those provisions (Gen. Municipal Law §§800-804, 804-a, 805, 805-a, 805-b, 806) are applicable to school districts. All trustees, officers and employees shall comply with such laws.

- b. No trustee, officer or employee shall:
  - i. Directly or indirectly, solicit any gift, or accept or receive any gift having a value of seventy---five dollars or more, whether in the form of money, service, loan, travel, entertainment, hospitality, thing or promise, or in any other form, under circumstances in which it could reasonably be inferred that the gift was intended to influence him, or could reasonably be expected to influence him, in the performance of his official duties or was intended as a reward for any official action on his part;
  - ii. Disclose confidential information acquired by him in the course of his official duties or use such information to further his personal interests;
  - iii. Receive, or enter into any agreement, express or implied, for compensation for services to be rendered in relation to any matter before any municipal agency of which he is an officer, member or employee or of any municipal agency over which he has jurisdiction or to which he has the power to appoint any member, officer or employee;
  - iv. Receive, or enter into any agreement, express or implied, for compensation for services to be rendered in relation to any matter before any agency of his municipality, whereby his compensation is to be dependent or contingent upon any action by such agency with respect to such matter, provided that this paragraph shall not prohibit the fixing at any time of fees based upon the reasonable value of the services rendered;
- c. Trustees, officers and employees must disclose any contract with not---for---profit entities, such as charter management organizations, partners and founding organizations.
- d. Any officer or employee who has, will have, or later acquires an interest in-----or whose spouse has, will have, or later acquires an interest in-----any actual or proposed contract, purchase agreement, lease agreement or other agreement, including oral agreements, with the municipality of which he or she is an officer or employee, shall publicly disclose the nature and extent of such interest in writing to his or her immediate supervisor and to the governing body thereof as soon as he or she has knowledge of such actual or prospective interest. Such written disclosure shall be made part of and set forth in the official record of the proceedings of such body.

All trustees, officers, and employees of the school will be given a copy of the code of ethics upon their employment of association with the school.

## **Attachment 8a: Hiring and Personnel Policies and Procedures**

Vertus Middle will utilize the fully developed 160-page employee handbook that Vertus High has developed. However, key policies, including the hiring, evaluation, and complaint processes are included below. Additionally, job descriptions are included for key personnel.

**Hiring Process:** While the CEO has final authority to hire staff members, he or she may delegate conduct of the hiring process to other administrators or committees. All job applicants must fill out completely and sign an application for employment. In addition, all job applicants must:

- Provide an up to date resume; where applicable, supply proof of teaching certification and qualification pursuant to No Child Left Behind (NCLB) (such as college matriculation, copies of school transcripts); and be interviewed by CEO and/or his or her delegate, including demonstrations of teaching or other relevant skills and qualifications.

The hiring process will include the following additional mandatory steps:

- At least two references checked, credentials verified, qualifications confirmed;
- Documentation of employment eligibility, i.e., proof of identity and legal authority to work in the United States;
- Fingerprinting and a criminal background check and clearance; and
- The candidate's signature on an offer letter confirming the offered position.

Refusal to comply with any of the above requirements or the falsification of information, or the inability to provide proof of legal authority to work in the U.S. will result in the individual not being hired or the job offer being rescinded.

**Evaluation:** Performance evaluations are an essential component of staff development. They are conducted for all staff and provide an opportunity to discuss plans for professional growth and development. At the beginning of each year staff will develop measurable goals for the year that will inform subsequent evaluation. Each year each staff member will receive a written performance evaluation from his or her supervisor. To ensure consistency, the CEO will review all performance evaluations prior to their delivery. The performance evaluation will consider evidence gathered throughout the school year, including achievement of goals, formal and informal observations of practice, parent, student, and peer survey results and feedback, student performance data, and attendance and punctuality. Performance evaluations will be delivered in meetings that include in-depth discussion of strengths and challenges. The written performance evaluation and any written comments become part of the staff member's personal file. Performance evaluations will be used to determine retention, placement, compensation and performance bonuses.

The school may use the following mechanisms to inform staff if their performance is below expectations: oral and written warnings, improvement plans and suspension. Employees may also be terminated for misconduct and/or poor job performance (see termination section below). All staff will receive ongoing staff development through trainings, coaching and mentoring. Staff that demonstrate a deficiency in any aspect of their responsibilities will receive additional assistance. If the deficiency continues, the staff member will be dismissed. The CEO is directly responsible to the Board of Directors. In the event of failure in the performance of his/her duties,

he/she will be dismissed. Evaluations are among the factors considered in determining salary increases. Other factors include, but are not limited to, competitive data, the financial resources of Vertus and the general state of the economy.

**Termination:** Each employee will be employed on an “at will” basis. The Board of Trustees has the authority to terminate an employee with or without cause, unless such termination would violate applicable law. Offenses which can result in immediate dismissal include, but are not limited to:

1. Poor job performance.
2. Possession, use, sale, purchase, or distribution on school property, or reporting to work under the influence, of a drug and/or alcohol.
3. Falsifying or altering records.
4. Theft of school property or sabotaging or willfully damaging school equipment or the property of other employees.
5. Insubordination involving, but not limited to, defaming, assaulting, or threatening to assault a supervisor, and refusing to carry out the order of a supervisor.
6. Fighting or provoking a fight on school premises.
7. Absence for three days without notice, in which event the employee will be deemed to have quit voluntarily.
8. Working for another employer while on leave without consent of the school.
9. Carrying concealed weapons on school property or during any school-sponsored event.
10. Treating a student in a cruel or inappropriate way.
11. Failure to perform professional duties.
12. Undermining the Vertus values or code of ethics.

**Complaint process for staff:** Our Complaint Policy, posted on our website and in our family handbook, provides formal mechanisms to raise concerns in the appropriate channel. Concerns can be brought directly to our Board informally or through the formal Complaint Policy. Concerns brought to any Board member are immediately shared with the Board Chair. If needed, the item is added to the agenda and discussed at the Board’s next monthly meeting, where action can be taken. Additionally, each Board meeting has a standing public session item on the agenda where all public members are welcome to address the Board on any topic. Board meeting dates and times are posted on the school’s website, containing meeting agendas and minutes. In the current and third renewal term, no concerns were brought to the Board or Authorizer.

**Equal Opportunity Employer:** It is the policy of Vertus Charter Middle School to seek and employ the best-qualified personnel without regard to sex, race, religion, color, creed, national origin, citizenship, sexual orientation, veteran status age, marital status, or disability. It is further this organization's policy to ensure equal opportunity for the advancement of staff members and equal treatment in the areas of upgrading, training, promotion, transfer, layoff, and termination. Vertus will comply with the American with Disabilities Act (ADA) of 1990, and welcomes applications from people with disabilities. The school does not discriminate against qualified, disabled individuals solely for reasons of their disability. Consistent with this policy, Vertus is committed to: Recruit, hire and promote on the basis of an individual’s qualifications and competence for the job; Make the necessary, reasonable accommodations to enable a qualified



person with a disability to perform the essential functions of a job; Protect the disabled individual's right to privacy and confidentiality to the extent possible; and Full compliance with all requirements of applicable law, including those relating to employee benefits.

**Harassment:** Vertus is committed to maintaining a workplace free from all forms of harassment and discrimination. The School prohibits unlawful harassment and discrimination against anyone, for any reason, including, but not limited to an individual's actual or perceived: race (including traits historically associated with race, such as hair texture and protective hairstyles), color, creed, religion (including wearing attire, clothing or facial hair in accordance with the tenets of religion), sex (including pregnancy, childbirth or related medical conditions and transgender status), gender identity or expression, an employee's or dependent's reproductive health decisions, familial status, national origin, citizenship or immigration status, physical or mental disability (including gender dysphoria and being a certified medical marijuana patient), genetic information (including predisposing genetic characteristics), age (18 and over), veteran status, military status, sexual orientation, marital status, certain arrest or conviction records, domestic violence victim status and any other status protected by applicable law.

**Code of Ethics:** Vertus' code of ethics is dependent upon our core values, maintaining ethical standards and the personal integrity of every individual in our School. Each employee of the School is required to ensure that they and their family members do not improperly benefit personally from the employee's position as an employee for the School. For this reason, it is of paramount importance that we always conduct our day-to-day activities in an ethical and responsible manner. The full policy can be found in the Employee Manual.

**Job Descriptions:** A job description is written for each position in our school and maintained on file in a shared drive or may be requested from the Chief Executive Officer. The purpose of these job descriptions is to define job standards, essential functions, and physical requirements, as well as marginal or peripheral duties and reporting relationships for the various positions throughout our School.

<b>Chief Executive Officer (CEO)</b>
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The CEO is responsible for the overall success of Vertus Charter Middle School and reports to the Board of Trustees. Key responsibilities include the following:

**Organizational Leadership**

- Serve as a living example of Vertus' values and virtues.
- Lead strategic planning and continuous improvement efforts for Vertus.
- Establish and maintain a strong, positive school culture aligned with the school's mission.
- Foster a safe, orderly, and inclusive learning environment.
- Implement all school policies and procedures as directed by the Board of Trustees.

**Staff Management & Talent Development**

- Supervise the hiring, coaching, evaluation, and, when necessary, termination of all staff members.
- Supervise the Principal, Administrative Assistant, IT/technology, and outsourced ops vendors (finance, HR)
- Provide regular observation, feedback, and coaching to all direct reports to ensure high staff

performance.

- Design and oversee leadership development and comprehensive professional development programs for staff.

#### **Academic Program Leadership**

- Implement the school's educational program with fidelity to the charter.
- Ensure development and delivery of high-quality curriculum, instruction, and assessments.
- Ensure the proper use of student data to improve instruction and student outcomes.
- Provide direction for and review character education and career readiness programs alongside senior staff.

#### **Family and Community Engagement**

- Facilitate and encourage active parent, community, and partner involvement.
- Represent Vertus Middle externally to partners, funders, and broader communities.
- Serve as primary liaison to the New York State Education Department and other oversight bodies.
- Respond to grievances and concerns from parents and staff professionally and promptly.
- Ensure the school meets all academic and operational accountability benchmarks.

#### **Finance and Budget Management**

- In collaboration with the outsourced accounting firm, oversee budgeting and financial management.
- Ensure proper financial oversight and allocation of resources aligned with strategic priorities.
- Maintain fiscal responsibility and ensure full compliance with financial policies and reporting requirements.

#### **Operations Oversight**

- Oversee the day-to-day operations of the school through direct supervision of senior operational staff.
- Ensure smooth execution of school functions, including transportation, food service, technology, facilities, safety, and student services.
- Support systems for student enrollment, attendance, scheduling, and compliance reporting.

#### **External Reporting and Compliance**

- Make formal reports to the Board of Trustees, the State Education Department, and other required agencies.
- Monitor compliance with federal, state, and local regulations, including charter mandates.
- Lead preparations for charter renewals, audits, accountability visits, and inspections.

#### **Evaluation, Policy, and Resource Management**

- Evaluate school programs and recommend policy updates and resource allocations to the Board.
- Track and monitor key performance metrics for academics, operations, and staff performance.
- Use data-driven decision-making to drive continuous improvement across all areas of the school.

#### **Qualifications:**

- Master's Degree in Education, Administration, or related field (required).
- New York State School Building Leader (SBL) or School District Leader (SDL) certification

(preferred).

- 7-10+ years of leadership experience in an educational setting, preferably charter or urban education.
- Proven track record of success in improving student achievement and staff performance.
- Strong experience managing high-performing teams, operations, and budgets.
- Deep understanding of academic accountability systems and data-driven instruction.
- Demonstrated commitment to the success of historically underserved students and families.

<b>Principal</b>
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The Principal is a leadership role that oversees academic and student facing functions necessary to run a high-performing school. Key responsibilities include the following:

**Organizational Leadership**

- Serve as a living example of Vertus' values and virtues.
- In partnership with the CEO, implement the campus-wide strategy that supports the academic and cultural vision of the schools
- Plays a leadership role in developing the school's strategic annual plan and academic and cultural trajectory.
- Hires, manages, coaches, and develops school academic team members and school support staff.
- Serves as "admin on duty" in the absence of the CEO and during coverage of athletic events or other extracurricular activities
- Oversees the planning and implementation of staff Professional Development Days and ensures alignment with the school vision, mission, and strategic outcomes.

**Academics:**

- Supervise Director of Curriculum & Assessment, Assistant Principal, Specialized Services Coordinator
- Oversee academic program to ensure alignment with our Charter
- Reviews and makes necessary changes to academic policy while ensuring alignment with our Charter
- Works with Assistant Principal on supervision and coaching of teachers and other academic staff
- Oversees school-wide academic data collection and review
- Oversee the systems, practices, and cycles of assessment and the constant use of data to drive student performance
- Pulls i-Ready reports and manages reporting, making remediation plans to address gaps in student learning
- Manages and develops growth plans for teachers and academic staff
- Responsible for overseeing the development of curriculum, including on and off-Edgenuity courses
- Develop assessment strategy, implementation, and data review in collaboration with CEO
- Implements data review process with the intent of achieving annual benchmark goals
- Ensures regular academic data review with students, staff, and families
- Ensures teacher accountability for lesson planning, grading, and other tasks as assigned
- Supervises Specialized Services Coordinator to ensure appropriate SPED processes,

compliance, and scheduling for service providers

- Works to ensure strong Teacher/Preceptor partnerships

**Student Culture:**

- Reviews seminar curriculum annually and manages efforts to adjust and implement it in the classroom
- Develops and implements a goal-setting process with the intent of increasing the pace of credit-earning/on-track metric
- Ties the virtues and the character strengths to academic success.
- Supervises Counselor & Social Worker
- Ensures staff complies with school behavior management and intervention policies and procedures
- Presents discipline data trends to the CEO along with proactive methods for improvement
- Aligns job responsibilities of support staff to ensure benchmark goals are met annually

**Career Readiness:**

- Oversee student scheduling to ensure students are on track
- Maintains Master Course Catalog with course names and credits

**Operations:**

- Works with CEO on academic reporting, record keeping, and systems
- Works with CEO on learning labs and technology needs, procurement, set up and maintenance
- Recruitment /Enrollment/Retention

**External Affairs:**

- Monthly Reports to the Board.
- Represents the School's mission and vision in the media.
- Thoughtfully engage and invest families and community stakeholders in Vertus' work

**Qualifications:**

- Bachelor's Degree (required) graduate degree (preferred)
- Experience in a school leadership role (required)
- A minimum of 5 years of experience in education or related fields (required)
- A commitment to working in under-served communities
- An unwavering commitment to anti-racism, diversity, equity, and inclusion, with an ability to serve as an exemplar for the organization's values and foster an inclusive and respectful workplace.
- Team player capable of working both collaboratively and independently
- Highly organized, resourceful, and accountable, with strong attention to follow through and detail
- Proactive and creative problem-solver; ability to identify, analyze, and recommend solutions
- Track record of exceptional results
- An unwavering commitment to Vertus' mission and willingness to go above and beyond to meet the needs of Vertus students, families, and staff

<b>Assistant Principal</b>
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Vertus Middle School Assistant Principal is an experienced educational leader who demonstrates a drive toward excellence and is passionate about serving all students. The Middle School AP is directly responsible for the coaching, growth, and evaluation of the teachers they supervise. The Middle School AP reports directly to the Principal.

**Key Responsibilities:**

- In collaboration with the CEO & Principal, identify academic priorities, set measurable goals to achieve priorities, and monitor progress towards goals
- Make decisions that are strategic, intentional, and grounded in data
- Thoughtfully engage and invest families and community stakeholders in Vertus' work
- Ensure that teachers' professional development goals are being met through direct, targeted coaching
- Partner with the leadership team to continually assess professional development needs and execute a differentiated approach to meet those needs
- Plans and executes on the delivery of summer and weekly professional development for teachers and leaders, including designing schedules, content, and lesson plans, and ensuring high-quality delivery of professional development aligned to our academic vision.
- Collaborate with the leadership to continually assess the development of instructional team members and execute a differentiated approach to meet their needs
- Oversee the systems, practices, and cycles of assessment and the constant use of data to drive student performance
- Implement school-wide procedures and policies to ensure student safety
- Work closely with the leadership team to recruit and select new staff members
- Ensures compliance of the Special Education Program through collaboration with the SPED Coordinator.
- Oversees and integrates the work of the Academic Intervention department into all academic priorities and drives improvement.
- Ensures region-wide state and federal academic compliance.
- Perform related duties as assigned

**Qualifications:**

- A commitment to working in underserved communities
- An unwavering commitment to anti-racism, diversity, equity, and inclusion, with an ability to serve as an exemplar for the organization's values and foster an inclusive and respectful workplace.
- Team player capable of working both collaboratively and independently
- Highly organized, resourceful, and accountable, with strong attention to follow through and detail
- Proactive and creative problem-solver; ability to identify, analyze, and recommend solutions
- Track record of exceptional results
- Outstanding content knowledge throughout grades 7 & 8, NYS standards, and testing requirements
- An unwavering commitment to Vertus' mission and willingness to go above and beyond to meet the needs of Vertus students, families, and staff

- 4+ years of teaching experience, preferably in an urban charter school
- Experience coaching teachers or managing adults, required
- Master's Degree in Education, preferred

<p><b>Director of Curriculum &amp; Assessment</b></p>
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The Director of Curriculum and Assessment is responsible for ensuring that Vertus's academic program is rigorous, engaging, aligned to standards, and effectively preparing students for success. This role leads the development, implementation, and evaluation of curriculum and assessments across content areas. The Director will work closely with teachers, school leaders, and the Assistant Principal to support high-quality instruction and data-driven decision-making. Key Responsibilities include:

**Curriculum Design and Alignment**

- Lead the development and refinement of curriculum across all subject areas to ensure alignment with New York State standards and Vertus' academic expectations.
- Maintain pacing guides, unit plans, and vertical alignment documents to ensure instructional coherence and progression.
- Support teachers in developing high-quality, engaging, and culturally relevant lesson plans and materials.
- Ensure that all curriculum supports diverse learners, including students with IEPs and English Language Learners.

**Assessment and Data Analysis**

- Oversee the design, implementation, and analysis of formative, interim, and summative assessments.
- Lead the school-wide data cycle, including collection, disaggregation, and analysis of assessment results.
- Train and support teachers in using assessment data to inform instruction and improve student outcomes.
- Coordinate standardized testing, including NYS exams, i-Ready, and internal benchmark assessments.

**Instructional Support and Professional Development**

- Collaborate with instructional leaders to deliver professional development focused on curriculum implementation, data analysis, and instructional best practices.
- Observe classroom instruction and provide feedback aligned to Vertus' instructional framework.
- Model effective instruction and co-plan with teachers as needed.
- Support new teacher onboarding and development related to curriculum and assessment.

**Compliance and Reporting**

- Ensure curriculum and assessment practices comply with New York State Education Department (NYSED) and charter requirements.
- Prepare academic performance reports for school leadership, board meetings, and external partners.
- Monitor and document student achievement progress to ensure school accountability measures are met.

## Qualifications

- A commitment to working in underserved communities
- An unwavering commitment to anti-racism, diversity, equity, and inclusion, with an ability to serve as an exemplar for the organization's values and foster an inclusive and respectful workplace.
- Team player capable of working both collaboratively and independently
- Highly organized, resourceful, and accountable, with strong attention to follow through and detail
- Proactive and creative problem-solver; ability to identify, analyze, and recommend solutions
- Track record of exceptional results
- Outstanding content knowledge throughout grades 7 & 8, NYS standards, and testing requirements
- An unwavering commitment to Vertus' mission and willingness to go above and beyond to meet the needs of Vertus students, families, and staff
- 4+ years of teaching experience, preferably in an urban charter school
- Experience coaching teachers or managing adults, required
- Master's degree in Education or related field
- NYS teaching certification
- Prior experience in curriculum leadership or instructional coaching preferred
- Deep understanding of standards-based instruction, assessment design, and data-driven instruction
- Commitment to Vertus's mission and core values

<b>Preceptor</b>
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This role supports the mission of Vertus Middle to develop Men of Character by mentoring, advocating for, and guiding students academically, socially, and behaviorally. Key responsibilities include:

### Academic Facilitation & Student Support

- Facilitate academics in the Learning Labs, ensuring students remain engaged and on task.
- Support students as they complete coursework, including Edgenuity, Regents preparation, and skill-building activities.
- Monitor and assess student academic progress, providing intervention and motivation as needed.
- Work closely with Teachers, Special Education Teachers, and Academic Intervention Specialists to support student learning.

### Character Education & Development

- Teach and model the Vertus Character Traits: Grit, Zest, Social Intelligence, Curiosity, Gratitude, Optimism, and being a Brother's Keeper.
- Lead discussions and activities that reinforce character development in students.
- Help students set personal and academic goals, holding them accountable for their growth.
- Provide guidance and real-world lessons on responsibility, leadership, and decision-making.

### Mentorship & Student Advocacy

- Serve as a full-time mentor and advocate, building strong relationships with students.
- Provide guidance and support for students in all areas of their academic and personal development.
- Address behavioral challenges in a proactive and restorative manner, reinforcing school expectations and values.
- Promote and reinforce character development, aligning with the Vertus Way and the school's mission.

#### **Family & Community Engagement**

- Act as the primary bridge between the school and parents/guardians, providing regular updates on student progress, attendance, and behavior.
- Communicate with families regarding student successes, concerns, and interventions.
- Work to strengthen family involvement in student learning and character development.

#### **Attendance & Student Accountability**

- Monitor and promote student attendance, ensuring students arrive on time and remain engaged throughout the day.
- Track and document student absences, tardiness, and patterns of disengagement, implementing interventions when needed.
- Support school-wide attendance initiatives and strategies to improve overall student attendance.

#### **Collaboration & Professional Responsibilities**

- Work closely with Teachers, School Leaders, and Support Staff to align academic and behavioral expectations.
- Participate in weekly professional development, continuously improving mentorship and instructional strategies.
- Implement, enforce, and follow school policies and procedures as outlined in the Vertus Way.
- Maintain accurate records of student progress, behavior, and attendance.
- Complete assigned tasks by designated due dates.
- Perform other duties as assigned in support of the school's mission.

#### **Qualifications**

- Commitment to Vertus values, culture, and goals
- Possess a passion for creating opportunities and developing leadership for urban youth; commitment to social justice
- Record of achievement evidenced by a demonstrated record of professional accomplishments
- Understanding of the strengths and challenges of students, their families and communities
- Demonstrated ability to inspire and motivate young men and to build effective relationships with students, families, and other supporters.
- Knowledge of community resources and the ability to engage these resources in service of students needs
- Demonstrated literacy and numeracy
- Proven ability to lead a team in high-stress situations and develop all team members to support the team



- Active learner with a demonstrated record of effective collaboration to solve intractable problems
- Demonstrated ability to accept and immediately implement critical feedback
- Ability to handle the intensity and flexibility required to work in a high-performing start-up school and remain calm, collegial, organized, and reliable under pressure
- Ambition to go above and beyond the requirements of the job to innovate in education and advance as an educator and a leader
- College and/or Military experience preferred

<b>Teacher</b>
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#### **Curriculum Development & Instruction**

- Develop and implement lesson plans and curriculum aligned with New York State Standards and school expectations.
- Teach up to six classes per day in a specific or various content areas, ensuring engaging and effective instruction.
- Prepare students for NYS Regents Exams, utilizing data-driven instruction and targeted interventions.
- Adapt instructional strategies to accommodate different learning styles and student needs.
- Incorporate Edgenuity and other digital platforms to supplement instruction and reinforce learning objectives.
- Maintain high academic expectations and rigor in all lessons.

#### **Classroom Management & Student Support**

- Adhere to the student discipline code of conduct and reinforce behavioral systems to maintain a structured learning environment.
- Establish and maintain a positive and respectful classroom culture aligned with the Vertus Way.
- Provide one-on-one and small group instruction to support struggling students and close learning gaps.
- Support students with accommodations, including SPED and ENL, ensuring equitable access to learning.
- Implement classroom procedures that promote student accountability, responsibility, and engagement.

#### **Collaboration & Communication**

- Work closely with Preceptors, Special Education Teachers, and Academic Intervention Specialists to support student learning.
- Communicate regularly with parents/guardians regarding student progress, attendance, and behavior.
- Participate in collaborative planning meetings and share best practices with colleagues.
- Attend and actively engage in weekly professional development to enhance instructional practices.
- Maintain accurate and up-to-date records of student performance, attendance, and discipline.

#### **Professional Responsibilities**

- Implement, enforce, and follow school policies and procedures as outlined in the Vertus Way.
- Monitor and assess student progress, adjusting instruction based on data and student needs.
- Develop and implement a communication plan to keep families informed of academic and behavioral progress.
- Maintain a safe and structured classroom environment conducive to learning.
- Complete assigned tasks by designated due dates.
- Perform other duties as assigned in support of the school's mission.

### **Qualifications**

- Commitment to Vertus: mission, values, blended learning program, culture and goals
- Keen understanding of the New York State Standards and other relevant learning standards
- Systems thinker with strong data and analytical skills, including presenting data in clear, user-friendly formats
- Demonstrated experience integrating digital resources into teaching and learning
- Ability to form strong relationships with students and families
- Collaborative working style, able to work as part of a tight-knit team
- Excellent interpersonal and communication skills
- Ambition to go above and beyond the requirements of the job to innovate in education
- Demonstrated success raising achievement of students
- Demonstrated record of professionalism
- Bachelor's Degree (required)
- Master's Degree (preferred)
- 1 year of experience (preferred)
- NYS Teaching Certification (or in process)

<h3><b>Behavior Intervention Specialist</b></h3>
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Behavior Intervention Specialists play a key role in mentoring, de-escalating conflicts, and ensuring students are accountable for their actions while reinforcing the Vertus Character Traits of Grit, Zest, Social Intelligence, Curiosity, Gratitude, Optimism, and being a Brother's Keeper.

### **Behavioral Support & Student Accountability**

- Maintain a consistent presence in hallways, common areas, and classrooms to ensure a structured school environment.
- Intervene in behavioral challenges, using restorative practices to guide students toward accountability.
- De-escalate situations professionally and reinforce school-wide behavioral expectations.
- Supervise and support students in reflection spaces, ensuring productive use of time.
- Assist in morning arrival, hallway supervision, lunch monitoring, and dismissal to maintain an orderly flow of students.

### **Restorative Practices & Conflict Resolution**

- Lead restorative conversations and mediations to help students take ownership of their actions.
- Implement proactive intervention strategies to prevent escalations before they occur.
- Work closely with Preceptors, Teachers, and School Leaders to reinforce school expectations

and support student development.

- Ensure that students receive appropriate behavioral interventions and follow through on corrective actions.

#### **Student Mentorship & Advocacy**

- Build strong relationships with students to foster personal growth and trust.
- Act as a mentor, guiding students through challenges and holding them accountable for their decisions.
- Encourage students to set behavioral and personal goals, tracking their progress.
- Serve as a consistent adult presence, reinforcing self-discipline, responsibility, and leadership.

#### **Crisis Management & School Safety**

- Respond promptly to behavioral incidents, ensuring safety for all students and staff.
- Assist in searching for prohibited items, monitoring student behavior, and addressing misconduct.
- Support school security measures by patrolling areas prone to loitering or unauthorized visitors.
- Collaborate with the school's safety team to maintain a secure and structured learning environment.

#### **Collaboration & Professional Responsibilities**

- Work closely with Teachers, Preceptors, School Leaders, and Support Staff to create a unified approach to student behavior.
- Participate in weekly professional development, continuously improving behavioral intervention strategies.
- Communicate with families and guardians to provide updates on student behavior and interventions.
- Document behavioral incidents, interventions, and resolutions in a clear and professional manner.
- Actively contribute to school-wide initiatives that promote a positive and disciplined school culture.
- Perform additional responsibilities as assigned to support the mission and goals of Vertus Middle.

#### **Qualifications**

- Commitment to Vertus values, culture and goals
- Possess a passion for creating opportunities and developing leadership for urban youth; commitment to social justice
- A clear track record of professionalism
- Experience working with adolescent males
- Collaborative working style, able to work as part of a tight-knit team
- Ability to understand the strengths and challenges of students, their families, and communities
- Demonstrated ability to inspire and motivate young men and to build effective relationships with students, families, and other supporters.
- Knowledge of community resources and the ability to engage these resources in service of

students' needs

- Active learner with a demonstrated record of effective collaboration to solve intractable problems
- Demonstrated ability to accept and immediately implement critical feedback
- Ability to handle the intensity and flexibility required to work in a high-performing setting and remain calm, collegial, organized, and reliable under pressure
- Systems mindset with strong analytical skills
- Bachelors degree(preferred)

### **Academic Intervention Specialist**

Academic Intervention Specialists are passionate about providing and developing the resources for all our students to succeed, including both general and special education students. Vertus staff members work with students in traditional classroom settings and in “learning labs” where students engage in online learning as part of the unique blended learning program that Vertus offers. Staff will monitor and ensure that students attend school, progress, achieve academic success, and develop as men of character. Building relationships with students, parents, and fellow staff members is crucial to success. Our staff provides academic support and social and emotional support to accomplish the Vertus Mission of preparing leaders of character.

#### **Key Responsibilities**

Facilitate Student Learning:

- In a learning lab of approximately 16-40 students, ensuring that students are actively engaged with their computer-supported instruction (OR)
- In a traditional classroom setting (OR)
- In small group pullouts and tutoring sessions
- Create a safe learning environment
- Implement and enforce Vertus policies and procedures
- Teach classes in content area or electives as assigned
- Develop and update curriculum to meet the needs of students and prepare them for NYS Regents exams
- Work closely and in tandem with all staff members in order to demonstrate positive student growth and ensure educational outcomes
- Develop and lead small group and individual instruction
- Implement systems and processes for monitoring student progress
- Assess student learning daily and provide reports to Preceptors and others regarding student successes and challenges
- Communicate regularly with the families of students
- Integrate character education and school values into every aspect of instruction
- Contribute to the professional community and embody school culture

#### **Qualifications:**

- Commitment to Vertus: mission, values, blended learning program, culture, and goals
- Proven track record of accepting feedback and being coachable
- Systems thinker with strong data and analytical skills, including presenting data in clear, user-

friendly formats

- Ability to form strong relationships with students and families
- Collaborative working style, able to work as part of a tight-knit team
- Excellent interpersonal and communication skills
- Ambition to go above and beyond the requirements of the job to innovate in education
- Demonstrated success in raising the achievement of students
- Demonstrated record of professionalism
- Proven expertise in content area (required)
- Bachelor's Degree (preferred)
- Teacher Certification (preferred)
- Experience working with teenage youth

### Attachment 11: Pre-Opening Plan

Timeframe	Task	Person(s) Responsible
Upon Approval to March 2026	Seat the Board of Trustees	Board
	Recruit additional Board members	Board
	Adopt by-laws and code of ethics	Board
	Establish meeting schedule and location	Board
	Establish measurable planning year goals	Board
	Apply for CSP Grant	CEO
	Hire and onboard planning year staff (including Principal, Assistant Principal Student Recruiter, etc.) and establish measurable planning year goals	CEO
	Create community outreach plan	CEO
April to June 2026	Obtain 501(c)3 status	CEO and DeJoy
	Establish chart of accounts and accounting systems	CEO and Accountant
	Adopt Financial Policies and Procedures	Board, CEO, Accountant
	Negotiate facility contract	Board and CEO
	Negotiate renovation contract	Board and CEO
	Formalize partnerships with potential partners, including social services	CEO and Principal
	Conduct ongoing community outreach	CEO, Principal, Assistant Principal, and Student Recruiter
July 2026 to March 2027	Begin recruiting students	Student Recruiter
	Coordinate renovations	CEO and Assistant Principal
	Order and install Learning Lab infrastructure	CEO, IT/Tech
	Secure student records	CEO, Student Recruiter, IT/Tech
	Secure building permits	Board and CEO
	Develop policies, including code of conduct, computer usage, dress code, personnel	CEO, Principal, Assistant Principal
	Develop student and staff handbooks	CEO, Principal, Assistant Principal
	Develop MOUs with partners, as needed	CEO and Principal
	Adopt policies	Board
	Extend contracts with vendors used at Vertus Charter School, e.g., food services, office equipment, phone and Internet, IT support	CEO, Director of Curriculum & Assessment, Principal, Assistant Principal

	Recruit high quality instructional staff; begin hiring processes	CEO and Hiring Team
	Identify and purchase all needed curricula and instructional materials, technology	Principal, Director of Curriculum & Assessment, Assistant Principal
April to June 2027	Get Certificate of Occupancy	Facilities & Athletic Director
	Hold lottery	CEO, Principal
	Complete all hiring	CEO, Principal, Assistant Principal
	Finalize handbooks	CEO
	Create student record system	IT/Tech
	Conduct home visits	Student Recruiter and Preceptors
	Plan staff pre-service (summer) training	CEO, Dir of Curriculum & Assessment, Principal, Assistant Principal
	Incorporate partners into staff training and planning as appropriate	CEO, Dir of Curriculum & Assessment, Principal, Assistant Principal
	Install equipment, e.g., food services, office, etc.	Facilities & Athletic Director
	Install and test technology systems and educational software	IT/Technology
	Develop detailed assessment calendar aligned to state testing requirements and curricular resources	CEO, Dir of Curriculum & Assessment, Principal
July and August 2027	Hold staff training	CEO, Dir of Curriculum & Assessment, Principal, and Assistant Principal
	Plan and hold the first Family Meeting/Orientation	CEO, Dir of Curriculum & Assessment, Principal, and Assistant Principal
	Set up all classrooms and Learning Labs	Facilities & Athletic Director
	Prepare for students' arrival	CEO, Dir of Curriculum & Assessment, Principal, and Assistant Principal

## **Attachment 12: Dissolution Plan**

In the event of closure, the Vertus Middle Board will direct the CEO and the contracted accountant from DeJoy to coordinate the dissolution process. The school will establish a Dissolution Committee that will include the Board Chair and Treasurer, CEO, contracted accountant, and legal counsel. The purpose will be to develop a dissolution plan and timeline for approval by the Board, which will be shared with SED and modified as required. The dissolution plan will address 1) notification and student transition support for families, and 2) distribution of assets and related financial matters. The CEO will post the dissolution plan on the school's website and notify parents in writing of the school closure date and the process for transferring to another school. At least two meetings with parents will be scheduled and publicized to go over the information contained in the letter. Vertus Middle staff will identify transfer options and admissions processes and requirements to share with parents and schedule individual meetings with each student's family to go over their options and assist with placement. The school will notify the district of its closure plan and to the extent possible the transfer plans of its families. The Principal will deliver a current student list to the district and the CEO and Principal will schedule a meeting with the district to discuss transfer options in district schools and programs. The school will work with the district to facilitate the transfer of all appropriate student records.

Vertus Middle will maintain \$100,000 in a dedicated escrow account for the purpose of dissolution (this is accounted for within the budget template). These funds will be used to pay for legal and audit expenses associated with the dissolution. The CEO, Principal, and Board Treasurer will conduct a meeting with its accountants and auditors to begin a process of identifying assets required for transfer. The Principal will create an up-to-date inventory of the assets of the school and then attend to the payment of all the school's outstanding debts. Once all debts are satisfied, the Board will adopt a plan for distribution of the remaining assets with priority to transfer the assets to another charter school within Rochester. Vertus Middle will follow any additional procedures required by NYSED to ensure an orderly closure and dissolution process, including compliance with the applicable requirements of Education Law §2851(2)(t) and any Closing Procedures specified by SED.



## ATTACHMENT 13: PLAN TO ADDRESS ENGLISH LANGUAGE LEARNERS

This plan was created to align with [NYSED's Blueprint for English Language Learner / Multilingual Learner Success](#).

### Identification/Programs

**ADMINISTRATION AND OVERSIGHT:** Vertus Middle will employ a skilled, collaborative team to deliver high-impact support for ELLs, fully aligned with the *NYS Blueprint for ELL/MLL Success*. The Specialized Services Coordinator (SSC) reports to the Principal and oversees all ELL programming and Part 154 compliance, managing NYSITELL and NYSESLAT testing, maintaining ELL records, coordinating services, and serving as the primary family contact. A certified ENL Teacher will deliver direct instruction through standalone ENL classes and push-in or pull-out support, depending on students' proficiency. Bilingual Preceptors and Teachers—especially Spanish-speaking staff—will help provide content-based supports and communicate with families in their home language (*Blueprint Principles #4 and #5*). All general education Teachers will be trained as teachers of ELLs and work closely with the ENL Teacher to differentiate lessons, embed language goals, and use scaffolds. Teachers and Preceptors will meet regularly with the SSC to review student data, monitor NYSESLAT growth, and adjust supports as needed. All staff will have secure access to ELL profiles, accommodations, and proficiency levels, which will inform lesson planning and be reviewed in weekly meetings. Academic Intervention staff and Preceptors will provide targeted language and literacy support in Learning Labs, reinforcing vocabulary and content understanding.

**IDENTIFICATION:** Vertus will administer a Home Language Survey (HLS) to all incoming students to determine whether English is the student's primary language. If a student indicates a home language other than English, the SSC will contact the student's previous school to confirm any existing ELL status and obtain records of the student's current English proficiency level. All students identified through the HLS as having a home language other than English will be assessed using the NYSITELL (New York State Identification Test for English Language Learners) or the revised Language Assessment Battery (LAB-R) to determine eligibility for ENL services and appropriate placement. We also verify previous ELL status with prior schools and NYSESLAT records (*Blueprint Principle #8*).

**OVERSEEING IDENTIFICATION:** The SSC oversees the entire ELL identification and placement process, ensuring compliance with NYSED Part 154 and consistent application of procedures that align with the Blueprint's call for clear vision and accountability (*Blueprint Principle #2*).

**PROGRAMMING:** Vertus Middle will provide a dedicated ENL program, which includes both stand-alone ENL classes and push-in/pull-out support in core subjects, depending on each student's proficiency level. This means students receive explicit English language instruction while also learning grade-level content with targeted scaffolds. While Vertus does not operate a Transitional Bilingual or Dual Language program, we use bilingual supports strategically where possible. Many ELLs are placed on teams with Teachers or Preceptors who speak Spanish, and the Learning Lab and Edgenuity platform provide bilingual content in Spanish (and other languages). This helps students access rigorous coursework in their home language while building English proficiency. (*Blueprint Principles #1 and #4*)

**ELL AND SWD:** Vertus Middle will fully comply with the IDEA, including Child Find (34 C.F.R. § 300.125), to ensure that English Language Learners (ELLs) who may also have disabilities are accurately identified and supported, in line with *Blueprint Principles #1 and #8*. The Specialized Services Coordinator (SSC) will oversee a comprehensive process that includes a thorough intake combining the Home Language Survey and NYSITELL results, so language differences are not mistaken for disabilities (*Blueprint Principle #1*). The SSC will coordinate closely with feeder schools to obtain records verifying ELL status, IEPs, or services, and ensure staff receive training to recognize

signs of possible disabilities while understanding typical language development (*Blueprint Principle #6*). Multiple data points—state tests, NYSESLAT growth, i-Ready, formative checks, and teacher input—will be reviewed to flag students needing more support (*Blueprint Principle #8*). For ELLs without an IEP but showing signs of a disability, Vertus will follow its RtI framework. If a student does not progress after Tier 3 interventions, the SSC and RtI team may refer the student to the Committee on Special Education (CSE). The SSC will work with the CSE to ensure evaluations are conducted in the student’s home language when possible and that final services align with both IEP and ENL needs (*Blueprint Principle #4*). Families are partners throughout, meeting with staff to ensure each student’s needs are fully understood and addressed with coordinated supports.

### Quality of Instruction

**MEETING AND EXCEEDING STANDARDS:** Vertus Middle will use a case management team approach to coordinate, implement, monitor, and evaluate services for ELLs alongside students with disabilities, aligned with *Blueprint Principles #1, #6, and #8*. The SSC will lead this work, overseeing special education and ENL programs, managing records, ensuring compliance, coordinating services, training staff, and serving as the main family contact. Each Learning Lab will include at least one certified special education teacher when possible—ideally the Lead Teacher—supported by staff trained in ENL strategies. This structure enables delivery of Integrated Co-Teaching (ICT) and ENL supports within a flexible, inclusive setting. The Learning Lab’s rotation of online coursework, small-group work, and project-based tasks makes it easy to provide direct and indirect language supports alongside general instruction (*Blueprint Principle #1*). Because every student follows a personalized path, there is no stigma in receiving individualized support for language development or IEP goals. Preceptors join Learning Teams in the Lab daily to provide academic and social-emotional support. Through the LMS, administrators and leaders track performance data by Learning Team, House, and ELL status to identify trends, guide training, and hold teams accountable (*Blueprint Principle #8*). The SSC monitors progress to ensure services are effective and compliant, while staff also track over-age and under-credited students to ensure interventions keep them on track.

**INSTRUCTIONAL STRATEGIES, METHODS, AND MATERIALS:** Vertus Middle will deliver instruction through a **blended model** combining teacher-led lessons, small groups, coaching, and real-world application to help ELLs reach English proficiency and grade-level mastery (*Blueprint Principles #1, #3, and #8*). Instruction will be highly differentiated, guided by continuous diagnostics like i-Ready, NYSESLAT, and formative checks, so teachers can adjust scaffolds, pacing, and grouping in real time. Teachers will use modeling, think-alouds, guided practice, and frequent checks for understanding to build language and content mastery (*Blueprint Principle #3*). An ICT model will pair general educators with the ENL Teacher and Intervention staff to deliver direct language supports such as guided notes, visuals, translation tools, and strategic home language use (*Blueprint Principle #7*). Amplify ELA provides explicit EL supports, complex texts, and culturally relevant content, while Edgenuity and MyPath™ add adaptive, bilingual modules with features like text-to-speech and glossary tools aligned with UDL (*Blueprint Principles #1 and #4*). The Learning Lab offers targeted small group help and supplemental literacy support, like Wilson Reading, as needed. Instruction will connect students’ identities and lived experiences to lessons, using texts by authors of color and themes of identity and justice to deepen engagement (*Blueprint Principle #2*). Ongoing coaching and *Teach Like a Champion 3.0* help teachers build rigorous, supportive classrooms that promote student agency and persistence.

**DIFFERENTIATION:** Vertus Middle will embed differentiated instruction into daily practice so all students—especially ELLs—can access rigorous, grade-level content (*Blueprint Principles #1 and #3*). Teachers will use scaffolded lessons, flexible grouping, guided notes, and re-teaching based on real-time data from i-Ready, NYSESLAT, and classroom checks (*Blueprint Principle #8*). Supports will adjust to each ELL’s English level and background knowledge, including visuals, vocabulary previews, and home language scaffolds. The ICT model ensures ELLs learn alongside peers with direct push-in help. High-quality supplemental tools—Amplify ELA,

Edgenuity, Achieve3000, Accelerated Reader 360, Delta Math, eMath Instruction, and GeoGebra—reinforce reading and math at multiple levels. Students needing extra help receive small-group or 1:1 support from Academic Intervention staff. All materials are chosen for alignment with standards, cultural relevance, and proven effectiveness for multilingual learners, ensuring ELLs get the tailored instruction and supports needed for growth and success.

**LITERACY:** Where feasible, Spanish-speaking Teachers and Preceptors help bridge students' home language with English. Edgenuity's translation features and strategic use of home language reinforce students' background knowledge to deepen comprehension (*Blueprint Principle #7*).

**HIGH-QUALITY, CULTURALLY APPROPRIATE AND RESEARCH-BASED MATERIALS:** Vertus selects high-quality, culturally relevant, bias-free curriculum materials proven effective for diverse learners (*Blueprint Principle #1*). Core programs like Amplify ELA and Edgenuity provide explicit literacy instruction, blended content, embedded ELL supports, UDL principles, clear objectives, and formative assessments to track language development. The selection process prioritizes comprehensive teacher guides, built-in assessments, and robust scaffolds to help teachers deliver rigorous, accessible, and language-rich lessons that promote discussion and inquiry (*Blueprint Principles #1 and #3*). All materials must align with standards, adapt for ELLs and SWDs, and include strong structures for differentiation and home language supports.

**RIGOROUS, RESEARCH-BASED INSTRUCTION ACROSS LANGUAGE DOMAINS:** Vertus's ELL curriculum intentionally builds reading, writing, listening, and speaking skills daily (*Blueprint Principle #3*). Amplify ELA embeds explicit vocabulary, comprehension strategies, repeated exposure to complex texts, and daily writing tasks to deepen students' literacy. Edgenuity supplements core instruction with multimedia-rich lessons that model academic language and metacognitive strategies. The Learning Lab does not replace teacher-led lessons — it extends and reinforces them through adaptive practice, personalized pacing, and multiple means of expression and representation, giving ELLs multiple pathways to master rigorous content. All digital resources are reviewed for standard alignment, clear objectives, built-in formative assessments, and accessibility for students with diverse needs.

### Support

**TRANSLATION:** (*Blueprint Principle #5*) Vertus Middle will ensure all critical communications—including newsletters, report cards, handbooks, and family agreements—are translated into Spanish and other needed languages by bilingual staff or interpreters. Each student's Preceptor will be the main contact for families and will communicate regularly in their home language. Teachers and Behavioral Intervention Staff will connect with families as needed about academics, attendance, or behavior. Vertus will host three Family Nights each year (with interpreters available) and maintain an online portal and Edgenuity Parent portal for real-time access to grades and assignments in families' preferred language. Automated calls and Preceptor follow-ups will address absences. When needed, staff will make in-home visits for added support. A quarterly translated newsletter and the annual Induction Ceremony will help families stay informed and engaged.

**INTERVENTION AND SUPPORT SERVICES:** Preceptors, Teachers, and the ENL specialist deliver layered interventions in English and the home language, using Edgenuity's glossary tool to build academic vocabulary, the Wilson Reading System for targeted literacy intervention aligned with the Science of Reading, and Amplify ELA to strengthen explicit vocabulary instruction, reading comprehension, and text-based writing practice (*Blueprint Principles #1 and #4*). To extend classroom learning, Vertus's blended Learning Lab combines Amplify's digital components, Edgenuity's adaptive modules, and teacher-guided practice to provide personalized, mastery-based progression. Digital resources are used strategically — not as a substitute for teacher-led lessons but as an additional layer to help ELLs and all students close gaps, accelerate when ready, and engage with content at

their level.

**SOCIAL-EMOTIONAL NEEDS:** Vertus Middle’s strong, relational culture is central to meeting the social-emotional needs of all students, including ELLs. Every student will belong to a small Learning Team, supported daily by a dedicated Preceptor who knows them well and champions their growth. Students participate in advisory periods twice daily, including Seminar, which focuses on character development, workplace readiness, study skills, and SEL strategies — reinforcing resilience, goal-setting, and leadership skills. Behavioral supports are restorative and relational. Vertus Middle’s tiered discipline model keeps students connected to learning and emphasizes repairing harm, reflection, and reintegration rather than removal from class. For students with repeated but non-violent behavioral challenges, the Pathways to Success program serves as a formal Alternative to Suspension (ATS), combining coaching, reflection assignments, and re-entry plans to build better strategies and keep students in school.

**PARENT ENGAGEMENT:** We host bilingual family meetings and provide ongoing updates in families’ home languages. Teachers and Preceptors maintain close relationships with families, promoting active partnership (*Blueprint Principle #5*). Twice a year, families will receive detailed Progress Reports with NYSESLAT results (when applicable), state test performance, and classroom progress data. The Coordinator will ensure that all assessments are administered properly, results are shared with families in their home language, and supports are adjusted to help each ELL stay on track for grade-level success.

#### **Professional Development/Teacher Certification**

**PD TO SUPPORT ENGLISH LEARNERS:** At Vertus Middle, professional development (PD) is built into daily practice to ensure every teacher is prepared to serve ELLs and all subgroups effectively (*Blueprint Principle #6*). Teachers receive frequent coaching and feedback from the Assistant Principal and targeted training in research-based strategies from *Teach Like a Champion 3.0*—such as “Culture of Error,” “Positive Framing,” and “Joy Factor”—to build rigorous, supportive classrooms that foster student agency and growth mindsets. Before school begins, all staff complete intensive summer training on Vertus’s core design. The SSC trains teachers to use IEPs and adapt lessons for students with disabilities and ELLs. PD continues year-round through monthly whole-staff sessions and quarterly Data Days to analyze performance and refine instruction. By embedding professional learning in daily practice and tying it to student data, Vertus ensures every teacher grows the skills to deliver rigorous, inclusive instruction, fulfilling the Blueprint vision that all teachers are teachers of ELLs.

**ATTRACT AND RETAIN TEACHERS:** Vertus Middle recognizes that recruiting and retaining strong ENL/ESOL teachers and bilingual staff is key to meeting ELL needs (*Blueprint Principle #6*). The Assistant Principal and SLT will lead a proactive strategy to recruit certified ENL teachers, bilingual educators, and culturally competent Preceptors. Job postings will prioritize ESOL certification for ELA and support roles where possible. Vertus will recruit through regional bilingual networks, graduate programs, and professional associations focused on multilingual education. New ENL and bilingual staff will be supported through a proven mentorship system, job-embedded coaching, and targeted summer training.

**COLLABORATION:** (*Blueprint Principle #6*) Vertus will hire staff committed to serving at-risk young men in a rigorous, innovative environment and willing to collaborate to meet ELL needs. Leaders will build clear structures—drawing on what works at Vertus High—for teachers, Preceptors, and support staff to problem-solve together and fulfill their role as teachers of ELLs (*Blueprint Principle #1*). Teachers will meet every Wednesday after school to align instruction, review data, and strengthen lessons for all subgroups, including ELLs. Special Education and ENL Teachers will join these meetings, collaborating with general educators, Preceptors, and Behavioral Intervention Staff to ensure multilingual learners with disabilities receive

coordinated supports. Teams will use shared planning tools and real-time Edgenuity and Amplify data to monitor ELL progress on language and content goals. The SSC will help Learning Teams disaggregate data by proficiency, monitor growth in reading, writing, listening, and speaking, and adjust interventions as needed (*Blueprint Principle #8*).

**SYSTEMS AND STRUCTURES:** (*Blueprint Principle #6*) Planning time is built into the daily schedule so that Teachers can meet during prep periods while students are in electives or specials. This ensures that collaboration is not limited to after-school meetings but is an ongoing, daily practice that supports timely adjustments for ELLs. The school's integrated co-teaching model further supports this alignment. Special Education Teachers, ENL Teachers, and content-area Teachers work side by side in core classes to deliver scaffolded, language-rich instruction. This model fosters daily communication, shared lesson planning, and joint problem-solving to meet each ELL's academic and language goals. Key ELL status, language proficiency data, and accommodation needs are securely accessible to all relevant staff through digital systems and are reviewed in weekly Learning Team meetings. Teachers use this shared information to adjust pacing, scaffolds, and materials in real time.

#### **Data/Assessment**

**ASSESSMENTS:** Vertus Middle will use multiple ongoing assessments to monitor ELLs' academic and language development and ensure they receive timely, targeted support (*Blueprint Principle #8*). The SSC, reporting to the Principal, will oversee all ELL assessments to ensure compliance with NYS Part 154, including administering the NYSESLAT annually to measure progress in reading, writing, listening, and speaking. Teachers will also use regular formative and benchmark assessments—including i-Ready, unit tests, and developmental reading checks—to monitor progress toward grade-level mastery. Edgenuity and Amplify include built-in assessments that provide immediate feedback on comprehension, vocabulary, and skills, helping Teachers and the ENL specialist identify gaps and adjust instruction in real time.

**GRADUATION:** Vertus Middle is designed to ensure a smooth, intentional pathway to high school for all students, including ELLs. Because it feeds directly into Vertus High, most students will transition seamlessly within the same network and continue to benefit from strong relationships, familiar supports, and proven practices that help multilingual learners thrive. The pillars that support ELLs in middle school — Learning Teams, Preceptors, the Learning Lab, data-driven instruction, and the ENL program — will continue at Vertus High. This consistency helps students sustain progress, maintain trusted relationships, and build on skills and confidence. As 8th grade approaches, the SSC and Preceptors will work with families to share NYSESLAT results, review progress, and plan supports for high school. This intentional handoff ensures students stay on track to exit ENL services when ready and meet or exceed State graduation requirements.

**USING DATA:** (*Blueprint Principle #8*) ELL students' progress is continuously tracked using multiple data points. Teachers, Preceptors, the ENL Teacher, and the SSC review this data to adjust instruction, add scaffolds, or provide targeted interventions like small-group sessions or extra Learning Lab practice. NYSESLAT results and program placement decisions are clearly communicated in the family's home language, and the Coordinator ensures all required documentation is updated and maintained. Finally, Vertus Middle uses aggregated ELL data to evaluate the effectiveness of its overall program and to make needed improvements in curriculum, staffing, or training — so that every multilingual learner stays on track to achieve English proficiency and meet grade-level standards.

# New York State Education Department

Request for Proposals to Establish Charter Schools Authorized by the Board of Regents

## **Budget and Cash Flow Templates for the 2025 New School Application**

### **General Instructions and Notes for New Application Budgets and Cash Flows Templates**

1. - Complete ALL SIX tabs in **BLUE**
2. - Enter information into the **GRAY** cells
3. - Cells labeled in **ORANGE** contained guidance pertaining to that tab
4. - Cells containing **RED** triangles in the upper right corner in columns B thru G contain guidance on that particular line item
5. - Funding by School District information for all NYS School districts is located on the State Aid website at [State Aid--https://stateaid.nysed.gov/ch](https://stateaid.nysed.gov/ch); Refer to this website for per-pupil tuition funding for all school districts. Rows may be inserted in the worksheet to accommodate additional districts if necessary.
6. - Assumptions column should be completed for all revenue and expense items unless the item is self-explanatory. Where applicable, please reference the page number or section in the application narrative that indicate the assumption being made. For instance, student enrollment would reference the applicable page number in Section I, C of the application narrative.

[New York State Education Department](#)  
[Request for Proposals to Establish Charter Schools](#)  
[Authorized by the Board of Regents](#)

New Application Budget(s) & Cash Flow(s) Templates

	Vertus Charter Middle School
Contact Name:	Julie Locey
Contact Email:	jlocey@vertusschool.org
Contact Phone:	585-747-8911
District of Location	Rochester City School District
	Examples
Pre-Opening Period	July 1, 2026 to June 30, 2027
Operational Year ONE	July 1, 2027 to June 30, 2028

Vertus Charter Middle School  
PROJECTED BUDGET / OPERATING PLAN FOR PRE-OPENING PERIOD  
July 1, 2026 to June 30, 2027

Assumptions

Please Note: The student enrollment data is entered below in the Enrollment Section beginning in row 148. This will populate the data in row 10.

DESCRIPTION OF ASSUMPTIONS - Please reference section/page number in application if applicable. For example, student enrollment would reference the page in the application that states enrollment targets.

Total Revenue	550,000
Total Expenses	452,400
Net Income	97,600
Actual Student Enrollment	-
Total Paid Student Enrollment	-

START-UP  
PERIOD

REVENUE

REVENUES FROM STATE SOURCES

Per Pupil Revenue

CY Per Pupil Rate

District of Location

School District 2 (Enter Name)  
School District 3 (Enter Name)  
School District 4 (Enter Name)  
School District 5 (Enter Name)

-	
-	-
-	-
-	-
-	-
-	-

Special Education Revenue

Grants

Stimulus

Other

Other

-
-
-

TOTAL REVENUE FROM STATE SOURCES

-
---

REVENUE FROM FEDERAL FUNDING

IDEA Special Needs

Title I

Title Funding - Other

School Food Service (Free Lunch)

Grants

Charter School Program (CSP) Planning & Implementation

Other

Other

-
-

300,000
150,000
-

TOTAL REVENUE FROM FEDERAL SOURCES

450,000
---------

LOCAL and OTHER REVENUE

Contributions and Donations, Fundraising

Erate Reimbursement

Interest Income, Earnings on Investments,

NYC-DYCD (Department of Youth and Community Developmt.)

Food Service (Income from meals)

Text Book

OTHER

100,000
-
-
-
-
-
-

TOTAL REVENUE FROM LOCAL and OTHER SOURCES

100,000
---------

TOTAL REVENUE

550,000
---------

EXPENSES

ADMINISTRATIVE STAFF PERSONNEL COSTS

No. of Positions

Executive Management

Instructional Management

Deans, Directors & Coordinators

CFO / Director of Finance

Operation / Business Manager

Administrative Staff

0.30	59,500
1.70	136,100
-	-
-	-
1.40	87,500
0.20	9,000
3.60	292,100

List exact titles included in the position category, if different from description, and staff FTE"s ( Full time eqiullivalent)

Chief Educational Officer .30 FTE  
Principal .20 FTE, Chief Academic Officer .50 FTE, Assistant Principal 1 FTE  
IT Manager .50 FTE, Director of Facilities .40 FTE, Student Recruiter .50 FTE  
Receptionist .20 FTE

TOTAL ADMINISTRATIVE STAFF

INSTRUCTIONAL PERSONNEL COSTS

Teachers - Regular

Teachers - SPED

Substitute Teachers

Teaching Assistants

Specialty Teachers

Aides

Therapists & Counselors

Other

-	-
-	-
-	-
-	-
-	-
-	-
-	-
-	-

TOTAL INSTRUCTIONAL

-	-
---	---

NON-INSTRUCTIONAL PERSONNEL COSTS

Nurse

Librarian

Custodian

Security

Other

-	-
-	-
-	-
-	-
-	-

TOTAL NON-INSTRUCTIONAL

-	-
---	---

SUBTOTAL PERSONNEL SERVICE COSTS

3.60	292,100
------	---------

PAYROLL TAXES AND BENEFITS

Payroll Taxes

Fringe / Employee Benefits

Retirement / Pension

25,100
20,000
4,300

NYSUI, Social Security, Medicare, NYS DBL and PFL  
Medical, Dental, Vision Insurances, Workers Comp,

TOTAL PAYROLL TAXES AND BENEFITS

49,400
--------

TOTAL PERSONNEL SERVICE COSTS

3.60	341,500
------	---------

CONTRACTED SERVICES

Accounting / Audit

Legal

Management Company Fee

Nurse Services

25,000
5,000
-
-

Accounting, Audit, Tax Services  
Legal Services



Food Service / School Lunch	-	
Payroll Services	1,900	Payroll and HR Services
Special Ed Services	-	
Titllement Services (i.e. Title I)	10,000	Grant Writing
Other Purchased / Professional / Consulting	17,000	Charter School Consulting and Outside Services, E-Rate Services
<b>TOTAL CONTRACTED SERVICES</b>	58,900	

<b>SCHOOL OPERATIONS</b>		
Board Expenses	-	
Classroom / Teaching Supplies & Materials	-	
Special Ed Supplies & Materials	-	
Textbooks / Workbooks	-	
Supplies & Materials other	-	
Equipment / Furniture	-	
Telephone	1,000	Mobile Phones
Technology	5,000	Technology Supplies
Student Testing & Assessment	-	
Field Trips	-	
Transportation (student)	-	
Student Services - other	-	
Office Expense	-	
Staff Development	5,000	Staff Development/Training, Conferences
Staff Recruitment	-	
Student Recruitment / Marketing	5,000	Student Recruitment
School Meals / Lunch	-	
Travel (Staff)	-	
Fundraising	-	
Other	-	
<b>TOTAL SCHOOL OPERATIONS</b>	16,000	

<b>FACILITY OPERATION &amp; MAINTENANCE</b>		
Insurance	4,000	General Insurance
Janitorial	-	
Building and Land Rent / Lease	-	
Repairs & Maintenance	10,000	General Repairs and Facility Expenses
Equipment / Furniture	-	
Security	-	
Utilities	-	
<b>TOTAL FACILITY OPERATION &amp; MAINTENANCE</b>	14,000	

<b>DEPRECIATION &amp; AMORTIZATION</b>	22,000	Depreciation
<b>DISSOLUTION ESCROW &amp; RESERVES / CONTIGENCY</b>	-	N/A for pre opening year

<b>TOTAL EXPENSES</b>	452,400
-----------------------	---------

<b>NET INCOME</b>	97,600
-------------------	--------

**ENROLLMENT - \*School Districts Are Linked To Above Entries\***

District of Location	-
School District 2 (Enter Name)	-
School District 3 (Enter Name)	-
School District 4 (Enter Name)	-
School District 5 (Enter Name)	-
<b>TOTAL ENROLLMENT</b>	-

<b>REVENUE PER PUPIL</b>	-
--------------------------	---

<b>EXPENSES PER PUPIL</b>	-
---------------------------	---



[illegible]



Vertus Charter Middle School PROJECTED BUDGET / OPERATING PLAN FOR YEAR ONE							<b>Assumptions</b> DESCRIPTION OF ASSUMPTIONS - Please reference section/page number in application <i>if applicable</i> . For example, student enrollment would reference the page in the application that states enrollment targets.
July 1, 2027 to June 30, 2028							
Please Note: The student enrollment data is entered below in the Enrollment Section beginning in row 147. This will populate the data in row 9.							
Total Revenue	1,665,700	607,700	-	22,600	62,500	2,358,500	
Total Expenses	1,289,080	454,410	-	16,670	301,100	2,061,260	
Net Income	376,620	153,290	-	5,930	(238,600)	297,240	
Actual Student Enrollment	75	20				95	
Total Paid Student Enrollment	75	20				95	
		PROGRAM SERVICES			SUPPORT SERVICES		
		REGULAR EDUCATION	SPECIAL EDUCATION	OTHER	FUNDRAISING	MANAGEMENT & GENERAL	TOTAL
<b>REVENUE</b>							
<b>REVENUES FROM STATE SOURCES</b>							
Per Pupil Revenue		CY Per Pupil Rate					
District of Location		-	-	-	-	-	-
Rochester City School District		14,781	1,330,300	-	-	-	1,330,300
Surrounding School Districts Average		14,365	71,900	-	-	-	71,900
School District 4 (Enter Name)		-	-	-	-	-	-
School District 5 (Enter Name)		-	-	-	-	-	-
		1,402,200	-	-	-	-	1,402,200
Special Education Revenue		-	468,900	-	-	-	468,900
Grants							
Stimulus		-	-	-	-	-	-
Other		-	-	-	-	-	-
Other		-	-	-	-	-	-
TOTAL REVENUE FROM STATE SOURCES		1,402,200	468,900	-	-	-	1,871,100
<b>REVENUE FROM FEDERAL FUNDING</b>							
IDEA Special Needs		-	34,900	-	-	-	34,900
Title I		47,100	12,500	-	-	-	59,600
Title Funding - Other		9,700	2,600	-	-	-	12,300
School Food Service (Free Lunch)		-	-	-	-	-	-
Grants							
Charter School Program (CSP) Planning & Implementation		125,000	62,500	-	-	62,500	250,000
Other		-	-	-	-	-	-
Other		-	-	-	-	-	-
TOTAL REVENUE FROM FEDERAL SOURCES		181,800	112,500	-	-	62,500	356,800
<b>LOCAL and OTHER REVENUE</b>							
Contributions and Donations, Fundraising		67,800	22,600	-	22,600	-	113,000
Erate Reimbursement		13,900	3,700	-	-	-	17,600
Interest Income, Earnings on Investments,		-	-	-	-	-	-
NYC-DYCD (Department of Youth and Community Developmnt.)		-	-	-	-	-	-
Food Service (Income from meals)		-	-	-	-	-	-
Text Book		-	-	-	-	-	-
OTHER		-	-	-	-	-	-
TOTAL REVENUE FROM LOCAL and OTHER SOURCES		81,700	26,300	-	22,600	-	130,600
TOTAL REVENUE		1,665,700	607,700	-	22,600	62,500	2,358,500

<b>EXPENSES</b>							List exact titles included in the position category, if different from description, and staff FTE's ( Full time equillivalent)
<b>ADMINISTRATIVE STAFF PERSONNEL COSTS</b>							
Executive Management	No. of Positions						
Instructional Management	0.20	6,200	4,100	-	2,100	28,600	41,000
Deans, Directors & Coordinators	1.40	93,400	24,900	-	-	-	118,300
CFO / Director of Finance	2.20	79,000	36,200	-	-	-	115,200
Operation / Business Manager	-	-	-	-	-	-	-
Administrative Staff	0.70	34,600	9,200	-	-	-	43,800
TOTAL ADMINISTRATIVE STAFF	1.20	30,400	12,200	-	-	18,300	60,900
	5.70	243,600	86,600	-	2,100	46,900	379,200
<b>INSTRUCTIONAL PERSONNEL COSTS</b>							
Teachers - Regular	4.00	158,000	42,000	-	-	-	200,000
Teachers - SPED	1.00	-	50,000	-	-	-	50,000
Substitute Teachers	-	-	-	-	-	-	-
Teaching Assistants	2.00	71,100	18,900	-	-	-	90,000
Specialty Teachers	1.00	39,500	10,500	-	-	-	50,000
Aides	5.00	177,750	47,250	-	-	-	225,000
Therapists & Counselors	0.40	19,500	5,200	-	-	-	24,700
Other	-	-	-	-	-	-	-
TOTAL INSTRUCTIONAL	13.40	465,850	173,850	-	-	-	639,700
<b>NON-INSTRUCTIONAL PERSONNEL COSTS</b>							
Nurse	-	-	-	-	-	-	-
Librarian	-	-	-	-	-	-	-
Custodian	-	-	-	-	-	-	-
Security	0.20	9,300	2,500	-	-	-	11,800
Other	-	25,800	10,400	-	-	15,500	51,700
TOTAL NON-INSTRUCTIONAL	0.20	35,100	12,900	-	-	15,500	63,500
<b>SUBTOTAL PERSONNEL SERVICE COSTS</b>	19.30	744,550	273,350	-	2,100	62,400	1,082,400
<b>PAYROLL TAXES AND BENEFITS</b>							
Payroll Taxes		70,600	25,600		200	6,200	102,600
Fringe / Employee Benefits		74,000	26,900		300	6,500	107,700
Retirement / Pension		11,000	4,000		100	1,000	16,100
TOTAL PAYROLL TAXES AND BENEFITS		155,600	56,500	-	600	13,700	226,400
<b>TOTAL PERSONNEL SERVICE COSTS</b>	19.30	900,150	329,850	-	2,700	76,100	1,308,800
<b>CONTRACTED SERVICES</b>							
Accounting / Audit		-	-	-	-	61,800	61,800
Legal		-	-	-	-	5,200	5,200
Management Company Fee		-	-	-	-	-	-
Nurse Services		-	-	-	-	-	-
Food Service / School Lunch		-	-	-	-	-	-
Payroll Services		-	-	-	-	10,200	10,200
Special Ed Services		-	-	-	-	-	-
Titllement Services (i.e. Title I)		-	-	-	-	10,000	10,000
Other Purchased / Professional / Consulting		-	-	-	-	19,000	19,000
TOTAL CONTRACTED SERVICES		-	-	-	-	106,200	106,200
<b>SCHOOL OPERATIONS</b>							
Board Expenses		-	-	-	-	-	-
Classroom / Teaching Supplies & Materials		24,400	6,500	-	-	-	30,900
Special Ed Supplies & Materials		-	-	-	-	-	-
Textbooks / Workbooks		-	-	-	-	-	-
Supplies & Materials other		3,600	1,200	-	120	1,080	6,000
Equipment / Furniture		3,000	1,000	-	100	900	5,000
Telephone		12,600	4,200	-	500	3,800	21,100
Technology		86,400	27,800	-	2,400	21,200	137,800
Student Testing & Assessment		1,700	500	-	-	-	2,200
Field Trips		1,700	500	-	-	-	2,200
Transportation (student)		-	-	-	-	-	-
Student Services - other		33,700	9,000	-	-	-	42,700
Office Expense		15,300	5,100	-	510	4,590	25,500
Staff Development		21,800	7,300	-	800	6,600	36,500
Staff Recruitment		1,800	600	-	60	540	3,000
Student Recruitment / Marketing		12,000	4,000	-	400	3,600	20,000
School Meals / Lunch		-	-	-	-	-	-
Travel (Staff)		-	-	-	-	-	-
Fundraising		-	-	-	3,000	-	3,000
Other		620	210	-	30	190	1,050
TOTAL SCHOOL OPERATIONS		218,620	67,910	-	7,920	42,500	336,950
<b>FACILITY OPERATION &amp; MAINTENANCE</b>							
Insurance		8,600	2,900	-	300	2,600	14,400
Janitorial		27,100	9,100	-	1,000	8,200	45,400
Building and Land Rent / Lease		66,800	22,300	-	2,300	20,100	111,500
Repairs & Maintenance		27,100	9,100	-	1,000	8,200	45,400
Equipment / Furniture		-	-	-	-	-	-
Security		1,910	250	-	70	580	2,810
Utilities		12,400	4,200	-	500	3,700	20,800
TOTAL FACILITY OPERATION & MAINTENANCE		143,910	47,850	-	5,170	43,380	240,310

Title II and IV

63%

5%

1,451

12%

DEPRECIATION & AMORTIZATION	26,400	8,800	-	880	7,920	44,000	Depreciation
DISSOLUTION ESCROW & RESERVES / CONTIGENCY	-	-	-	-	25,000	25,000	Breaking out \$100K over 3 years
TOTAL EXPENSES	1,289,080	454,410	-	16,670	301,100	2,061,260	
NET INCOME	376,620	153,290	-	5,930	(238,600)	297,240	

ENROLLMENT - *School Districts Are Linked To Above Entries*	REGULAR EDUCATION	SPECIAL EDUCATION				
District of Location						-
Rochester City School District	70	20				90
Surrounding School Districts Average	5	-				5
School District 4 (Enter Name)						-
School District 5 (Enter Name)						-
TOTAL ENROLLMENT	75	20	-			95
REVENUE PER PUPIL	22,209	30,385	-			24,826
EXPENSES PER PUPIL	17,188	22,721	-			21,697





**Vertus Charter Middle School**  
**PROJECTED CASH FLOW FOR YEAR ONE OF OPERATIONS**  
**July 1, 2027 to June 30, 2028**

<b>Total Revenue</b>	290,200	206,500	233,700	20,247	503,050	-	383,420	5,867	311,850	-	311,850	91,817	2,358,500
<b>Total Expenses</b>	194,928	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	2,061,260
<b>Net Income</b>	95,272	36,833	64,033	(149,420)	333,383	(169,667)	213,753	(163,800)	142,183	(169,667)	142,183	(77,850)	297,240
<b>Cash Flow Adjustments</b>	3,667	(54,033)	3,667	3,667	3,667	(11,333)	3,667	3,667	3,667	(11,333)	3,667	3,667	(43,700)
<b>Beginning Cash Balance</b>	9,600	108,538	91,338	159,039	13,285	350,336	169,336	386,756	226,623	372,473	191,473	337,323	9,600
<b>Net Income</b>	108,538	91,338	159,039	13,285	350,336	169,336	386,756	226,623	372,473	191,473	337,323	263,140	263,140

	July	August	September	October	November	December	January	February	March	April	May	June	TOTAL
REVENUE	* Total Column (Column U) for all lines other than Cash Flow Adjustments should equal the Total Column (Column N) on tab '4.) Year Budget & Assumptions'.												
REVENUES FROM STATE SOURCES													
Per Pupil Revenue	CY Per Pupil Rate												
District of Location	-												-
Rochester City School District	221,717	-	221,717	-	221,717	-	221,717	-	221,717	-	221,717	-	1,330,300
Surrounding School Districts Average	11,983	-	11,983	-	11,983	-	11,983	-	11,983	-	11,983	-	71,900
School District 4 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
School District 5 (Enter Name)	-	-	-	-	-	-	-	-	-	-	-	-	-
	233,700	-	233,700	-	233,700	-	233,700	-	233,700	-	233,700	-	1,402,200
Special Education Revenue	-	-	-	-	234,450	-	78,150	-	78,150	-	78,150	-	468,900
Grants													
Stimulus	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM STATE SOURCES	233,700	-	233,700	-	468,150	-	311,850	-	311,850	-	311,850	-	1,871,100
REVENUE FROM FEDERAL FUNDING													
IDEA Special Needs	-	-	-	-	34,900	-	-	-	-	-	-	-	34,900
Title I	-	-	-	11,920	-	-	17,880	-	-	-	-	29,800	59,600
Title Funding - Other	-	-	-	2,460	-	-	3,690	-	-	-	-	6,150	12,300
School Food Service (Free Lunch)	-	-	-	-	-	-	-	-	-	-	-	-	-
Grants													
Charter School Program (CSP) Planning & Implementation	-	150,000	-	-	-	-	50,000	-	-	-	-	50,000	250,000
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM FEDERAL SOURCES	-	150,000	-	14,380	34,900	-	71,570	-	-	-	-	85,950	356,800
LOCAL and OTHER REVENUE													
Contributions and Donations, Fundraising	56,500	56,500	-	-	-	-	-	-	-	-	-	-	113,000
Erate Reimbursement	-	-	-	5,867	-	-	-	5,867	-	-	-	5,867	17,600
Interest Income, Earnings on Investments,	-	-	-	-	-	-	-	-	-	-	-	-	-
NYC-DYCD (Department of Youth and Community Developmt.)	-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service (Income from meals)	-	-	-	-	-	-	-	-	-	-	-	-	-
Text Book	-	-	-	-	-	-	-	-	-	-	-	-	-
OTHER	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL REVENUE FROM LOCAL and OTHER SOURCES	56,500	56,500	-	5,867	-	-	-	5,867	-	-	-	5,867	130,600
TOTAL REVENUE	290,200	206,500	233,700	20,247	503,050	-	383,420	5,867	311,850	-	311,850	91,817	2,358,500

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ADMINISTRATIVE STAFF PERSONNEL COSTS	No. of Positions
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[illegible]

## INSTRUCTIONAL PERSONNEL COSTS

[illegible]

## NON-INSTRUCTIONAL PERSONNEL COSTS

[illegible]

SUBTOTAL PERSONNEL SERVICE COSTS		19.30	90,200	90,200	90,200	90,200	90,200	90,200	90,200	90,200	90,200	90,200	90,200	1,082,400
PAYROLL TAXES AND BENEFITS														
Payroll Taxes		8,550	8,550	8,550	8,550	8,550	8,550	8,550	8,550	8,550	8,550	8,550	8,550	102,600
Fringe / Employee Benefits		8,975	8,975	8,975	8,975	8,975	8,975	8,975	8,975	8,975	8,975	8,975	8,975	107,700
Retirement / Pension		1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	1,342	16,100
TOTAL PAYROLL TAXES AND BENEFITS		18,867	18,867	18,867	18,867	18,867	18,867	18,867	18,867	18,867	18,867	18,867	18,867	226,400
TOTAL PERSONNEL SERVICE COSTS		19.30	109,067	109,067	109,067	109,067	109,067	109,067	109,067	109,067	109,067	109,067	109,067	1,308,800
CONTRACTED SERVICES														
Accounting / Audit		5,150	5,150	5,150	5,150	5,150	5,150	5,150	5,150	5,150	5,150	5,150	5,150	61,800
Legal		433	433	433	433	433	433	433	433	433	433	433	433	5,200
Management Company Fee		-	-	-	-	-	-	-	-	-	-	-	-	-
Nurse Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Food Service / School Lunch		-	-	-	-	-	-	-	-	-	-	-	-	-
Payroll Services		850	850	850	850	850	850	850	850	850	850	850	850	10,200
Special Ed Services		-	-	-	-	-	-	-	-	-	-	-	-	-
Titlement Services (i.e. Title I)		833	833	833	833	833	833	833	833	833	833	833	833	10,000
Other Purchased / Professional / Consulting		1,583	1,583	1,583	1,583	1,583	1,583	1,583	1,583	1,583	1,583	1,583	1,583	19,000
TOTAL CONTRACTED SERVICES		8,850	8,850	8,850	8,850	8,850	8,850	8,850	8,850	8,850	8,850	8,850	8,850	106,200
SCHOOL OPERATIONS														
Board Expenses		-	-	-	-	-	-	-	-	-	-	-	-	-
Classroom / Teaching Supplies & Materials		2,575	2,575	2,575	2,575	2,575	2,575	2,575	2,575	2,575	2,575	2,575	2,575	30,900
Special Ed Supplies & Materials		-	-	-	-	-	-	-	-	-	-	-	-	-
Textbooks / Workbooks		-	-	-	-	-	-	-	-	-	-	-	-	-
Supplies & Materials other		500	500	500	500	500	500	500	500	500	500	500	500	6,000
Equipment / Furniture		417	417	417	417	417	417	417	417	417	417	417	417	5,000
Telephone		1,758	1,758	1,758	1,758	1,758	1,758	1,758	1,758	1,758	1,758	1,758	1,758	21,100
Technology		11,483	11,483	11,483	11,483	11,483	11,483	11,483	11,483	11,483	11,483	11,483	11,483	137,800
Student Testing & Assessment		183	183	183	183	183	183	183	183	183	183	183	183	2,200
Field Trips		183	183	183	183	183	183	183	183	183	183	183	183	2,200
Transportation (student)		-	-	-	-	-	-	-	-	-	-	-	-	-
Student Services - other		3,558	3,558	3,558	3,558	3,558	3,558	3,558	3,558	3,558	3,558	3,558	3,558	42,700
Office Expense		2,125	2,125	2,125	2,125	2,125	2,125	2,125	2,125	2,125	2,125	2,125	2,125	25,500
Staff Development		3,042	3,042	3,042	3,042	3,042	3,042	3,042	3,042	3,042	3,042	3,042	3,042	36,500
Staff Recruitment		250	250	250	250	250	250	250	250	250	250	250	250	3,000
Student Recruitment / Marketing		1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	1,667	20,000
School Meals / Lunch		-	-	-	-	-	-	-	-	-	-	-	-	-
Travel (Staff)		-	-	-	-	-	-	-	-	-	-	-	-	-
Fundraising		250	250	250	250	250	250	250	250	250	250	250	250	3,000
Other		88	88	88	88	88	88	88	88	88	88	88	88	1,050
TOTAL SCHOOL OPERATIONS		28,079	28,079	28,079	28,079	28,079	28,079	28,079	28,079	28,079	28,079	28,079	28,079	336,950
FACILITY OPERATION & MAINTENANCE														
Insurance		1,440	1,178	1,178	1,178	1,178	1,178	1,178	1,178	1,178	1,178	1,178	1,178	14,400
Janitorial		3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	45,400
Building and Land Rent / Lease		9,292	9,292	9,292	9,292	9,292	9,292	9,292	9,292	9,292	9,292	9,292	9,292	111,500
Repairs & Maintenance		3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	3,783	45,400
Equipment / Furniture		-	-	-	-	-	-	-	-	-	-	-	-	-
Security		234	234	234	234	234	234	234	234	234	234	234	234	2,810
Utilities		1,733	1,733	1,733	1,733	1,733	1,733	1,733	1,733	1,733	1,733	1,733	1,733	20,800
TOTAL FACILITY OPERATION & MAINTENANCE		20,266	20,004	20,004	20,004	20,004	20,004	20,004	20,004	20,004	20,004	20,004	20,004	240,310
DEPRECIATION & AMORTIZATION														
DISSOLUTION ESCROW & RESERVES / CONTINGENCY		3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	44,000
		25,000	-	-	-	-	-	-	-	-	-	-	-	25,000
TOTAL EXPENSES		194,928	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	169,667	2,061,260
NET INCOME		95,272	36,833	64,033	(149,420)	333,383	(169,667)	213,753	(163,800)	142,183	(169,667)	142,183	(77,850)	297,240
CASH FLOW ADJUSTMENTS														
OPERATING ACTIVITIES														
Example - Add Back Depreciation		3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	44,000
Other		-	-	-	-	-	-	-	-	-	-	-	-	-
Total Operating Activities		3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	3,667	44,000
INVESTMENT ACTIVITIES														
Example - Subtract Property and Equipment Expenditures		-	(57,700)	-	-	-	(15,000)	-	-	-	(15,000)	-	-	(87,700)
Other		-	-	-	-	-	-	-	-	-	-	-	-	-
Total Investment Activities		-	(57,700)	-	-	-	(15,000)	-	-	-	(15,000)	-	-	(87,700)
FINANCING ACTIVITIES														
Example - Add Expected Proceeds from a Loan or Line of Credit		-	-	-	-	-	-	-	-	-	-	-	-	-
Other		-	-	-	-	-	-	-	-	-	-	-	-	-
Total Financing Activities		-	-	-	-	-	-	-	-	-	-	-	-	-
Total Cash Flow Adjustments		3,667	(54,033)	3,667	3,667	3,667	(11,333)	3,667	3,667	3,667	(11,333)	3,667	3,667	(43,700)
NET INCOME		98,938	(17,200)	67,700	(145,753)	337,050	(181,000)	217,420	(160,133)	145,850	(181,000)	145,850	(74,183)	253,540
Beginning Cash Balance		9,600	108,538	91,338	159,039	13,285	350,336	169,336	386,756	226,623	372,473	191,473	337,323	9,600
ENDING CASH BALANCE		108,538	91,338	159,039	13,285	350,336	169,336	386,756	226,623	372,473	191,473	337,323	263,140	263,140



Vertus Charter Middle School PROJECTED BUDGET / OPERATING PLAN FOR INITIAL CHARTER PERIOD						Assumptions
*NOTE: If a Planning Year is Taken in the Beginning of the Charter, the Charter Will Be Extended to Encompass Five Years of Operation. Projected Five Year Budget on this Tab Should Be For the First Five Years of Actual Operations.						DESCRIPTION OF ASSUMPTIONS - Please reference section/page number in application if applicable. For example, student enrollment would reference the page in the application that states enrollment targets.
Please Note: The student enrollment data is entered below in the Enrollment Section beginning in row 148. This will populate the data in row 10.						
Total Revenue	2,358,500	4,375,600	4,249,300	4,325,400	4,403,500	
Total Expenses	2,061,260	3,649,000	3,758,400	3,839,400	3,908,000	
Net Income (Before Cash Flow Adjustments)	297,240	726,600	490,900	486,000	495,500	
Actual Student Enrollment	95	190	190	190	190	
Total Paid Student Enrollment	95	190	190	190	190	
	Year 1 2027/28	Year 2 2028/29	Year 3 2029/30	Year 4 2030/31	Year 5 2031/32	
*Year 1 should tie to Totals for Year 1 on Tabs 4 and 5						
Per Pupil Revenue Percentage Increase						
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School District 4 (Enter Name)	-	-	-	-	-
School District 5 (Enter Name)	-	-	-	-	-
TOTAL ENROLLMENT	95	190	190	190	190
REVENUE PER PUPIL	24,826	23,029	22,365	22,765	23,176
EXPENSES PER PUPIL	21,697	19,205	19,781	20,207	20,568
CASH FLOW ADJUSTMENTS					
OPERATING ACTIVITIES					
Example - Add Back Depreciation	44,000	110,000	110,000	110,000	110,000
Other	-	-	-	-	-
Total Operating Activities	44,000	110,000	110,000	110,000	110,000
INVESTMENT ACTIVITIES					
Example - Subtract Property and Equipment Expenditures	-	(122,800)	(92,100)	(91,900)	(91,900)
Other	-	-	-	-	-
Total Investment Activities	-	(122,800)	(92,100)	(91,900)	(91,900)
FINANCING ACTIVITIES					
Example - Add Expected Proceeds from a Loan or Line of Credit	-	-	-	-	-
Other	-	-	-	-	-
Total Financing Activities	-	-	-	-	-
Total Cash Flow Adjustments	44,000	(12,800)	17,900	18,100	18,100
NET INCOME	341,240	713,800	508,800	504,100	513,600
Beginning Cash Balance	9,600	350,840	1,064,640	1,573,440	2,077,540
ENDING CASH BALANCE	350,840	1,064,640	1,573,440	2,077,540	2,591,140